

THE PROFESSIONALISATION OF ELECTION CAMPAIGNING IN MEXICO
A STUDY ON CONTINUITY AND CHANGE IN PRESIDENTIAL CAMPAIGN
PRACTICES AND COMMUNICATIONS (1988-2006)

by

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Abstract

This thesis seeks to fill a gap in the literature on Mexican politics relating to the analysis of major recent changes in campaign tactics and strategies (usually referred to as ‘campaign professionalisation’) and their causes. I argue that the Mexican experience may shed light on the factors driving the professionalisation of electoral campaigns in new democracies, particularly on the causal role of a number of systemic and party-level variables. Building on the comparative literature on party and campaign change, and using Qualitative Comparative Analysis (QCA), this study shows that the professionalisation of presidential campaigns in Mexico was not only driven by the demands of large-scale changes in the Mexican party and media systems during democratisation on candidates’ campaign organisations, but also, to a significant extent, by a number of parties’ organisational features and resources. The argument of the thesis is that while party-specific factors are not the ultimate causes of campaign innovations, they are key mediating conditions between broader systemic changes on the one hand, and campaign behaviour on the other. They are therefore crucial in order to explain cross-party differences in the extent of the adoption of professionalised campaigning in Mexico.

Dedication

To My Parents

and

To My Teachers

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List of Abbreviations

AC	Alliance for Change (electoral coalition of the PAN and the PVEM in 2000)
AM	Alliance for Mexico (electoral coalition led by the PRD in 2000)
Coalición Por el Bien de Todos	Coalition for the Good of All (electoral coalition led by the PRD in 2006)
IMEVISION	Mexican Institute of Television (state-run television network)
IFE	Federal Electoral Institute
NAFTA	North American Free Trade Agreement
PAN	National Action Party
PARM	Authentic Party of the Mexican Revolution
PCM	Mexican Communist Party
PDM	Mexican Democratic Party
PEM	Mexican Ecologist Party
PEMEX	Mexican Petroleum Company
PFCRN	Cardenista Front of National Renovation Party
PMS	Mexican Socialist Party
PNR	National Revolutionary Party
PPS	People's Socialist Party
PRD	Party of the Democratic Revolution
PRI	Institutional Revolutionary Party
PRM	Party of the Mexican Revolution
PRONASOL	National Solidarity Program
PRT	Revolutionary Workers' Party
PST	Socialist Workers' Party
PSUM	Mexican Unified Socialist Party
PT	Workers' Party/Labour Party
PVEM	Mexican Green Ecologist Party
TELEVISA	Largest private television network
TVAzteca	Second largest television network

1 Introduction

On the 2nd of July 2000, Vicente Fox, the presidential candidate of the centre-right *Partido Acción Nacional* (National Action Party – PAN), achieved a dramatic victory in the Mexican presidential election. Fox's victory brought to an end one of the world's longest-serving electoral authoritarian regimes. After seven decades in power, the *Partido Revolucionario Institucional* (Institutional Revolutionary Party – PRI) was finally defeated, and by a wide margin. A number of factors explain the PRI's defeat, involving profound changes in the country's political economy and in the structure and behaviour of the Mexican electorate that took place over the last few decades of the 20th century. Nevertheless, it cannot fully be explained without also taking into account campaign-related factors, particularly a number of significant changes in the opposition political parties' campaign tactics and strategies. As Klesner notes, the PRI's protracted demise also reflected opposition parties' weaknesses, including their limited bases of support and 'campaign strategies seemingly not intended to reach beyond those social bases' (2005: 103). Beltrán (2007: 6) describes the new capital-intensive and candidate-centred model of political campaigning which took place for the first time in that election: 'all candidates hired professional political consultants and media strategists (many from the United States), TV dominated over any other media, images predominated over issues and the campaign was centred on the contenders instead of the parties'. Six years later, the PAN presidential nominee, Felipe Calderon, would retain the presidency of the republic, this time in a hard-fought race against Andrés Manuel López Obrador, the candidate of the centre-left *Partido de la Revolución Democrática* (Party of the Democratic Revolution – PRD). Again, campaign dynamics played a key role in defining the outcome of the election.

This thesis is about a number of relevant changes in the ways that Mexican parties and candidates run their campaigns and appeal to voters that have taken place over the last two decades, and assesses their causes. The main motivation for carrying out this study is the relative lack of works

on changes in Mexico's campaign practices from a comparative perspective. Most research on Mexican campaigns has focused heavily on the *campaign effects field* (Norris, 2002). Scholars of Mexican politics have devoted most of their efforts to the study of campaign effects on voting intentions, rather than campaigning. Usually, these studies try to evaluate the impact of different sorts of campaign messages on a number of dimensions of public opinion and political behaviour, such as political knowledge, attitudes, and values. Studies have analysed issues such as media effects and electoral volatility (Flores-Macías, 2009; Maldonado Hernández, 2009); how voters assimilate campaign information (Moreno, 1999, 2002b, 2003); the effects of negative campaigns on voters (Moreno, 2002a, 2004; Guerrero and Arellano Toledo, 2012); the influence of television coverage on voting decisions (Lawson, 1999, 2002; Moreno, 2003; Lawson, 2004b; Lawson and McCann, 2005); the combined effect of political advertising and news coverage on voting preferences (Beltrán, 2007); the consequences of televised debates on public opinion and images of candidates (Lawson, 2004a); the impact of media-based campaign appeals vis-à-vis people-intensive communication channels (Valdivia and Beltrán, 2009); the role of campaign issues and ideology in voting behaviour (Magaloni and Poiré, 2004a; Greene, 2009). Only some studies have focused more directly on changes in the campaign tactics and strategies of political parties and candidates as *campaign organisations* (Wallis, 2001; Mendé Fernandez, 2003; Bruhn, 2004; Domínguez, 2004; Shirk, 2005; Langston, 2006; Bruhn, 2009; Freidenberg and González, 2009; Langston, 2009; Langston and Benton, 2009; Langston and Morgenstern, 2009). These analyses provide useful insights into how campaigning has changed over the last two decades. However, most of them are rather descriptive, and do not explain *why* campaign tactics and strategies have evolved over time. In sum, a large amount of research has concentrated on Mexican campaigns as independent variables of political behaviour and public opinion, and not on changes in campaign tactics and strategies as dependent variables of systemic, institutional, and party-specific factors.

Certain scholars (Mendé Fernandez, 2003; Bruhn, 2004; Camp, 2004; Cornelius, 2004; Langston, 2006; Langston and Benton, 2009) have stressed the effect of democratisation and electoral change on electioneering. For instance, after carefully analysing changes in congressional campaigning between the period of authoritarian rule and the competitive period, Langston (2006) concluded that shifts were not driven by technological change or transformations in the media system, but by electoral reforms and the rise of competitiveness in the party system.¹ She contends that, although the increase in electoral competition has modernised Mexican campaigns, it has not occurred precisely in the same way as in the U.S. Moreover, her work shows that, in spite of significant changes, Mexican campaign practices still reflect some country-specific features, determined by the institutional and systemic national context, instead of simply exhibiting an 'Americanised' style. In a similar vein, Langston and Benton (2009) have offered an in-depth analysis of a relevant and distinctive ground-based component of modern Mexican presidential campaigns: the candidate appearances and events in municipalities that took place in the presidential election of 2006. Nevertheless, most of the studies that stress the causal role of systemic and institutional factors on the transformation of Mexican campaigning pay insufficient attention to party-specific factors when explaining changes and continuities in campaign practices and differences between the parties.

This study seeks to fill one of the gaps in the literature on campaigns in Mexico; specifically, offering an analysis of the transformation of the leading parties' campaign tactics and strategies (usually labelled in the literature as campaign modernisation or professionalisation) and its causes from a comparative perspective. I believe that a careful examination of the Mexican case will allow an untangling of the forces at work behind the rise of modern campaign practices in developing

¹ By electoral reforms she refers to the new electoral rules, which placed greater obstacles to electoral fraud by establishing an independent electoral management body – the Federal Electoral Institute. The rules also allowed for fair and well-founded campaigns by providing parties with large amounts of public financing and mass-media access (see Chapter 5).

democracies, and a better understanding of the interactions between a number of structural and party-level variables regarded by specialists as relevant predictors of professionalised campaigning. I also believe that the Mexican experience may shed light on campaign professionalisation elsewhere, particularly in countries that have transited to democracy from competitive electoral authoritarian regimes.

This work adheres to recent methodological perspectives that case studies are, as a form of qualitative, case-oriented research designs, of continuing value to comparative social-science research (George and Bennett, 2005; Gerring, 2007). As a case study, Mexico offers a number of theoretical and practical advantages. First, it provides substantial variation across time and across parties in the dependent and the explanatory variables included in the analysis. Another advantage of this research design is that data on a relatively wide range of variables can be collected on the Mexican case.

Chapter 2 of the thesis provides a survey of the literature on election campaigns. It also contains the analytical and methodological framework of the study. Chapter 3 offers a brief description of the Mexican political system and its democratic transformation. It focuses on the main features of the Mexican competitive electoral authoritarian regime that ruled the country from the 1930s until the late-1990s, Mexico's transition to democracy, and the causes of this transformation and its consequences for political competition.

Chapters 4, 5, and 6 focus on changes in the context of political campaigns in Mexico, particularly the systemic and institutional transformations driving the professionalisation of political campaigns. Chapter 4 analyses a number of relevant changes in the Mexican party system, the structure and behaviour of the Mexican electorate (involving partisan dealignment), the rise of electoral competitiveness, volatility, and two-party competition across the country, and how these elements relate to campaign change. Chapter 5 discusses relevant transformations in the Mexican media system that fostered Mexican parties' adoption of media-centred campaign tactics and

strategies. Chapter 6 traces the consequences of continuous reforms on the regulatory framework of party and campaign financing for the professionalisation of campaigning.

Chapters 7 and 8 describe a number of major shifts in presidential election campaigns from 1988 to 2006, involving campaign management and staffing, research, and communications. Particular attention is paid to campaign innovations relating to poll-driven and media-based campaign tactics and strategies, such as the use of a wide range of polling techniques, focus groups, media management, and negativity in political advertising. The differing degrees to which parties have adopted modern campaign practices are of central concern.

Chapter 9 then analyses the causal pathways (combination of causal variables) to the professionalisation of presidential campaigns by using Fuzzy-set Qualitative Comparative Analysis (*FsQCA*). It seeks to understand why Mexican political parties succeeded or failed to adopt professionalised campaigning during the period under study. In order to do this, it draws on an analytical model based on the logic of Boolean algebra, assessing the impact of a number of relevant party-specific factors on campaign change vis-à-vis the systemic and legal-institutional conditions analysed in chapters 4, 5, and 6.

The final chapter (10) provides a more detailed narrative that integrates the findings of previous chapters, devoting particular attention to the role of party-specific factors in fostering or halting parties' adoption of professionalised campaigning. Together, Chapters 8 and 9 focus on the interactions between systemic and party-level variables in the process of campaign professionalisation.

2 The Study of Election Campaigns

Introduction

An election campaign can be defined as ‘the process by which a campaign organization (be it a party, candidate, or special interest organization) seeks to maximize electoral gains’ (Farrell, 1996: 161). It includes all those organised efforts (promotional or financial) to ‘inform, persuade, and mobilize’ the electorate (Norris, 2002: 127). Pippa Norris (2002: 127) proposes an analytical model of four distinct elements to systematise the academic study of campaigns:

- The *contextual environment* based on the legal regulations and structure of the mass media within each country
- The *campaign organisations* with strategic objectives that they are seeking to communicate
- The direct and mediated *channels of communication* employed by these organisations to convey their messages
- The *effects* of these messages on the target audience²

Each of the elements of the model proposed by Norris has received attention either by political scientists or communication scholars. Nevertheless, some areas have been more researched than others. For instance, the field concerning the effects of campaign messages on voting behaviour is, perhaps, the area in which more research has been conducted, particularly in the United States (Farrell, 1996; Norris, 2002).³ By contrast, other areas, such as the contextual environment of

² Depending on the effectiveness of campaigns, it can be studied a kind of fifth element, known as ‘dynamic feedback loop as organizations learn about the response of their targeted audience and adjust their goals and strategies accordingly’ (Norris, 2002: 127).

³ The early studies on political communication leading to the *minimal effects* paradigm set an academic trend which influenced several works on electoral research and media effects during the following decades. These findings remained relatively unchallenged until the emergence of competing theories which questioned the supposed minimal consequences of political messages. The new theoretical developments in media-effects research proposed alternative models of direct and also indirect effects, capable of overcoming the ‘selective perception’ process, producing changes in cognitions and political knowledge rather than in political attitudes

campaigns, the campaign organisations (Farrell and Webb, 2000), and their tactics and strategies (Farrell, 1996; Trent and Friedenberg, 2008) have been less studied, and only until more recently (for a review, see Norris, 2002). As a result, behavioural and organisational features of election campaigns have remained considerably under-researched for several decades. In his book *Influencing Voters: A Study of Campaign Rationality* (1967), Richard Rose points out this major gap in political science:

The study of voting behavior and the study of the behavior of campaigners are both important in understanding politics. To date, social scientists have concentrated much more sophisticated attention upon the systematic study of voters. In the past quarter-century, scholars of voting in America, Britain and other countries have developed rigorous and elaborate techniques for analyzing influences upon voting behavior. Unfortunately, we do not have a similarly sophisticated conceptual framework for studying the behavior of campaigners (Rose, 1967: 23).

During the 1970s and 1980s a number of pioneering works were produced on the issue; most of them were single-country studies focused on the U.S. (Nimmo, 1970; Agranoff, 1976b:a; Lindon, 1976; Maisel, 1976; Penniman, 1981; Sabato, 1981; Smith, 1981; Blumenthal, 1982; Mauser, 1983; Godwin, 1988; Luntz, 1988; Sabato, 1989; O'Shaughnessy, 1990; Wattenberg, 1991), Western Europe

and behaviour. An example of such models are ‘the spiral of silence’ (Noelle-Neumann, 1973, 1974), the ‘agenda-setting’, ‘framing’, and ‘priming effects’ hypothesis (McCombs and Shaw, 1972; Iyengar and Kinder, 1987; Iyengar, 1991), and theories based on long-term rather than short-term changes, like the ‘cultivation analysis’ (Signorielli and Morgan, 1990) (see, for reviews, Bryant and Zillmann, 1994; Semetko, 1996; Norris et al., 1999; Perse, 2001). The emergence of all these theories was also associated with methodological developments in political communication research (see, for an overview, Graber, 2004). The combination of more sophisticated and complex research designs and techniques involving cross-sectional and longitudinal studies (panel surveys), experimental methods, and content analysis, made it possible to detect a wider variety of political communication effects. Since most of the early studies on the influence of campaigns on voting were done in the absence of television and modern campaign techniques, a number of political-behaviour scholars gradually conducted more research about how the changing communication practices and actions of political parties, candidates, and other relevant political actors (e.g. journalists) influence voting behaviour. This produced an increasing number of outstanding and influential studies, which also reconsidered the influence of media and campaign variables on public opinion and voting behaviour (Popkin, 1991; Zaller, 1992; Ansobehere and Iyengar, 1995; Zaller, 1996; Mutz, 1998).

(Le Seac'h, 1981; Wangen, 1983; Farrell, 1986; Statera, 1986; Bobin, 1988; Mazzoleni, 1991), and Latin America (Martz, 1971). Most of them were very important for theory-generation and subsequent comparative research on campaigning. Nevertheless, despite the value of these works, Harrop and Miller concluded in their overview of the state of the literature on electoral research in the late 1980s that '[t]he study of election campaigns, as opposed to elections is a major gap' (1987: 240). Butler and Ranney (1992) also claimed, in one of the earliest comparative studies on campaign practices, that '[t]here are virtually no books that deal comparatively with questions about electioneering'. This loophole in the literature has gradually been filled by a growing number of studies carried out from a comparative perspective.

Throughout the 1990s, scholars conducted a wide number of single-country studies on Britain (Kavanagh, 1995; McNair, 1995; Scammell, 1995; Negrine, 1996), France (Maarek, 1995), Italy (Mazzoleni, 1991), Ireland (Butler and Collins, 1993), and Germany (Bergmann and Wickert, 1999), as well as cross-national studies exploring the patterns of change in campaign practices across countries. The comparative literature on the issue includes a range of works, such as edited volumes (Fletcher, 1991; Kaid et al., 1991; Bowler and Farrell, 1992a; Butler and Ranney, 1992; Kaid and Holtz-Bacha, 1995; Swanson and Mancini, 1996b; Kaid, 1999; Priess and Tuesta Soldevilla, 1999; Mair et al., 2004; Kaid and Holtz-Bacha, 2006; Schafferer, 2006; Negrine et al., 2007), monographs (Norris, 2000; Plasser and Plasser, 2002), and book chapters (Farrell, 1996; Plasser et al., 1999; Farrell and Webb, 2000; Blumler and Gurevitch, 2001; Norris, 2002; Holtz-Bacha, 2004; Espíndola, 2006; Farrell, 2006; Gibson and Römmele, 2008; Wlezien, 2010), as well as numerous articles in mainstream and specialist academic journals. The general notion in most of these studies is that recent decades have seen a process of cross-national change and convergence in contemporary styles of campaigning in many established and developing democracies. In spite of some important differences regarding the timing and extent of these transformations, most authors agree on the core aspects of campaign change. Table 1 summarises these changes.

Table 1 Stages in the Development of Election Campaigning

	<i>Stage 1 Premodern</i>	<i>Stage 2 Modern</i>	<i>Stage 3 Post-modern</i>
<i>Predominant era</i>	<i>Mid-19thC to 1950s</i>	<i>Early 1960s-late 1980s</i>	<i>1990s+</i>
<i>Technical developments</i>			
Preparations	Short-term, ad hoc	Long campaign: Specialist committee established a year or two years in advance of election	Permanent campaign: Establishment of specialist campaign departments
Use of Media	Direct and Indirect Direct: Partisan press, local posters, newspaper ads, billboards, pamphlets, radio broadcasts Indirect: Newspaper coverage	Emphasis on 'Indirect' Direct: Ad campaigns, targeted direct mail Indirect: Television broadcasts through main evening news, public relations, media training, press conferences	Emphasis on 'Direct' TV narrowcasting (targeted ads), direct and mediated websites, direct mail, email, online discussion groups, Intranets Indirect: As before
<i>Resource developments</i>			
Campaign Organisation	Decentralised Local party organisation Little standardisation Staffing: party/candidate-based and decentralised party volunteers	Centralised Nationally coordinated with greater professionalisation Staffing: party-based, salaried professionals	Nationally coordinated but decentralised operations
Agencies, consultants	Minimal use, 'generalist role' Politicians in charge	Growing prominence of 'specialist' consultants Politicians still in charge	Staffing: party/candidate-based, professional, contract work; growth of leader's office Consultants as campaign personalities International links 'Who is in charge?' Special party campaign units
Central coordination	Party leaders	Central party headquarters	
Sources of Feedback	Impressionistic, 'feel' Important role of group leaders, local canvassing, and party meetings	Large-scale opinion polls More scientific	Regular use of a greater range of polling techniques, focus groups and interactive web-sites, cable
Costs	Labour-intensive Low budget	Capital-intensive Moderate	Capital-intensive Higher costs for professional consultants
<i>Thematic developments</i>			
Campaign events	Local public meetings, whistle-stop leadership tours	Television debates, News management, daily press conferences, pseudo-events, and controlled photo-ops	As before; events targeted more locally, extension of news management to routine politics and government
Targeting of voters	Social-class support base Maintain vote of specific social categories	Catch-all Trying to mobilise voters across all categories	Market segmentation Targeting of specific categories of voters
Campaign communication	Propaganda	Selling concept	Marketing concept
Electorate	Stable social and partisan alignments	Social and partisan dealignment	Social and partisan dealignment

Source: Adapted from Farrell and Webb (2000: 104); Norris (2002: 135); Gibson and Rommelle (2008: 482).

The specialised literature offers a variety of terms for labelling this process, such as *Americanisation*, *modernisation*, *professionalisation*, *candidate-centred campaigning*, and *political marketing orientation*. However, some of them have come under increasing scrutiny. For instance, the term ‘Americanisation’ (Epstein, 1980 [1967]; Statera, 1986) (see also Gurevitch and Blumler, 1990), considered to be a useful working hypothesis to describe changes in electioneering in a number of early comparative studies (Butler and Ranney, 1992; Kaid and Holtz-Bacha, 1995; Swanson and Mancini, 1996b), was later criticised by many scholars, who argued that it often implied an exaggerated process of cross-national convergence. Its use implied that campaign tactics and strategies employed by parties and candidates in different regions of the globe were becoming increasingly similar – if not identical – to those of their counterparts in the United States, regardless of the significant restrictions posed by country-specific structural, cultural, and institutional settings (Negrine and Papathanassopoulos, 1996; Swanson and Mancini, 1996b; Norris, 2000; Baines et al., 2001; Blumler and Gurevitch, 2001; Norris, 2002).

Instead, theorists proposed alternative terms, such as ‘modernisation’ or ‘professionalisation’, which were regarded as more suited to capturing the complexity of changes and developments in electoral campaign practices and their causes, particularly the key role played by a number of systemic and party-level factors in shaping the evolution of electioneering. Consequently, following previous analyses (Gibson and Römmele, 2001; Holtz-Bacha, 2002; Smith, 2006; Negrine, 2007; Papathanassopoulos et al., 2007; Gibson and Römmele, 2009; Strömbäck, 2009), this study draws upon the concept of ‘campaign professionalisation’, understood as a continuous process by which political parties and candidates adapt their campaign tactics and strategies to continuous changes in the political and media systems (Holtz-Bacha, 2002). As alternative descriptors, professionalisation is not an uncontested concept (see, for some important criticisms, Lilleker and Negrine, 2002). However, I prefer it over alternative terms – such as ‘Americanisation’ or ‘modernisation’ – since it allows us to focus not only on the role of systemic

variables driving campaign change, but also on the factors that condition the extent of the use of new campaign techniques within individual party organisations. Gibson and Römmele (2009: 268) argue that the concept of professionalisation

places the analytical focus on the organization itself and its internal dynamics, in terms of charting and interpreting the process of change taking place rather than looking to the broader contextual and societal forces driving these changes. [...] In doing so, it switches the focus from the institutional and socio-structural environment that Americanization and modernization approaches have typically used to understand the spread of the new practices, to the [party] organizational level' (Gibson and Römmele, 2009: 268-269).

In sum, as Smith (2006: 2) points out, '[t]he concept of professionalization thus has an empirical content that is more specific, yet no less apt, than the broader term modernization, and the trend it describes is more universal than the diffusion of campaign technique implied by the term Americanization'.

Approaches to the Analysis of Campaign Change

According to Plasser and Plasser (2002), two contrary approaches can be identified in the academic discussion about the nature, causes, and consequences of campaign change: diffusion and modernisation. In the diffusion approach, closely linked to the Americanisation thesis, the explanation of professionalisation is primarily focused on 'the micro-level of entrepreneurial actors, exporting their strategic know-how to foreign contexts by supply- or demand-driven consultancy activities, thus changing and modifying the campaign practice in the respective countries' (Plasser and Plasser, 2002: 17). From this perspective, processes of change and cross-national convergence in campaign practices across established and developing democracies may be explained 'as partly caused by an elite-driven diffusion of US-campaign styles' (2002: 18). Thus, analysis should be directed at a closer examination of the innovative practices employed by campaign professionals

worldwide, as well as ‘the influential role of American overseas consultants shaping and changing campaign practices on the global political market-place’ (Plasser and Plasser, 2002: 18).

In contrast, the modernisation approach considers that contemporary changes in campaign practices should not be seen as reflecting a pattern of worldwide standardisation based on a direct imitation of U.S. campaigning features, but as a common response by campaign organisations, voters, and the media to ‘problems that derive from the very nature of modernity’ (Negrine and Papathanassopoulos, 1996: 60). From the modernisation perspective, global transformations in contemporary campaigning styles that resemble the pool-driven and media-based campaign developments that initially took place in the U.S. are regarded mostly as the consequence of endogenous changes in the social, political, and media systems common to a number of established and new democracies, rather than the simple adoption and imitation of an external ‘Americanised’ model (Caspi, 1996; Kavanagh, 1996; Negrine and Papathanassopoulos, 1996; Scammell, 1998; Blumler and Kavanagh, 1999; Norris, 2000; Baines et al., 2001; Norris, 2002). Whereas the diffusion approach stresses the active role of micro-level factors in shaping campaign change, the modernisation perspective argues that changes in the strategic behaviour of micro-level agents (e.g. political consultants, campaign managers) and meso-level actors (e.g. parties and candidates’ staffs, as well as other campaign organisations) are a gradual adaptation to macro-level transformations (party system and media system change, technological development, and other structural and institutional factors), which are seen as the driving force of the professionalisation process.

Accordingly, the advocates of this approach tend to prefer the terms campaign modernisation or professionalisation to refer to changes in campaign practices and communications, and focus on the diverse ways in which they have evolved over time in different countries. This situates the changes along a continuum which goes from pre-modern to modern and then post-modern stages (see Table 1). As with the ‘diffusion’ approach, the modernisation perspective acknowledges the significant impact of American campaign strategies and techniques on the

campaign practices of parties and candidates worldwide, which often import innovations from the U.S. Nevertheless, it contends that, because of diverse regulatory frameworks and the different electoral, party, and media systems, a number of core and distinctive features of political campaigning styles in Europe, Latin America, or East Asia are essentially retained (Mazzoleni and Schulz, 1999).

Plasser et al. (1999) distinguish between two models of the global diffusion of American campaign innovations: the ‘shopping’ and the ‘adoption’ models (see also Farrell, 2005). The former – preferred by advocates of the modernisation perspective – carries the idea that ‘[c]ertain techniques and organisational routines of professional campaign practices are imported, modified according to the national context of political competition, and implemented taking the national context of political competition into account’ (Plasser et al., 1999: 105).⁴ Thus, the importation of campaign innovations ‘primarily focuses on concrete and down-to-earth techniques that can easily be implemented in the national context while maintaining the country-and culture-specific campaign styles and philosophies’ (Plasser, 2000: 35).⁵

On the other hand, the ‘adoption’ model seems to be more compatible with the diffusion approach, since it implies that campaign actors and organisations across the world tend to ‘adopt the strategic axioms of U.S. consultants and campaigns experts, which are regarded as more promising than the traditional local campaign approach’ (Plasser and Plasser, 2002: 18). The adoption of such axioms is often characterised by ‘the disregard for conventional organisational election campaigns and programmatic-ideological continuity and by a fixation on the candidate’s image, strategic product development, targeted-group marketing, news management, spin control, permanent campaigning and negative advertising’ (Plasser, 2000: 35).

⁴ See also Baines et al. (2001) and Blumler and Gurevitch (2001).

⁵ See also Norris (2001) and Farrell and Schmitt-Beck (2002).

While both diffusion paths produce a professionalised, ‘capital-intensive’ style of campaigning – as opposed to an ‘amateur’ or ‘labour-intensive’ approach (Farrell, 1996) – their outcomes are, however, significantly different. For example, the shopping model leads to a ‘hybridization’ pattern (Blumler and Gurevitch, 2001; Plasser and Plasser, 2002), understood as the ‘country-specific supplementation of traditional campaign practices with selected features of the American style of campaigning’ (Plasser and Plasser, 2002: 19).⁶ On the other hand, the adoption model leads to a ‘standardization’ of global campaign tactics and strategies caused by the gradual replacement of traditional campaign styles by ‘capital-intensive, media- and consultant-driven campaign practices’ (Plasser and Plasser, 2002: 19). Hence it ‘stands for a break with the distinct styles of European, Latin American and Asian campaigning’ (Plasser, 2000: 35). Contrasting it with the diffusion approach, the modernisation scholars contend that what is actually happening is a process of ‘non-directional’, as opposed to ‘directional’ (one-way), convergence between the campaign practices displayed in the United States and those emerging in Western European, Latin American, and Asian countries (Plasser and Plasser, 2002).⁷

In the end, both approaches agree that the result of such transformations is an increasing similarity between campaign styles and practices across new and established democracies (Caspi, 1996; Kavanagh, 1996; Negrine and Papathanassopoulos, 1996; Swanson and Mancini, 1996b; Norris, 2002; Plasser and Plasser, 2002). Proponents of the modernisation approach, however, argue that such convergence cannot be considered as a transnational pattern of uniformity, and that it is necessary to take into account not only the role of structural, technological, or legal-institutional factors in driving change, but also the cultural and historical ‘path-dependency’ impact of broader

⁶ For case studies focusing on the hybridisation of campaigns in Latin America and Western Europe, see Nord (2006) and de la Torre and Conaghan (2009).

⁷ According to Plasser and Plasser, examples of one directional convergence are ‘the orientations of planning strategies of political communication similar to the ways of political marketing [...] or the adoption of US-American forms of political coverage and their underlying news values’ (2002: 16).

modernisation processes. In this vein, the modernisation approach tends to establish a distinction between two levels of contextual or macro-level factors: the institutional and the cultural/historical. It also assumes that culture- and context-specific variables strongly shape or even determine the responses of political communication actors to changing technological, electoral, and institutional settings.

In sum, despite the disagreement between scholars about the best term to describe contemporary changes in campaigning techniques and practices, there is an increasing recognition of the significance of micro- as well as macro-level factors in shaping campaign innovations. Some of them acknowledge the importance of agency in the global diffusion of modern campaign techniques and strategies, arguing that there is plenty of evidence of the key role of professional campaign managers and consultants as entrepreneurs of innovations in electoral campaigning across the world (Plasser and Plasser, 2002). However, they also stress the importance of the variety of social-structural settings, structures of media systems and party competition, electoral systems, and regulatory frameworks in shaping campaign practices (Holtz-Bacha, 2004).

Far from supporting the idea of one standard or global model of campaigning, then, there is an increasing acknowledgment among political scientists and political communication scholars (Butler and Ranney, 1992; Swanson and Mancini, 1996b; Norris, 2002; Plasser and Plasser, 2002; Negrine et al., 2007) that the diversity of institutional, cultural, and organisational contexts leads to considerable variety in the strategic responses of campaign organisations to changing media and electoral environments. The outcome of the mix of endogenous and exogenous strategies ends in evident similarities, but also a number of considerable differences, especially regarding core practices and styles of contemporary electioneering. Therefore, in the end, both

the *diffusion* and the *modernization* hypotheses supply strong evidence for a *hybridization* – or a merger of traditional country- and culture- specific campaign practices – with selected transnational features of modern campaigning. Thus, the process of globalization or internationalization of election campaigns does

not lead to a uniform standardization of campaign practices which reflect structural specific features rather than exhibit a one unique style or standard model of campaigning (Plasser and Plasser, 2000: 351).

This position has methodological consequences. It points strongly to the need to conduct both comparative and in-depth case-study analysis, because the focus should be put on explaining how political communication actors – such as candidates, parties, campaign managers, and journalists, all situated in diverse cultural, historical, and institutional contexts – are affected by, and respond in different ways to, exogenous variables (such as the processes of global diffusion of campaigning techniques and technological shift) and endogenous factors (involving changes in the regulatory frameworks, electoral and party systems, and party organisational features and resources). It also stresses the importance of the careful analysis of such mediating conditions in order to understand the wide variety of political actors' reactions to structural changes.

Campaign Change in Developing Democracies

Despite the growing importance of changes in campaign tactics and strategies for democratic political competition around the world, comparative research on the issue has largely focused on advanced Western democracies (usually the U.S. and Western European countries, although see for important exceptions, Butler and Ranney, 1992; Swanson and Mancini, 1996b; Plasser and Plasser, 2002; Espíndola, 2006; Schafferer, 2006). And so some leading scholars, like Holtz-Bacha (2004), have argued that European-based research on campaign change has hardly led to results that can be generalised beyond the European context, and they have stressed the need for further transnational comparative research:

Comparative research on European elections [...] cannot lead to general conclusions about modern campaigns in general. Transnational comparisons, however, can deliver findings about similarities and differences at the macro level and about the influence of systemic variables such as, for instance, political culture or the media system on the political communication process (Holtz-Bacha, 2004: 219).

Some other authors, like David Farrell (2006), have also acknowledged the ‘Western European bias’ in much of the comparative research on party and campaign change; he argues that ‘any consideration of comparative trends [...] needs to take account of what has been happening in the newer democracies’ (Farrell, 2006: 124). Certainly, as he points out, the so-called ‘third wave’ of democratisation (Huntington, 1991) provides much more room than previous contexts for comparative analysis on campaign change intended to assess the extent of global convergence in campaign practices. Such comparative analysis would also facilitate testing the relevance of a number of explanatory factors – identified in the literature on campaign change in advanced democracies – in shaping professionalisation trends in new democratic systems across Latin America, Eastern and Central Europe, East Asia, the former Soviet Union, and parts of Africa.

There have nevertheless been some disagreements among scholars about how to approach the study of campaign change in developing democracies. For instance, Taylor Boas argues, in his comparative analysis of changes in presidential election campaigns in Chile, Brazil, and Peru, that ‘political scientists have not yet offered a satisfactory explanation for how and why these [campaign] strategies evolve over time’ (Boas, 2010: 636). He argues that existing research on campaign change in Latin America

often draw upon studies of the United States and Western Europe, which have decades or even centuries of democratic experience. Such studies typically posit a process of cross-national convergence, variously described as modernization, professionalization, Americanization, or the rise of political marketing. Scholars of Latin America who have addressed this topic have generally adopted these existing theoretical perspectives, rather than positing that campaign strategies in the region’s new democracies should follow a different path (Boas, 2010: 636).

And so this study seeks to contribute to the comparative literature on changes in campaign practices. The aim is to analyse whether a number of factors driving campaign change in established

democracies are also relevant causes of transformations in electioneering in developing democratic systems, with Mexico as a case study. Before proceeding, however, I want to establish a distinction between two types of emerging democracies: those countries which experienced a transition to democracy from some kind of fully closed authoritarian regime, and those which did it from some type of competitive electoral authoritarian regime (such as Mexico) (Schedler, 2006, 2009; Levitsky and Way, 2010a).

In cases of transitions from fully closed authoritarian rule, essential conditions for democratic political campaigning, such as open elections, opposition parties, and effective party competition, did not exist during the authoritarian period, but were introduced as part of the new democratic institutional arrangement.⁸ On the other hand, in cases of transition from competitive electoral authoritarian regimes, opposition parties were allowed to develop, and relatively open elections were actually held – even though they do not meet the minimum conditions for effective multiparty competition.⁹ In these kinds of hybrid regimes, characterised by a mixture of some democratic features and several authoritarian mechanisms restricting political competition, democratisation is

⁸ Levitski and Way (2010a: 6-7) regard fully closed authoritarian regimes to be those in which ‘no viable channels exist for opposition to contest legally for executive power [...] and hegemonic regimes in which formal democratic institutions exist on paper but are reduced to façade status in practice’. Examples of the former are those regimes in which elections, parties, and other essential democratic institutions are completely non-existent. The latter include hegemonic regimes that hold elections, but where opposition parties face significant restrictions and repression, and/or fraud is so pervasive that there is no doubt about their outcome. Following Sartori’s classification (1976), the Mexican case was for many years considered as a hegemonic party regime (Craig and Cornelius, 1995).

⁹ In contrast to fully closed regimes, opposition parties in competitive electoral authoritarian regimes are allowed to contest for political power in regularly scheduled elections through a number of legal-institutional channels (often granted at the constitutional level). They open branches, recruit activists, select candidates, and run campaigns in order to compete for executive and legislative posts at the national/sub-national levels. Although electoral fraud may certainly occur, it is not as pervasive as in hegemonic regimes, and incumbents make use of selective instead of overt repression. In sum, formal electoral institutions and procedures are meaningful enough for the opposition to take them seriously as legitimate ways through which to contest for power. On the other hand, elections in electoral autocracies still fall short of being ‘instruments of democracy’ (Powell, 2000), and function instead as means of enhancing regime legitimacy. As Schedler (2006: 14) notes, authoritarian elections ‘fail to display the procedural fairness and substantive uncertainty that makes democratic elections normatively acceptable, and they fail to offer the prospects of a government pro tempore losers may hope to replace after the next round of elections’ (for discussions on the characteristics of hybrid regimes, see Diamond, 2002; Levitsky and Way, 2002; Schedler, 2006, 2009).

not the outcome of regime breakdown, nor does it follow the path of negotiated transitions via elite pacts, as in fully closed regimes. Instead, since elections already involve some kind of plural but limited competition, democratic transitions are characterised by the gradual transformation from party systems with limited competition into fully competitive ones.

The differences between fully closed and competitive electoral authoritarian regimes with respect to older democracies are highly relevant for the comparative analysis of campaign change. Unlike long-established democracies (where the emergence of professionalised campaigning has generally been part of a more less gradual transition from mass-party organisations and labour-intensive campaign practices to electoralist, catch-all, or cartel models of party organisation, along with capital-intensive campaigning styles), modern campaign innovations in countries which have experienced democratic transitions from fully closed authoritarian regimes seem to have developed faster and almost in parallel to the establishment of democratic elections and institutions (Jakubowicz, 1996; Mickiewicz and Richter, 1996; Rospir, 1996; Espíndola, 2002, 2006).¹⁰

On the other hand, the professionalisation of campaigns in cases of democratic transition from competitive authoritarian regimes with open but unfair elections may be closer to the experience of established democracies. Unlike campaign professionalisation in countries democratising from fully closed authoritarian rule, campaign change in cases of democratisation from competitive authoritarianisms is not characterised by the sudden implementation – and subsequent further development – of the professional model of campaigning, but by a more or less

¹⁰ It seems that several newly emerging democracies in Latin America, Eastern and Central Europe, the former Soviet Union, Asia, and parts of Africa have experienced neither the mass-party organisational phase nor the processes of electoral dealignment characteristic of older, Western democracies. Moreover, the models of party organisation which have emerged in many of these restored or new democratic systems resemble catch-all rather than mass-party features. They are often characterised by the dominance of party leaders and a more flexible organisational structure. These tend to marginalise long-term party development and organisational aims (e.g. mass membership and partisan mobilisation, as well as other aspects of party-building), and focus more on vote-maximisation strategies and electoral mobilisation during election campaigns (Kopecky, 1995; Mainwaring and Scully, 1995; Lewis, 1996; Mair, 1997; Van Biezen, 2003b).

gradual transition from traditional and labour-intensive campaigning under the authoritarian period to capital- and media-intensive campaign practices more suitable to the new, fully competitive electoral market. Therefore, we may expect that a number of variables considered as significant predictors of campaign professionalisation in the literature based on Western democracies, such as socioeconomic modernisation and media and party system change, are also relevant explanatory factors driving professionalisation in cases of democratisation from competitive electoral authoritarian regimes. This is particularly true in systems which transited from dominant authoritarian to fully competitive party systems. However, we may expect a number of significant differences as well.

An Analytical Framework to Explain Campaign Professionalisation in Mexico

Most of the existing studies on contemporary changes in campaign practices in Latin America have built upon the concepts and categories developed in the literature on campaigns in the U.S. and Western Europe (Angell et al., 1992; Mayobre, 1996; Waisbord, 1996; Wallis, 2001; Rottinghaus and Alberro, 2005; Espíndola, 2006; de la Torre and Conaghan, 2009). Some authors have questioned the use of these approaches for explaining campaign change in the region's new democracies, however, and have instead developed their own theories and categories (Boas, 2010). Nevertheless, in this thesis I draw primarily upon the literature on the professionalisation of campaigns in advanced democracies (Farrell, 1996; Farrell and Webb, 2000; Gibson and Römmel, 2001; Smith, 2004, 2006; Negrine et al., 2007; Strömbäck, 2007, 2009), although I acknowledge that some of the extant concepts and analytical categories may require considerable adjustments in order to explain campaign change in the Latin-American context. Firstly, I deal with the conceptualisation of professionalisation as the outcome variable. Secondly, I establish the systemic and party-specific explanatory factors to be included in the analysis.

The dependent variable: campaign professionalisation

This thesis focuses on a number of professional campaign innovations in Mexican presidential elections that have occurred over the last two decades, especially in response to large-scale transformations in electoral and media environments, as the dependent variable. Thus, although I acknowledge that campaign professionalisation in any given country may be powerfully shaped by the diffusion of innovations in electioneering that first took place in the U.S., I believe that it is essentially

a process of adaptation to, and as such a necessary consequence of, changes in the political system on the one side and the media system on the other, and in the relationship of the two systems. These changes follow from the modernisation of society, which is a development that is still going on and will take place in similar political systems sooner or later. [...] Its actual appearance and the degree of professionalisation in a given country are however dependent on a country's specific social and political structures and processes (Holtz-Bacha, 2007: 63).

As with many other concepts in political communication, campaign professionalisation is not easy to define, for a number of reasons. One is because it refers to a quite complex and multidimensional process which 'encompasses a broad array of interrelated phenomena, ranging from the manner in which campaigns are conducted to the specialization of tasks' (Green and Smith, 2003: 322). Another reason is the changing and contingent nature of the process it describes. If professional campaign organisations are continuously adapting to structural changes in the political and the media systems, then we should acknowledge that what may be regarded as professional in the present might not be so in the future. In this sense, one comprehensive definition of professionalisation from the perspective of political parties is provided by Ralph Negrine, who writes that

the professionalisation of political communication can be deemed to be the process of adaptation by which they change their structures and practices in order to meet new and continually changing circumstances and their use of experts in order to achieve their goals [...] that, either explicitly or

implicitly, brings about a better and more efficient – and more reflective – organisation of resources and skills in order to achieve desired objectives'. It suggests a higher stage or development of – or an improvement on – what was on before. This could be in relation to the operation of communication facilities (a more skilful use of television), campaign techniques (better use of polling data or better targeting of voters, for example), the re-organisation of political parties themselves (as in centralisation), the reorganising of government communication systems (as in the creation of a centralised communications directorate to co-ordinate publicity) and even in respect of media-politics relations (as in news management techniques) (Negrine, 2007: 34-35).

Although useful, Negrine's definition needs further elaboration in order to establish the constitutive dimensions of the concept and the related indicators appropriate for systematic comparative analysis. As Gibson and Rommele point out:

[w]hile considerable attention has been devoted to defining the concept of the professionalized campaign [...] an explicit engagement with the methodological issues raised by this phenomenon has not been so common. In particular, the development of standardized empirical indicators to measure the dependent variable in question – professionalized campaigning – at the party and candidate level worldwide is significantly underdeveloped (Gibson and Römmele, 2009: 266).

Strömbäck (2009: 96) also argues that the concept of professionalised political campaigning is seldom defined in 'such a way as to allow for *systematic* comparisons across time, campaigns or countries' (see, for important exceptions, Herrnson, 1992; Denver and Hands, 1997, 2002; Denver et al., 2003).¹¹

¹¹ I argue that, since professionalisation refers to a highly context-dependent process of adapting campaign practices and strategies to structural changes in the electoral markets and media systems, it is not a concept that should establish a set of specific, necessary, and sufficient conditions, but a family-resemblance type based on substitutability of attributes (Goertz, 2006). Thus, while characteristics such as the use of consultants, opinion polling, and mass-media based campaign techniques could be seen as distinctive attributes of

In the present study, I focus on a number of relevant transformations in three key dimensions of the campaigning process, relating to the campaign organisation, research, and communication strategies of the three major Mexican parties from 1988 to 2006. For this purpose, I consider a professional campaign to be one that makes intensive use of technological innovations and media-based campaign tactics and strategies to reach voters, all of which are guided by market-research tools (e.g. a wide range of polling techniques, focus groups, issue- and opposition-research, etc.), and planned by expert professionals. These methods have displaced (or reduced), to a considerable degree, the relevance of more traditional campaign practices based on direct contact with voters and the extensive use of local workers and volunteers (see also Farrell, 1996; Smith, 2004, 2009). This definition is also quite consistent with the one provided by Strömbäck (2009: 97), that 'professionalised campaigning is characterised by being permanent, by the central campaign headquarters being able to coordinate the messages and management of the campaign and by using expertise in analyzing and reaching out to members and target groups [...] [and] by using expertise in news management and in analysing its own and the competitors' weaknesses and strengths'.

One of the central issues of this research is the assessment of cross-party differences in the level of campaign professionalism in Mexico. To accomplish this, I provide, in Chapters 7 and 8, detailed narratives on relevant changes and continuities in the main Mexican parties' campaign practices and communications over the last two decades. I also draw on previous studies in order to develop an 'Index of Professionalised Campaigning' suitable for the Mexican electoral and media

campaigning professionalisation, the use of some other techniques and tactics depends on their suitability for the particular electoral and institutional context in which campaign organisations compete. Hence, we should expect a reasonable degree of substitutability regarding the components of what could be considered professionalised campaigning across different countries. For example, the use of negative or attack advertising which is so common in the U.S. and Latin-American contexts is not equally appropriate in European multiparty systems, such as in Germany (Kaid and Holtz-Bacha, 1995). In a similar vein, it would not be accurate to claim that the use of paid political ads on TV in some Latin American countries like Argentina or Mexico, or the high financial costs associated with this practice, are proof that campaigning in these cases is more professionalised than in other Latin American (e.g. Brazil or Chile) or European countries in which paid political advertising is not allowed.

environments (see Gibson and Römmele, 2001; da Rocha Neto, 2007; Gibson and Römmele, 2009; Strömbäck, 2009; Moring et al., 2011).

Explanatory variables

One of the major advances in comparative research on the professionalisation of campaigning is the identification of several relevant variables influencing changes in campaign practices. The problem with the existing research on the professionalisation process is, however, that scholars have identified a considerable number of causal factors (Bowler and Farrell, 1992b; Farrell, 1996; Swanson and Mancini, 1996b; Norris, 2000, 2002; Plasser and Plasser, 2002; Negrine et al., 2007), without establishing which are more important than others (Holtz-Bacha, 2004). In order to clarify the type of influence brought to bear by the multitude of causal variables considered in the literature, it is useful to establish a primary distinction between party-specific variables and structural factors external to political parties as campaign organisations.

System-level variables

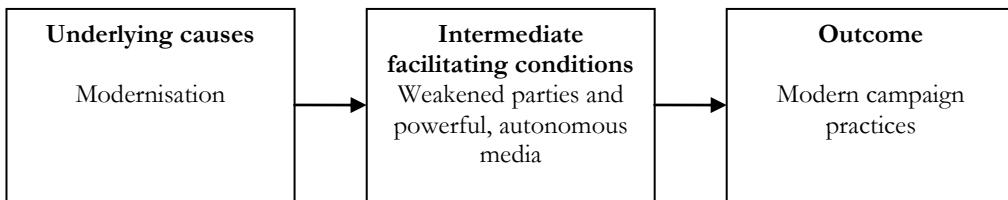
Systemic factors are present in most academic accounts of professionalisation. The argument that modern campaign innovations are a consequence of broader changes in the social, political, and media systems is undoubtedly true. However, it says little about the causal mechanisms linking structural conditions to professional campaign practices. One of the most ambitious theoretical clarifications of the role of structural changes on the rise of modern campaign practices is provided by Swanson and Mancini (1996) in the edited volume *Politics, Media, and Modern Democracy*.¹² The study compares electioneering trends in eleven countries so as to provide a more complete

¹² The cases selected comprise three groups of countries: those with long-established, consolidated, or stable democracies (i.e. with a stable political culture, such as the U.S., the U.K., Sweden, and Germany); those with new or recently restored democracies (e.g. Russia, Poland, and Spain); those which have recently experienced destabilising pressures, and can therefore be considered unstable democracies (e.g. Israel, Italy, Argentina, and Venezuela).

description of contemporary changes and innovations in electoral campaigning, and to assess the plausibility of the modernisation thesis vis-à-vis the Americanisation hypothesis explored in previous comparative studies (Bowler and Farrell, 1992a; Butler and Ranney, 1992; Kaid and Holtz-Bacha, 1995).

The findings of the research provide substantial evidence of a pattern of worldwide change and cross-country convergence in campaign practices, which can be related to five attributes of the new model of campaigning defined by Swanson and Mancini in the introductory essay of the study, involving the personalisation of politics, the scientificisation of politics, the detachment of parties from citizens (since opinion polls substitute for interpersonal contact), the development of more autonomous structures of communication, and the fact that the citizen becomes a spectator who follows the political spectacle. However, Swanson and Mancini question the idea of campaign convergence as the outcome of a process of Americanisation. Without denying the importance of the transference of U.S. campaign expertise, they stress the significance of endogenous structural factors in fostering campaign change. They argue that the 'elements of the modern campaign model have emerged as a response to internal developments in those countries, not out of desire to imitate the United States' (1996b: 249). Modernisation thus causes campaign change because it 'leads to a weakening of political parties and emergence of a powerful role for mass media. These conditions seem to be the immediate causes of changes in electoral practices, and thus mediate between modernization on the one hand and the modern model of campaigning on the other' (Swanson and Mancini, 1996b: 255) (see Figure 1).

Figure 1 The Modernisation Hypothesis



Based on Swanson and Mancini, 1996: 255

Most academic research on the professionalisation of campaigns in the U.S. and in Western European democracies seems to support the modernisation hypothesis. A number of studies stress the role of structural factors, such as societal modernisation, electoral and media system change, in the professionalisation of campaigns (Mair et al., 2004; Negrine et al., 2007). However, the role that social-structural changes and strategic behaviours have played in shaping campaign professionalisation is not so clear in cases other than in long-established Western democracies. The work of Swanson and Mancini is actually quite ambiguous in this regard. Based on case studies of countries that made sudden democratic transitions, such as Russia, Poland, and Spain, they conclude that in all these new democracies, the new model of campaigning was adopted as part of democratisation, in an effort to stimulate and accelerate 'more general modernization processes, rather than [function] as an outgrowth of them' (Swanson and Mancini, 1996b: 255).¹³

In spite of the evidence on the links between modernisation factors and campaign innovations set out by the authors, their findings remain quite problematic, since the *line of causation* is reversed with respect to their initial theoretical framework. That is, causality seems to flow from electoral innovations to modernisation processes, not the reverse. Their argument is inconclusive because they suggest that the role played by modernisation in the emergence of modern campaign practices is critical in both established and new democracies, but that 'the path

¹³ They refer to regional integration and/or economic development processes.

that leads from the former to the latter can take several different turns that represent important variations' (Swanson and Mancini, 1996b: 255).

Research on campaign change in cases of recent democratisation has also led some scholars to question the role of modernisation processes as the driving force behind transformations in electoral campaigning. For instance, building on his comparative analysis of election campaigning in East and Southeast Asia, Schafferer (2006) has pointed out that in emerging democracies the significance of modernisation processes varies substantially from case to case, and largely depends on the country-specific, pre-democratising context. He also suggests that in these countries the actions of political elites and consultants might have a more decisive role in explaining professionalisation trends:

Limited elections, a deeply rooted election culture, a fairly developed media system, and economic prosperity probably lead to a hybridization of US-style campaigning that is mainly driven by social and political changes. Third-world democracies, on the other hand, are more likely victims of the donor-driven involvement of overseas consultants. Modernization processes will probably play a neglecting role in bringing about US-style electoral campaigns there (Schafferer, 2006: 6-7).

Even so, despite its flaws, the modernisation hypothesis remains the most comprehensive theoretical framework of campaign change in old and new democracies. It is for this reason that, in order to understand how structural factors have driven the emergence of changes in campaign practices in the Mexican case, I build on the modernisation approach, as well as on the analytical distinctions established by Swanson and Mancini (1996b) between three different types of systemic variables: the 'underlying', the 'intermediate', and the 'mediating' conditions.

Underlying and intermediate causal conditions:

Modernisation, party system, and media system change

Many scholars contend that social-structural transformations, usually grouped under the umbrella term ‘modernisation’, are the underlying causes of the shift from traditional toward professionalised campaigning styles (Mancini and Swanson, 1996; Norris, 2000):¹⁴

Innovations in election campaigns over the last few years that resemble practices developed first in the United States result fundamentally, we believe, from transformations in the social structure and form of democracy in countries where the innovations have taken place. These transformations are part of the modernization process: The more advanced is the process of modernization in a country, the more likely we are to find innovations in campaigning being adopted and adapted (Mancini and Swanson, 1996: 6).

However, the fact that modernisation is constituted by several intertwined, systemic processes makes it difficult to know which of these factors does exactly what to change campaign practices. Scholars have argued that the concept of modernisation is quite problematic because it ‘lumps together many dimensions of change – technological, cultural, political, and economic – that need to be distinguished analytically if we are to be clear about the forces at work, even if we conclude in the end that these different dimensions are interrelated’ (Hallin and Mancini, 2004a: 28). Moreover, while some authors (Blumler, 1990; Swanson and Mancini, 1996b) define modernisation and its effects on campaigning in terms of the sociological literature, other scholars (Norris, 2000) seem to do it based on the literature on modernisation and post-modernisation in political science.

Although perspectives informed by both sociology and political science remain fairly related and compatible, in terms of operationalisation some structure-focused accounts of

¹⁴ The use of concepts like ‘modernisation’ to explain processes of political change is not new. For example, much of the literature on democratisation has demonstrated that modernisation is a decisive factor driving democratisation processes (so-called ‘modernisation theory’).

professionalisation provide a more precise specification of the constitutive dimensions of modernisation than others. For instance, Swanson and Mancini (1996a: 253) define modernisation as a process of increasing social complexity and functional differentiation which

leads to growing numbers of subsystems of all kinds that develop to satisfy the specialized demands of particular groups and social sectors. The rise of these subsystems undermines the traditional aggregative structures of socialization, authority, community, and consensus, producing social fragmentation and exclusion.

And so modernisation has considerable consequences for the political process, since

more and more specialized groups compete for public resources and social capital, as citizens deputize these groups to act as intermediaries between themselves and traditional political institutions. In turn, political parties tend to become segmented, pluralistic, catch-all confederations with weak or inconsistent ideological bases, whose links to voters are fragile and inherently unstable. In such a political context, individual political figures who can aggregate support around their personal appeal become empowered at the expense of the traditional authority of political parties (Swanson and Mancini, 1996: 253).

Similarly, Blumler (1990: 103) speaks of a 'general modernization of the publicity process', which he defines as 'a competitive struggle to influence and control popular perceptions of key political events and issues through the major mass media'. From this perspective, the 'underlying', independent variables of campaign innovations seem to be related to the increasing social, structural, and functional differentiations, alongside a profound transformation of the public sphere. The problem comes when we try to make operational these constitutive dimensions by establishing specific indicators associated with them. The modernisation approach seems to be more precise when identifying the immediate variables resulting from changes in social structures, which in turn foster transformations in campaign practices, such as the 'weakening of political parties', and the 'emergence of a powerful role for the mass media' (Swanson and Mancini, 1996b: 255) (see Figure

1). Nevertheless, the ‘weakening of parties’ and the ‘powerful role of the media’ seem to be still too abstract to be operationalised. While both factors seem to be instrumental in changes to the party systems, the latter seems to imply transformations in the media systems as well.

Other structure-focused accounts provide more precision in the identification of specific, underlying, and intermediate causal variables. For instance, Norris’ (2002) explanation of the professionalisation process draws on modernisation theory (Lerner, 1958; Lipset, 1960) and the literature on cultural change in political science (Inglehart, 1977, 1990, 1997). Structural transformations such as technological and socioeconomic developments, increasing literacy and education rates, and mass-media expansion and penetration, among other things, are thought to have profoundly influenced changes in the structure and behaviour of the electorate, particularly in the voter-party relationship, involving structural dealignment, weakening of party loyalties, changing value orientations, increased voters’ political sophistication, and volatility. This has, in turn, fostered political parties’ organisation and behaviour of the catch-all type, and supported campaign professionalism. In sum, like the modernisation approach, electoral- and party-change literatures consider structural factors to be the underlying forces behind changes in campaign practices, although they provide more precision when identifying specific underlying and intermediate causes of professionalisation.

The intermediate variables identified by both perspectives are also quite compatible, however, since the decline of parties and the more powerful role played by the media (as proposed by modernisation scholars) are both related to electoral change – the key intervening process suggested by party scholars. However, it should be noted that the ‘weakening of parties’ identified by the modernisation perspective seems to go beyond the decline of partisan identifications. It also implies an impact on attitudes and actions at the elite level, influencing a gradual decline in the control exercised by party organisations over key aspects and processes of elections, such as candidate selection and the allocation of campaign resources. The decline of parties’ control over

crucial aspects of electoral competition is important, since it has combined with the expansion and increasing complexity of the media to foster not only capital-intensive campaign practices but also personalised campaigning styles.¹⁵ For instance, extreme cases of party decline may lead to the rise of predominantly candidate-centred electoral practices like those in the U.S. (Nimmo, 1970; Agranoff, 1976b; Wattenberg, 1990, 1991, 1998; Trent and Friedenberg, 2008). In sum, according to the modernisation approach, parties and candidates have modified their campaign practices in response to changes in the party and media systems. Their responsive action usually involves a move from people- to media-intensive and poll-driven campaign practices.

In my analysis of professionalisation trends in the Mexican case I examine the relevance of transformations in Mexico's party and media systems as driving factors of change. The key changes in the Mexican electoral environment that lead parties to adapt their campaign strategies and communications are analysed in Chapter 4, and the role of transformations in the media environment in fostering campaign change is addressed in Chapter 5. Then, alongside a number of party-level factors, indicators of relevant changes in the party and media systems are included in the Qualitative Comparative Analysis of campaign professionalisation in Chapter 9.

Mediating variables

Advocates of the modernisation approach also stress the role of a third set of variables that shape campaign practices: 'contextual' or 'mediating' conditions (Bowler and Farrell, 1992a; Swanson and Mancini, 1996b; Norris, 2000; Plasser and Plasser, 2002). The significance of these systemic factors varies substantially across studies. Their influence nevertheless seems to be, more often than not, deemed secondary when compared to the causal role of the underlying and intermediate facilitating

¹⁵ On the one hand, the expansion of the media has increased the dependence of voters on them as a source of political information, and has decreased the dependence of citizens on parties as sources. On the other hand, media accessibility and new technologies have made candidates and party leaders less dependent on local party activism and organisational networks by enabling them to appeal directly to the electorate (Agranoff, 1976b; Mair, 1997). This has, in turn, continued to increase the phenomenon of party decline.

conditions in shaping changes in electioneering. Swanson and Mancini argue that some of these variables (e.g. the regulatory framework and the campaign regulations) do not cause or prevent campaign change, ‘but they may limit the particular forms and adaptations of modern methods that can be used effectively’ (Swanson and Mancini, 1996b: 19) (see also Farrell, 2005). Consequently, they are important because they mediate and contextualise the adoption and adaptation of modern global campaign trends, and thus account for much of the variance in campaign practices and styles across systems. Among such mediating (or contextualising) conditions are:

- **The level of development of the political consultancy industry**, which is related to the availability of professionals and experts from the media, advertising, marketing, and public relations industries – such as campaign managers, political consultants, advertisers, opinion pollsters and market researchers, etc. (Butler, 1996; Farrell, 1996; Friedenberg, 1997; Farrell et al., 2001).
- **The media system** (Hallin and Mancini, 2004b), its structure of ownership, control, and regulation (including whether broadcasting is based on a commercial or a public-service model), journalistic values, the culture of the news media (for instance, the contrast between partisan or ‘objective’ models of journalism), and audience patterns (newspaper-centric or television-centric systems) (Semetko, 1996; Norris, 2002).
- **The party system**, which refers to the system of party competition (dominant, two-party, moderate multi-party, or polarised multi-party system), and the related structure of competence (Mair, 1996, 1997, 2002).
- **The structure of the electorate and its patterns of voting behaviour**, including the level of electoral volatility and the influence of long-term predispositions (party ID and ideology) on voting decisions, when contrasted with the influence of short-term factors (candidates’ images, voters’ opinions on issues, etc.) (Dalton, 2002; Miller and Niemi, 2002).

- **The electoral system/regime**, where campaigning may be influenced by the type of electoral system (majority, proportional, or mixed), the type of ballot (open or closed list) (Blais and Massicotte, 2002), the sort of office (parliamentary or presidential), and several other factors, including the type and the frequency of elections, and whether they operate at local or national levels.
- **The regulatory environment**, involving the laws governing party and campaign funding (whether through public or private finance), state subsidies, campaign expenditures, and so on (Katz, 1996). Also, the laws governing political broadcasting, including rules about access to radio and TV for party broadcasts or ads, the purchase of paid commercial advertisements, the allocation and contents of free party political broadcasts, and the rules governing political balance in news coverage and campaign debates, publication of polls, etc. (Norris, 2002).

I consider that the view that legal-institutional variables only limit or contextualise the adoption of modern campaign practices is problematic. Some studies of campaign professionalisation in old and new democracies suggest that institutional and regulatory variables may play a crucial role in co-producing professional campaign innovations, as well as shaping changes in media and party systems.¹⁶ For instance, Susan Scarrow (2004) argues that campaign professionalisation in the

¹⁶ Some studies show that incentives given by different institutional and regulatory environments (electoral systems, access to paid television advertising) can lead to different campaign styles (Plasser and Plasser, 2002; Zittel and Gschwend, 2008), strongly suggesting that institutional and regulatory factors may play a more important role than the contextualising one argued by the modernisation perspective. For instance, the influence of political institutions on campaigning can be seen in the case of the United States, where amendments to the Federal Election Campaign Act in the 1970s tended to weaken the control and power of political parties over candidates and their campaigns (Alexander, 2005). These reforms gave incentives for new methods and styles of political communication based on marketing, and – particularly after the advent of radio and television – campaign tactics and strategies that tended to project a candidate's image and personality. This occluded other middle- or long-term voting factors and predispositions, such as values, ideology, and party identification, which in many instances were 'downplayed or even totally ignored' (Alexander, 2005: 8).

German case was not only driven by the availability of new communication technologies, but also by increases in public party funding. Most studies on campaign change in Mexico also stress the role of the emergence of closer electoral contestation and large-scale electoral reforms during democratisation, involving increases in public-party and campaign financing and their impact on the modernisation of political campaigns (Wallis, 2001; Langston, 2007; Langston and Benton, 2009). Similarly, one of the core arguments of this study is thus that ‘electoral institutions matter’ in fostering campaign professionalisation, particularly in countries which have experienced protracted transitions to democracy from some kind of competitive authoritarian regime, like Mexico. Following these studies, I contend that the impact of changes in the regulation of political financing and media access has been, perhaps, as significant as that of major transformations in the party and media systems in the professionalisation of Mexican electioneering. Chapter 6 thus devotes special attention to the role of a number of legal-institutional variables in the professionalisation of political campaigning in Mexico.

Party-level variables

Despite significant advances in the study of the role of systemic factors in shaping the process of campaign professionalisation, some scholars contend that the literature has given insufficient attention to important party-level factors influencing changes in campaign practices (Gibson and Römmele, 2001; Smith, 2006; Strömbäck, 2009). As Smith (2006) argues: ‘[t]hese changes may be driven by technological and (voter-)behavioral factors, but they are ultimately carried out by and

According to specialists in American politics and campaign finance (Alexander, 2005), changes in communication campaigns were not only due to technological change and the use of marketing techniques, but were also a consequence of the American presidential electoral system, which favours a particular type of candidate-and media-centred politics (see also Trent and Friedenberg, 2008). This system is quite different from the party-oriented politics of Western European countries and Canada, which are characterised by highly centralised party structures, and where the organisational resources and core functions of coordination, funding, and distribution of money basically rest on party committees rather than on the personal campaign committees of candidates (Alexander, 2005).

within [party] organizations [...] and may therefore be conditioned by internal, organizational variables as well as external, environmental ones' (Smith, 2006: 5). Party-specific factors are related to the parties' ideological outlook, and their organisational and resource capacities for adopting professional campaign innovations. While systemic variables explain much of the cross-country differences in campaign professionalisation, party-level variables are relevant because they explain much of the cross-partisan variation in campaigning styles within countries. Nevertheless, despite some important exceptions (Smith, 2006; Gibson and Römmelé, 2009; Strömbäck, 2009), there is still a relative lack of empirical research on the issue. Gibson and Römmelé (2001: 38-39) identify six key party-specific factors closely linked to the adoption of professionalised campaigning: 1) vote-seeking as a primary goal; 2) right-wing ideology; 3) hierarchical organisational structure; 4) high level of resources; 5) external shock (such as a heavy electoral defeat and/or loss of office); 6) change of party leadership.

It is important to note that, when contending that party organisations are not merely dependent but also independent variables of professionalisation, Gibson and Römmelé do not discount the role of environmental factors, or argue 'for parties to be seen as the only engines of [campaign] change' (2001: 35). Their aim is to stress the role of party agency by uncovering a series of party organisational dynamics and features that may facilitate or hinder the use of professionalised campaigning. Ultimately, party-specific factors cannot be attributed with an independent, causal effect, but party-agency impact is always combined with the influence of systemic conditions. In this sense, the main argument of this thesis is that neither structural changes nor party-level variables explain campaign change in Mexico per se; instead, it seems to be the result of an interaction between both types of causal conditions. The role of party-specific variables is analysed in chapters 9 and 10 of the thesis. The use of an analytical framework which distinguishes between different types of causal factors informs my research on change and continuity in Mexican campaign practices (see Figure 2). The aim is to shed light on the structural and party-level variables

that explain variation in the extent of campaign professionalism between the leading Mexican political parties.

Methodological Issues in Comparative Research on Campaign Change

Most research on campaign change conducted up to now has been qualitative rather than quantitative, and focused on few instead of many countries. What are the consequences of this for theory-building on campaign practices? What is the value of qualitative studies, which usually work with a small number of cases, to comparative research on election campaigns? Is it possible to generalise from the findings of qualitative, case-oriented research to other national or regional contexts? In a recent overview of the research on the issue, Holtz-Bacha (2004) has pointed out that some of the hypotheses commonly accepted in the literature on the professionalisation of campaigning cannot be supported, based on the results of the comparative studies conducted up until now. She concludes that the problem with the existing qualitative comparative research on the causes of campaign innovation is that

Studies that apply a comparative approach across countries have demonstrated which systemic variables are relevant. However, none of these studies has quantified the influence of the system variables. Therefore it is not possible to know which variables are more important and which are less important; how they relate to each other; and if they benefit or hinder the professionalization of campaigns. In this respect, a well-known problem of cross-national studies comes to bear, the fact that they usually work with a small number of cases. Nevertheless, because it is the aim of international comparisons to assess the validity of theoretical assumptions across systems, it is important to exceed the qualitative description of campaign communication and render possible a systematic and quantitative comparison (Holtz-Bacha, 2004: 227).

In a similar vein, Gibson and Rommele insist that

Empirical approaches to the topic have tended to focus on documenting the key changes to campaign practices over time within a single country, and/or implicit comparison within cross-nationally edited

volumes. [...] Such work has yielded a rich and in-depth understanding of the growth and development of these techniques in a wide variety of contexts. It has not, however, proved conducive to the type of large N comparative analysis that allows for more systematic investigation of campaign professionalization's causes and effects (Gibson and Römmelé, 2009: 266).

Certainly, the lack of studies utilising more systematic models to test which independent variables of campaign practices are more important than others is not a minor issue, especially if we take into account the considerable number of explanatory structural and party-level variables that have emerged from the literature. However, although I mostly agree with Holtz-Bacha and Gibson and Römmelé, I consider that the emphasis on theory-testing should be better placed on assessing more systematically the joint impact of system- and party-level variables in producing campaign change, rather than on estimating their net effects by quantitative means per se. I contend that more systematic, variable-oriented comparative research on campaign professionalisation should not only be based on statistical inference and techniques, but also on less conventional research methods, particularly those drawing on the logic of Boolean algebra, such as Qualitative Comparative Analysis (QCA), which have proved to be particularly useful for dealing with small-N data.

Therefore, although I acknowledge the limitations, in terms of theory-testing and generalisability, of few-countries comparisons and single-country studies, especially when set beside global comparative analyses, I regard all three types of comparative strategies as relevant and necessary for theory development on campaign change. Certainly, quantitative comparisons of many countries may be better suited to test which systemic factors are more relevant than others in shaping professionalisation. As Holtz-Bacha (2004) argues, '[s]everal [systemic] variables that influence the design of a campaign, and therefore have to be taken into account in the study of campaign communication, do not vary within a country, often not even over periods of time, but only between countries' (Holtz-Bacha, 2004: 217). On the other hand, few-countries comparisons

and single-country studies might shed light on how systemic and party-specific variables interact to foster (or hinder) changes in campaigning styles and practices. They might also confirm or deny the results of many-countries comparisons in specific domestic settings, and uncover the relevance of causal factors and mechanisms ignored or underestimated by large-N studies. Hence, comparative research on modern campaigning may benefit from a constant dialogue between quantitative variable-oriented and qualitative case-oriented comparative research (for more on the specific advantages and disadvantages of different types of comparative research designs, see Landman, 2008).

It could of course be argued that single-country studies on campaign professionalisation do not provide enough variation in terms of systemic causal conditions, and so can only focus on the effects of party-level factors on campaign practices. This option would require, of course, providing enough variation in terms of party-specific variables, for instance by including sufficient and diverse national parties in the sample (for examples of this type of research design, see Gibson and Römmele, 2009; Strömbäck, 2009; Moring et al., 2011). However, such an alternative might be highly susceptible to omitted-variable bias (King et al., 1994: 168), since it would not be possible to control the effects of such party-centred factors for other relevant systemic variables.¹⁷ Thus, the omission of structural factors might lead to an overestimation of the impact of party-level variables on the process of professionalisation. For this reason, single-country studies of professionalised campaigning should always make an effort to provide a sufficient amount of variation over time in terms of systemic and party-specific causal conditions, by including whenever possible more than one election period. I contend that either quantitative or qualitative research on campaign practices must always take into account the role of both systemic and party-specific factors on campaign

¹⁷ The problem of spuriousness or omitted-variable bias is explained by Landman: ‘the omission of key variables that may account for both the outcome and other explanatory factors already identified. A spurious explanation is one in which some unidentified factor is responsible for the outcome, while the identified factor is mistakenly attributed to having an effect on the outcome’ (Landman, 2008: 40).

continuity or change. The analysis of the causes of campaign professionalisation is not necessarily restricted to assessing which explanatory variables are more important than others, but can also describe the interactions between structural and party-level factors in promoting campaign professionalism.

Research methods

This case study combines qualitative fieldwork and Qualitative Comparative Analysis (QCA) in order to provide an overview of the process of campaign professionalisation and its causes. First, I present rich narratives describing significant changes in the causal conditions of campaign change at the systemic level (chapters 4-6). Chapters on the causal variables draw upon a wide range of data and evidence. For instance, the *Instituto Federal Electoral* (Federal Electoral Institute – IFE) and the *Centro de Estadística y Documentación Electoral* (Centre for Electoral Documentation and Statistics) of the *Universidad Autónoma Metropolitana* (Autonomous Metropolitan University – UAM) in Mexico City yielded the electoral data used in Chapter 4. The IFE also provided data on parties' electoral income and expenditures, considered in Chapter 6. The Ministry of the Interior and the *Banco de Información para la Investigación Aplicada en Ciencias Sociales* (Applied Social Science Research Data Repository — BIIACS) of the *Centro de Investigacion y Docencia Economicas* (Centre for Research and Teaching in Economics – CIDE) in Mexico City provided survey data for chapters 5 and 8. A number of diverse databases specialising in political parties and institutions in Mexico and Latin America were also consulted for further information, such as the *Observatory of Representative Institutions* of the *Universidad de Salamanca* (University of Salamanca – USAL) and the *Political Database of the Americas* of *Georgetown University*.

After analysing the causal, systemic conditions of campaign change, I focus on professionalised campaigning as the dependent variable (chapters 7 and 8). As with preceding chapters, I also provide detailed narratives of relevant changes in presidential campaign practices of the three leading parties from 1988 to 2006. Particular attention is devoted to relevant differences

between parties in terms of their level of use of professionalised campaigning techniques. The stories draw upon a variety of sources, including secondary literature and survey data, media reports and online news sources, party-produced information on the various aspects covered by the study, and field research in Mexico. From August to October 2009 and January to March 2010 I conducted a series of semi-structured interviews with a number of relevant political actors involved in the process of professionalisation, including former candidates, party officials, and consultants. The narratives were then used in the coding of the Index of Professionalised Campaigning. After that, QCA was used in order to test the impact of a number of structural and party-specific factors on the parties' level of campaign professionalisation (Chapter 9).

Conclusion

There are two main theoretical perspectives on contemporary processes of change and convergence in campaign practices across new and established democracies: the diffusion perspective and the modernisation approach. The former regards campaign professionalisation as an elite-driven process, and stresses the entrepreneurial role of political actors such as consultants, candidates, and campaign managers in changing electoral practices. Central to this perspective is the role of campaign professionals in the 'transnational diffusion and implementation of U.S. concepts and strategies of electoral campaigning' (Plasser and Plasser, 2002: 17). Changes in campaign tactics and strategies are explained by the actions of consultants 'exporting their strategic know-how to foreign contexts by supply- or demand-driven consultancy activities' on the one hand (Plasser and Plasser, 2002: 17), and the actions of political elites and parties importing and adapting such tactics, strategies, and techniques to their respective countries on the other. In sum, the diffusion approach is an action-focused approach, since it stresses the agency of campaign experts and political elites that make campaign change happen. Diffusionist accounts of campaign change enhance our understanding of the professionalisation process by providing thick descriptions and narratives, which help to clarify how modern campaign practices emerge. However, they usually fail to explain

why campaign innovations come about, an understanding which would require identifying the linkages that tie elites' actions to the broader structural conditions that make them occur.

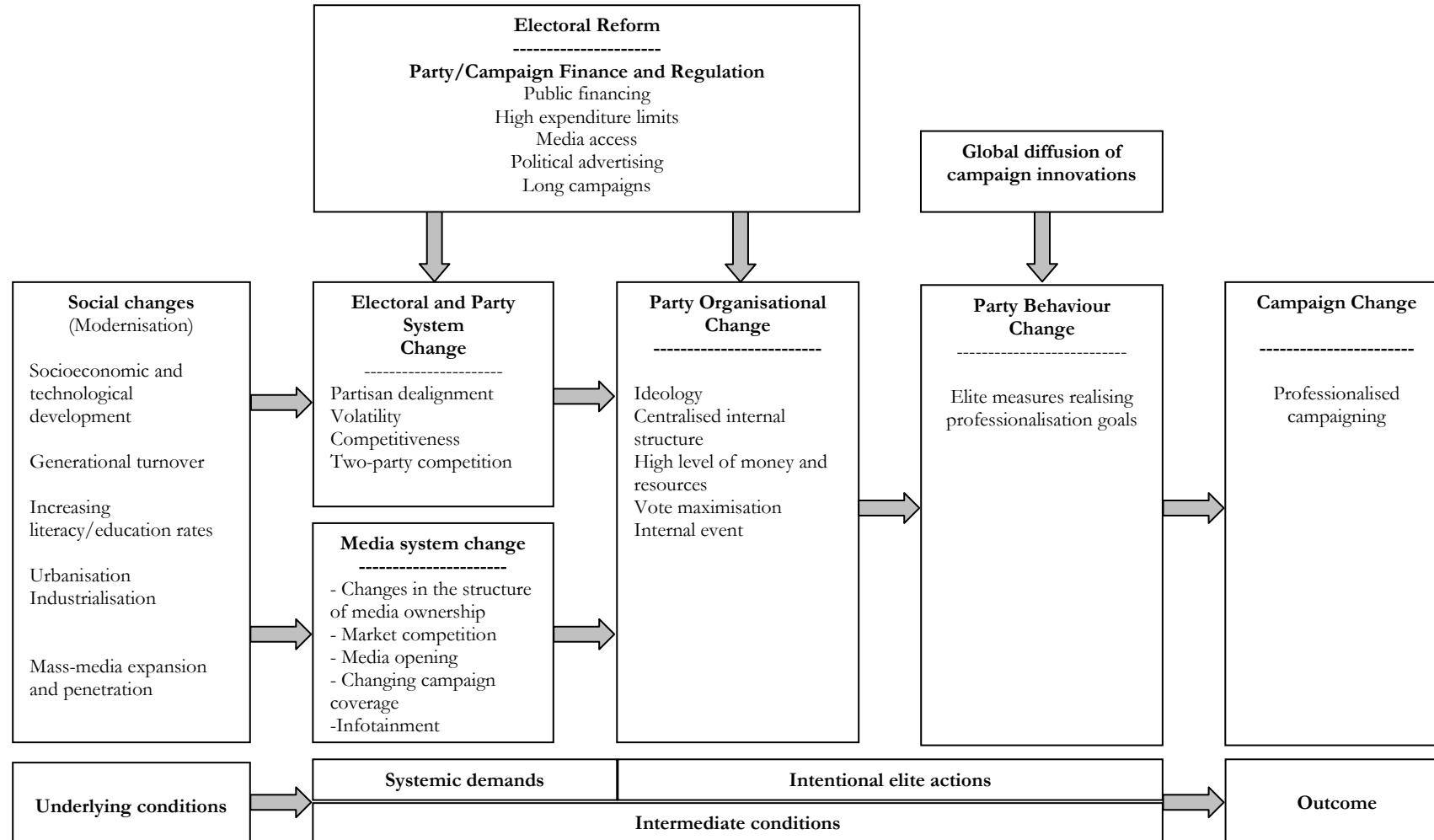
Structure-focused approaches, such as the modernisation perspective and most of the literature on party change, interpret such conditions. Their proponents challenge the early diffusion studies, which regard observed worldwide patterns of change in campaigning resembling the U.S. style of electioneering to be the result of the exporting of American techniques and strategies of 'Americanisation'. Structure-focused approaches hold that explaining campaign change requires a far more country-specific contextualisation than the Americanisation thesis allows. Structure-focused writers emphasise the role of endogenous changes in structural aspects of society involving socioeconomic and technological development, increasing education rates, urbanisation, and mass-media expansion and penetration, among others, in changing electoral practices. Studies based on this perspective tend to see campaign innovations as parties' strategic and adaptive responses to changes in their respective electoral and media environments.¹⁸

However, as action-focused perspectives, they also have some important limitations. A common criticism of structure-focused accounts of campaign professionalisation is that they tend to downplay the role of a number of internal party organisational features that may promote or impede – even prevent – campaign change (Gibson and Römmele, 2001; Smith, 2006). The point is that systemic changes cannot in themselves bring about professional campaign innovations, since this also requires a substantial degree of party agency. For this reason, this thesis includes both systemic and party-level factors in the analysis of the professionalisation of Mexican presidential campaigns. I consider that the inclusion of party-specific variables will enhance our understanding of the mechanisms by which structural changes translated into the political actors' behaviours making

¹⁸ Perhaps the difference between both approaches is that while the party-change literature emphasises the role of changes in the electoral markets (patterns of voting behaviour, the voter-party relationship, party systems, etc.), the modernisation approach, closer to communication studies, highlights the role of changes in media systems (technological change, media expansion, and media-party relationships).

possible the adoption of professional campaign innovations. I believe that the key question in the study on campaign professionalisation is not which variables are more important and which are less important, but understanding how systemic incentives interact within the constraints and opportunities posed by party-specific conditions in promoting or preventing professionalised campaigning.

Figure 2 The Process of Campaign Change in Mexico



3 Democratisation as the Background of Campaign Professionalisation

If political communication is being transformed, this cannot be understood without reference to the collapse of the old political order

(Hallin and Mancini, 2004b: 29)

Introduction

Understanding campaign change in developing democracies requires considering it as closely related to the emergence of democracy itself, and the factors that made it possible. The Mexican political system and its democratic transformation have been the subject of numerous analyses, and the literature is too broad to be reviewed here in any systematic fashion. My objective, instead, is to provide a brief background to some of the key factors behind the rise and sustainment of one of the world's most enduring authoritarian regimes, and explain a number of its key features and the factors that led to its collapse. Particular attention is dedicated to the evidence of the influence of socio-structural modernisation, economic liberalisation, and institutional change (electoral reforms) on the rise of electoral competitiveness.

Scholars of Mexican politics tend to agree that the Mexican transition to democracy differed significantly from the elite-pact model of transitions described in the early action-focused democratisation literature (e.g. O'Donnell and Schmitter, 1986; Przeworski, 1991). Perhaps the main difference in the Mexican transition was its departure point, since for the most part of the last century Mexican politics was characterised by what comparative politics scholars have termed an 'electoral authoritarian' (Schedler, 2006, 2009), 'competitive authoritarian' (Levitsky and Way, 2002), or 'hybrid' regime (Diamond, 2002), led by the

Institutional Revolutionary Party (PRI).¹⁹ Levitski and Way (2010a: 5) define competitive authoritarian regimes as

civilian regimes in which formal democratic institutions exist and are widely viewed as the primary means of gaining power, but in which incumbents' abuse of the state places them at a significant advantage vis-à-vis their opponents. Such regimes are competitive in that opposition parties use democratic institutions to contest seriously for power, but they are not democratic because the playing field is heavily skewed in favor of incumbents. Competition is thus real but unfair.

The Mexican electoral autocracy was one of several 'dominant party authoritarian regimes' (DPAR), which are a subset of competitive authoritarian regimes (Greene, 2007). As Greene argues (2007: 15), '[a]ll DPARs are competitive authoritarian regimes, but not all competitive authoritarian regimes have dominant parties. To be considered dominant, incumbents must also surpass power and longevity thresholds'. Following Greene, I regard dominant party authoritarian systems as competitive authoritarian regimes with 'continuous executive and legislative rule by a single party for at least 20 years or at least four consecutive elections' (Greene, 2007: 12). Hence, the Mexican case could be regarded as the best example of this subtype of hybrid regime, since the PRI dominated the politico-electoral arena for more than 70 years. Following its inception in 1929, it won every gubernatorial election until 1989, held the majority in Congress until 1997, and won every presidential election until 2000.

The emergence of Mexico's dominant party authoritarian regime can be better understood in the context of the political conflict and instability of the early post-revolutionary period. The Mexican Revolution is often regarded as a critical event in the country's history. It started in 1910, with an armed rebellion led by Francisco I. Madero to overthrow the dictatorship of Porfirio Díaz (1876-1911), but it eventually evolved into a multi-sided civil war

¹⁹ For a review of the main characteristics of electoral authoritarianism, see Schedler (2006, 2009) and Levitski and Way (2010a).

involving a wide range of competing factions. Large-scale, internal armed conflict lasted until around the early 1920s; even then, political violence and instability did not come to an end until late in that decade. After the assassination of president-elect Álvaro Obregón in 1928, the revolutionary elite, headed by President Plutarco Elías Calles, came to realise the need to bring together the regional and local victorious factions of the revolution under an official, single-party label. This was necessary in order to end the violent struggles between them, and provide more institutionalised ways of selecting national and local political leaders and representatives (Handelman, 1997).

The creation of the *Partido Nacional Revolucionario* (National Revolutionary Party – PNR) in 1929 proved to be successful in this regard, not only as a way to control regional and local political elites, but also to facilitate a state-building mechanism that allowed for sustained political stability and civilian rule (Garrido, 1982). Subsequently, under the presidency of Lazaro Cárdenas (1934-1940) the official party changed its name to the *Partido de la Revolución Mexicana* (Party of the Mexican Revolution – PRM), and adopted a socialist policy agenda, as well as a corporatist organisational structure with strong ties to organised labour and a wide range of peasant organisations (Collier, 1992).

Over time, the state party evolved into a large, pork-barrelling political machine with a hierarchical organisational culture and structure, and a quite flexible ideological and programmatic agenda. The almost unrestricted access to governmental resources for partisan ends allowed the PRI to mobilise broad electoral support across social classes, sectors, regions, and the left-right ideological spectrum, allowing it to back the objectives of the president in office. Unlike other instances of authoritarian rule, the PRI-led regime allowed for periodic elections, judicial and legislative (congressional) branches of government, opposition parties, and other allegedly liberal-democratic institutions.

Opposition parties were nevertheless allowed only a marginal role in the political party system, particularly in the lower house of Congress and at the municipal level. Most of them

were, in fact, small, left-wing satellite parties that acted as part of the regime's liberal façade, rather than as real challengers to the PRI's dominance. The only consistent exception was the conservative, right-wing *Partido Acción Nacional* (National Action Party – PAN). It was founded in 1939 by a group of Catholic activists, businessmen, and professionals who opposed many of the secular, corporatist, and socialist policies of President Lazaro Cárdenas (Loaeza, 1999; Mizrahi, 2003; Shirk, 2005). Despite its limited support base and vote share, the PAN remained the only significant challenger to the PRI until the emergence of the *Partido de la Revolución Democrática* (Party of the Democratic Revolution – PRD) (see Table 2).

The PRD's origins date back to 1986, when Cuauhtémoc Cárdenas (son of President Lazaro Cárdenas) and other prominent members of the ruling party formed the *Corriente Democrática* (Democratic Current), an internal PRI faction that criticised the economic adjustment policies of President Miguel de la Madrid's administration (1982-1988), particularly cuts in social spending to allow for increased foreign debt repayments. Later on, Cárdenas and the other members of the Democratic current were ousted from the PRI, after he and his colleagues demanded a more democratic procedure to select the party's presidential candidate.²⁰ In 1987, they formed a coalition of small, left-wing parties called the *Frente Democrático Nacional* (National Democratic Front – FDN) intended to compete in the 1988 federal election, with Cárdenas as its presidential candidate. The new party became the dominant force of the Mexican left, and the strongest electoral competitor the ruling party had ever faced. After a controversial election that was marred by fraud, Cárdenas officially received 31 percent of the vote. This was the highest percentage ever obtained by an opposition presidential candidate. One year later (May 5, 1989), Cárdenas and other prominent left-wing/center-left leaders and politicians founded the PRD (Bruhn, 1997).

²⁰ Until 2000, presidential candidates of the ruling PRI were hand-picked by the president of the republic.

The Factors behind Single-party Dominance

An uneven electoral playing field

Alongside regularly-scheduled elections and systematic violations to civil liberties, an uneven playing field is one core characteristic of competitive authoritarian regimes since it may ‘enable autocratic incumbents to retain power without resorting to the kinds of blatant abuse that can threaten their international standing’ (Levitsky and Way, 2010a: 57). Levitsky and Way define a skewed political playing field as ‘one in which incumbent abuse of the state generates such disparities in access to resources, media, or state institutions that opposition parties’ ability to organize and compete for national office is seriously impaired’ (2010b: 57).

For many decades, the Mexico’s dominant party owed much of its electoral success and longevity in power to the legitimacy conferred by its revolutionary heritage, but also to its economic performance. At least until the 1970s, the PRI’s public policies provided rapid and sustained economic growth, alongside relative welfare and social security to the country, measures which had traditionally accounted for much of the dominant party’s broad electoral support. However, the PRI continued to win elections, even in the context of severe economic crises and increasing voter dissatisfaction with its economic performance. The PRI’s electoral success in such circumstances was possibly due to four factors which reinforced themselves, sustaining what could be regarded as a ‘dominant party equilibrium’ (Greene, 2007) or a ‘cycle of limited electoral competitiveness’ (Méndez de Hoyos, 2006).

- 1) **Uneven access to resources.** The Mexican electoral market was characterised by dominant party hyper-incumbency advantages primarily obtained from diverting public funds for electoral use (Greene, 2007). These advantages resulted in massive asymmetries between the ruling party’s resources and those of the opposition parties. Such disparities were possible because of a) a large public sector; b) the PRI’s continuing incumbency status, as it held most of the executive branches at the federal,

state, and local levels, thus providing the ruling-party elites access to substantial governmental resources to finance their campaign and party-building efforts; c) the unrestricted use of such public resources for electoral purposes, due to an extensive and politically permissive public bureaucracy and the lack of an independent electoral management body with effective oversight and sanction functions (Klesner, 2005; Greene, 2007). As a result, PRI candidates were able to systematically skew electoral competition in their favour, significantly outspending competitors not only during election campaigns, but also in all aspects of party-development (Greene, 2007). Public resources resulted in patronage goods, and were funnelled through the party's corporatist and territorial structures and vast clientelist networks, which allowed the formerly dominant party to mobilise the electorate (Cornelius, 2004; Greene, 2007) and offer significant selective incentives (usually material rewards and political posts) to political leaders, in return for the electoral support of those social groups they claimed to represent (Klesner, 2005).²¹ Asymmetric resources contributed to the cycle of limited electoral competitiveness, since opposition parties' failure to gain any executive positions deprived them of important resources with which to reward their members and supporters, making them unable to challenge the PRI's electoral dominance (Klesner, 2005; Greene, 2007).

- 2) **Targeted repression.** The PRI's capacity to raise the costs for activists and politicians to join the opposition parties, by denying them the aforementioned patronage goods. Or else, when the PRI's patronage system failed, by levying repressive measures against opposition activists and members (Greene, 2007).
- 3) **Uneven access to the media.** As many other relevant sectors of society, most of print and broadcast media entrepreneurs were also part of the regime's patronage system,

²¹ The PRI's dominance was also possibly due to its corporatist structure, which funnelled the electoral and other forms of political participation of Mexico's peasants and unionised workers.

and, like pro-regime businessmen in general, they benefited substantially from the government's politicized distribution of state resources, licenses, and concessions. Thus, the PRI's financial and media advantages denied opposition parties anything close to an even footing. (Lawson, 2002; Hughes, 2006). Levitsky and Way note that authoritarian incumbents' media advantages may take several forms. 'Frequently the most important disparities exist in access to broadcast media, combined with biased and partisan coverage (2010a: 11). In Mexico, for instance, several studies demonstrated massive asymmetries in news coverage between PRI and opposition candidates during election campaigns in the late 1980s and the early 1990s (Arredondo Ramírez et al., 1991; Acosta Valverde and Parra Rosales, 1995; Aguayo and Acosta, 1997; Trejo Delarbre, 2001; Lawson, 2002; Hughes, 2006).

- 4) **Uneven access to the law.** A number of studies also stress the role of legal-institutional advantages in sustaining the PRI's electoral dominance (Molinar, 1991b; Becerra et al., 2000; Méndez de Hoyos, 2006). The legal mechanisms and rules that limited opposition parties' competitiveness involved a) a highly politicised governmental model of electoral management. Elections were organised and validated by the executive branch through the *Secretaria de Gobernacion* (Ministry of the Interior). This limited opposition parties' opportunity to scrutinise the administration of elections (Méndez de Hoyos, 2006). Such a model also made it easier to organise and commit electoral fraud when other ruling-party advantages failed, helping the PRI to remain in power. Alongside the lack of a professionalised public bureaucracy, which might block access to public resources for electoral use (Greene, 2007), the absence of an independent and autonomous electoral management body with effective oversight and sanctioning authority to prevent the use of public resources for electoral purposes also contributed to reinforce dominant party incumbency advantages; b) the process of party registration, which was led by the Minister of the Interior, who, as a president

of the top decision-making electoral body, enjoyed discretionary powers to decide whether or not parties could be registered (Méndez de Hoyos, 2006); c) the first-past-the-post electoral system, which made it extremely difficult for opposition parties to win executive positions and seats. Besides, the electoral formula allowed an over-representation of the ruling party, and under-representation of opposition parties (see Molinar, 1991b; Valdés Zurita, 1995a; Molinar, 1996; Becerra et al., 2000).

The Factors behind Democratisation

Modernisation, Economic and Electoral Reforms, and Opposition Party Strategies

In spite of the academic debates on the various factors driving Mexican transition to democracy (socioeconomic modernisation, international pressure, economic liberalisation, institutional change, opposition party strategies), most studies on the Mexican transition tend to regard electoral change as central to the democratisation process (Molinar, 1991b; Becerra et al., 2000; Beer, 2003; Merino, 2003; Eisenstadt, 2004; Méndez de Hoyos, 2006; Greene, 2007; Levitsky and Way, 2010a). It is almost undisputed that the emergence of electoral competition fostered democratic features and institutions which resemble those of established democracies, involving effective separation of powers, divided governments, the increasingly marked role of Congress vis à vis the executive in the policymaking process, greater checks on the executive's prerogatives, etc. As Beer argues (2003: 10), 'the existence of regularly scheduled elections in Mexico, even though they were often not free and fair, had important consequences for the process of democratization'. Most studies agree that explaining Mexican transition to electoral democracy involves uncovering the factors underlying electoral change, and understanding the move from a dominant to a fully competitive party system. However, there is still substantial disagreement on what these factors are.

The rise of electoral competitiveness is, in part, explained by socioeconomic modernisation during the post-war period. Although the substantial socioeconomic

development provided by the PRI's public policy explains much of its electoral success, paradoxically it has also had major consequences for the ruling party's dominance by gradually eroding the party's traditional rural bases of social support. Socioeconomic modernisation also provided the foundations for a more complex and pluralistic society by fostering the growth of more urban, better-educated, and middle-class sectors of the population, which eventually constituted the social bases of opposition parties' support. A number of analyses on voting behaviour using aggregate electoral data at the state (Ames, 1970; Ramos Oranday, 1985; Klesner, 1987; Méndez de Hoyos, 2006), district (Molinar and Weldon, 1990; Klesner, 1993, 1994, 1995), and municipal levels (Klesner, 2005) provide evidence on the key role played by socioeconomic modernisation factors, including urbanisation, industrialisation, education, and income, to explain increasing support for opposition parties. Modernisation-related factors were some of the main inspirations of growing electoral competitiveness in the 1950s, 1960s, and 1970s, and their effects resulted in the gradual trend of PRI's electoral decline. However, this decline accelerated in the 1980s and the 1990s as a result of factors other than those related to socioeconomic modernisation, such as the major policy failures that resulted in severe economic crisis in the mid-1980s and mid-1990s, and major electoral reforms in the 1990s.²²

Studies on economic voting indicate that retrospective evaluations by the Mexican electorate shaped Mexicans' voting intentions in the 1990s (Magaloni, 1999; Poiré, 1999; Buendía, 2004). Nevertheless, these studies also show that, although voters' retrospective evaluations were significant predictors of voting behaviour, their impact was not as strong as

²² Méndez de Hoyos (2006) provided evidence of a positive association between quantitative measures of the degree of fairness of electoral reforms and competitiveness, even after controlling by socioeconomic modernisation factors. Her analysis shows that although socioeconomic modernisation factors were significant predictors of electoral competitiveness in the elections from 1979 to 1991, their significance as explanatory variables of electoral competitiveness diminished from 1994 onwards. This suggests that, in spite of its salience during the 1980s and 1990s, the impact of modernisation is not enough to explain the accelerated decline of the PRI during this period.

in established democracies. According to the literature on retrospective economic voting (Fiorina, 1981), incumbents lose office because of voters' dissatisfaction with their economic performance. However, in Mexico the PRI survived a profound economic crisis in the mid-1980s. In fact, studies based on surveys carried out during the late 1980s and early 1990s show that voting intentions for the PRI remained high even among those who expressed most dissatisfaction with the ruling party's economic performance (Domínguez and McCann, 1996; Buendía, 2004; Magaloni, 2006). According to a 1986 *New York Times* poll, 89 percent of respondents said that the national economy's performance was bad or very bad. Similarly, when looking at egotropic retrospective evaluations, 59 percent of voters considered their personal finances to be bad or very bad. However, 45 percent of these voters still identified with the ruling party.

This pattern was confirmed two years later by a Gallup survey, which showed that 46 percent of voters thought that their personal economic situation was bad, but that 50 percent of them still planned to vote for the PRI's presidential candidate. This tendency was no different in the case of sociotropic economic evaluations, since 75 percent of respondents considered the country's economic performance to be bad, but 52 percent of them still wanted to vote for the PRI (Domínguez and McCann, 1996). Buendía (2004) shows that the trend remained similar during the 1990s. 57.2 percent of voters who held retrospective egotropic economic evaluations still planned to vote for the PRI in 1991, 43.2 percent in 1994, and 33.1 percent in 1997. His analysis also indicates that the outcome was almost the same when looking at the relationship between voting intentions and retrospective sociotropic evaluations. Magaloni's (2006) study also echoes these findings.

Two different but complementary explanations have been proposed for the gradual decline of the dominant party in the face of continuous economic crises. The first one focuses on the role of voters in ending party rule, and draws on a modified model of retrospective voting behaviour. According to Magaloni (2006), the PRI was able to survive in spite of its poor

economic performance in the 1980s because voters' accumulated life experiences – through the many years of economic stability and growth – mitigated the negative evaluations of the PRI's poor economic management. Thus, younger voters tended to turn away from the PRI faster than older ones simply because they had not experienced a longer period of economic growth and stability under dominant party rule. In contrast, older voters tended to weigh all those years of development against the more recent years of poor economic management, resulting in a more gradual turning away from the PRI. In contrast to prospective economic voting theories, which argue that economic crises also provide strong incentives to vote for the opposition, the revised model stresses the role of voters' risk aversion in sustaining the PRI's dominance. Voters in Mexico tended to fear opposition rule because they lacked enough information on the performance of opposition parties in office. This lack of information also negatively affected the credibility of the PAN and the PRD in terms of prospective policy offers. Noting this, Magaloni argues that the PRI's electoral dominance diminished only after the subsequent economic crisis in the mid-1990s, once the retrospective weight of many years of economic stability had tended to fade off, and voters had become more likely to take their chances and vote for the opposition.

An alternative explanation, which emphasises the role of opposition party elites and their strategies, is that the transformation of opposition parties from niche or sectarian into catch-all parties propelled the dramatic rise of electoral competitiveness during the 1990s and the end of the PRI's dominance (Greene, 2007). According to this theory, economic crises and the subsequent response in the form of economic liberalisation fostered the PRI's decline. Whereas during the 1980s the dominant party still enjoyed significant incumbency advantages, related to access to massive governmental resources (and their use for electoral purposes), the situation changed substantially in the 1990s as a result of market-oriented reforms. The privatisation of formerly state-owned enterprises deprived the PRI of important sources of patronage to buy back voters' support and undermine opposition parties' competitiveness.

However, even when the dominant party's incumbency advantages faded, and it faced increasing voter dissatisfaction with its economic performance, voters were still reluctant to vote for the opposition. The first explanation suggests that this was due to voters' fears, based on uncertainties about opposition rule; this second perspective looks at the failures of opposition parties to respond to a changing and more competitive electoral market. According to this theory, the PRI's imminent demise was severely delayed not only due to structural factors, but also because of the opposition parties' limited organisational and electoral mobilisation capacity to expand their limited bases of support. They could not exploit the expansion of the electoral market as a result of the dealignment of the Mexican electorate from the PRI, nor capitalise on the reduction of the magnitude of the dominant party's resource advantages due to economic and politico-institutional changes (Greene, 2007).²³

Both the PAN and the PRD were highly constrained by their origins as small, niche organisations characterised by 'tight links to core constituencies and high barriers to new activist affiliation' (Greene, 2007: 208).²⁴ These organisational models played a key role in the opposition parties' development and survival in an extremely adverse electoral context, characterised by massive resource asymmetries between them and the PRI, and by targeted repression. However, they 'were poorly designed for innovation' (Greene, 2007: 208), and

²³ Particularly relevant changes were the privatisation of public enterprises and other market-oriented reforms of the administrations of presidents Miguel de la Madrid (1982-1988) and Carlos Salinas (1988-1994). Politico-electoral reforms of the 1990-96 period that increased public party and campaign funding provided more equitable access to the mass media, establishing spending limits, reporting requirements, and prohibitions and sanctions against the use of public resources for electoral purposes, etc.

²⁴ According to Greene (2007), opposition parties established high barriers to the affiliation of new members, either through formal or informal recruitment rules, a strategy aimed at recruiting only loyal and highly ideologically committed activists. These 'quality rather than quantity' recruitment procedures were instituted by opposition elites and activists 'who joined opposition parties in their early stages, when the dominant party's resource advantages and use of repression were significant', and served a number of important aims. For instance, they prevented co-opting by the dominant party and the infiltration of political opportunists, and protected the scarce resources that opposition parties could generate for its members. Niche models of party organisation 'were an important ingredient in crafting opposition parties that were strictly distinguished from the dominant party and populated by hard core activists who were more likely to remain active despite high costs and low benefits' (Greene, 2007: 208).

highly ineffective in generating the organisational changes required to take advantage of increasing voters' detachment from the PRI (for a similar argument on the PAN, see: Mizrahi, 2003).²⁵ Thus, although the electoral dynamics related to the process of electoral dealignment provided 'powerful incentives to the development of catch-all parties' (Klesner, 2005: 135), opposition parties' catch-all transformation has not been easy, nor come without substantial internal tensions. In fact, Greene (2007: 208) shows that it was a 'slow and halting' process that occurred only after a major shift in their internal recruitment dynamics. As the PRI incumbency advantages diminished, and elections became fairer and more competitive, opposition parties turned out to be increasingly attractive to more moderate and pragmatic leaders and activists, who could transform them into catch-all parties able to appeal to and mobilise a broader available electorate, and so challenge the PRI's electoral dominance. In sum, although this perspective regards that opposition party-building and electoral capacity were ultimately determined by structural factors (e.g. economic liberalisation, which substantially diminished the dominant party's incumbency advantages), it also suggests that opposition parties' transformation from niche to catch-all models of party organisation and behaviour played an important role in fostering electoral competitiveness and the democratisation process (Greene, 2007).²⁶

²⁵ Similarly, Mizrahi (2003) argues that the PAN was a sectarian party that 'institutionalized a set of internal rules designed to preserve its central ideological principles and safeguard it against political opportunists. While these rules allowed the party to survive as an independent opposition party in a non-competitive regime, they became a source of weakness as the electoral environment became more competitive [...] [these] rules restrain the growth of party militants, curtail the party's flexibility to respond effectively to a changing and more demanding electorate, and hinder the PAN's entrenchment among broader sections of the population' (2003: 52).

²⁶ Perhaps because the Mexican transition to democracy was characterised by the absence of key explanatory features described by the early action-focused approaches to democratisation (e.g. clear regime breakdown, elite pacts, etc.), scholars tend to exclude agency factors from their analyses, and believe that it is more appropriate to focus on the structural and institutional variables underlying electoral – and hence political – change. A newer current of work has reconsidered the role of party agency in the democratisation process by focusing on factors such as opposition party strategies (e.g. opposition-party led mass mobilisation) in pressing for change, and adapting to electoral competition (Gomez Lopez, 2003; Eisenstadt, 2004; Greene, 2007).

Finally, a number of studies have focused on the role of electoral reforms in fostering electoral change (Molinar, 1991b; Becerra et al., 2000; Merino, 2003; Méndez de Hoyos, 2006). The electoral reforms that took place during the 1990s as a result of negotiations between the PRI and major opposition parties levelled the electoral playing field: reducing the extent of the dominant party's institutional advantages on the one hand, and providing opposition parties with important resources for competing against the PRI on the other. They provided more openness, fairness, and transparency to the electoral process by introducing, among other features: a) changes in the electoral system, from a plurality to a mixed system (with an important component of proportionality); b) changes in the electoral administration, from a government-controlled to a more autonomous and independent model which improved the integrity and credibility of the voting and vote-counting processes; c) changes in the rules of party and campaign financing and parties' access to the mass media, which provided opposition parties with substantial increases in public financing (see Chapter 6 on changes in the regulatory framework).

Conclusion

Over the last two decades of the 20th century, Mexican politics moved from a dominant party authoritarian regime under PRI rule to a fully competitive multiparty democracy. Mexican transition to democracy was a long and protracted process, driven by a number of mutually reinforcing factors involving socioeconomic modernisation, international pressure, economic liberalisation, institutional change, and opposition party strategies. Therefore, there is still considerable disagreement among scholars of Mexican politics on which causal conditions were more important than others in shaping democratisation (Eisenstadt, 2004; Magaloni, 2006; Méndez de Hoyos, 2006; Greene, 2007; Levitsky and Way, 2010a). And so, although most studies on Mexican democratisation tend to emphasise the role of one established factor over others, the complex interaction effects of modernisation and institutional and economic conditions on the process of politico-electoral change could be expected. However, most

specialists agree that the electoral arena was the key playground of the Mexican transition. The next chapter will then focus on the rise of party competition and a number of dimensions of change in the structure and behaviour of the Mexican electorate. Building on the work of Levitski and Way (Levitsky and Way, 2010a:b), I will then review, in Chapters 5 and 6, the relevant transformations in two relevant dimensions of the Mexican uneven electoral playing field: access to resources and to the media.

4 Electoral and Party System Change and Campaign Professionalisation

Introduction

Comparative studies on profound societal and electoral change in Western European democracies usually refer to campaign professionalisation as one of the available responses of party organisations to such change (Dalton and Wattenberg, 2000a; Mair et al., 2004). These analyses usually argue that socio-economic and technological developments and media expansion in advanced societies have contributed to a process of ‘cognitive mobilisation’ responsible for increasing voters’ overall levels of political sophistication.²⁷ As a result, ‘more citizens in advanced industrial societies have the political skills and resources that prepare them to deal with the complexities of politics and to reach their own political decisions’ (Dalton, 2008: 21).²⁸ Thus, voters have become less dependent on partisan attachments, cues, and conventional ideologies to form their own opinions, ideas, and understandings of the political world. The increasing levels of voters’ political sophistication and awareness have, in turn, shaped a broader process of electoral change.

Changes in electoral environments involve a number of related dimensions, such as a shift in people’s value orientations and the structure of electorates, including social and partisan dealignment (Dalton, 2000; Dalton et al., 2000; Dalton, 2002; Miller and Niemi, 2002). These processes have contributed to the gradual decrease in the relationship between voting and partisan identifications – among other long-term predispositions (e.g. class cleavages, ideology, etc.) – and the growing impact of short-term factors influencing voting, such as the

²⁷ According to Dalton (2008: 19), the cognitive mobilisation process has two separate but related parts: ‘the ability to acquire political information and the ability to process political information’.

²⁸ According to some scholars, the expansion of the media seems to play a key role in the process of cognitive mobilisation, since the media have taken over many of the political information functions once controlled by political parties, providing less biased and ‘more convenient and pervasive delivery systems. [...] The growing availability of political information through the media has reduced the costs of making informed decisions’ (Flanagan and Dalton, 1990: 242).

images of candidates and leaders, opinions on issues, and media-based campaign messages. This is reflected in patterns of voting behaviour, such as increasing levels of absenteeism, ticket-splitting, electoral volatility, and competitiveness (Wattenberg, 1998; Dalton et al., 2000; Dalton, 2002).²⁹ Transformations in campaign practices are thus regarded as one of the parties' strategic responses to changes in electoral markets (Holzhacker, 1999; Dalton and Wattenberg, 2000a; Mair et al., 2004). The adoption of a professionalised model of campaigning is more often than not accompanied by a profound transformation in party organisations, from mass to catch-all or cartel models. In sum, electoral change is considered to be an intermediary factor, mediating between structural changes and the professionalisation of campaigns.

Despite the evidence of the positive association between electoral and campaign changes, there is still some confusion regarding the causal relation between both phenomena. For some specialists on American politics (Wattenberg, 1990, 1991), party loyalties have atrophied substantially because of the rise of media- and candidate-centred electoral politics.³⁰ That is, the line of causation runs from changes in campaigning to dealignment, not the reverse (being the path argued by the modernisation scholars). Whether the line of causation remains somewhat uncertain, it seems that recent changes in media content and modern media- and candidate-centred campaign practices continue to accentuate the erosion of partisan loyalties.

²⁹ All these changes are also known in the literature on voting behaviour as 'electoral dealignment processes' which have been observed mostly in the U.S. and Western European Democracies (Dalton, 2000; Mair et al., 2004), but also in some Latin American countries (Sánchez, 2007). If the underlying and intermediate systemic factors of the modernisation approach did play a relevant role in the emergence of professional campaign innovations in Mexico, then, we should find evidence of a positive association between socioeconomic, modernisation-related conditions and major changes in the structure and behaviour of the Mexican electorate preceding these innovations.

³⁰ Some authors have contended that changes in the content of the media tend 'to downplay the importance of political parties' (Dalton, 2008: 186). For instance, in the American case, the media 'have shifted their campaign focus away from the political parties toward the candidates, and a weaker parallel trend is evident in several parliamentary democracies' (Dalton, 2008: 186).

This chapter seeks to understand the role of electoral and party system change in the emergence of capital-intensive, professionalised election campaigning in Mexico, as a former competitive authoritarian regime. I regard electoral change in the context of Mexican transition to democracy as one of the key explanatory factors driving campaign professionalisation. The argument is that, like campaign change trends in many Western democracies, the emergence of modern Mexican campaign practices is, to a large extent, part of a broader process of change and adaptation by Mexican party organisations to the significant transformations in the structure and behaviour of the Mexican electorate which have taken place at least over the last three decades of the 20th century. I focus on a number of factors influencing parties' catch-all behaviour and organisation, as well as campaign innovations related to changes in the electoral environment in which Mexican parties and candidates compete for votes. These changes involve processes of electoral and partisan dealignment, volatility, and a widespread growth of competitiveness across most of the electoral districts of the country.

I begin the analysis by examining electoral aggregate data at both national and district levels. I specifically focus on dimensions of electoral change, such as competitiveness, volatility, fractionalisation, and turnout. Then, I analyse transformations in the structure of the Mexican electorate. I specifically focus on partisan dealignment and realignment trends, examining changes in the levels and distribution of partisanship since the 1980s. I also examine evidence of the influence of partisan loyalties on voting behaviour through party shifting, crossover, and split-ticket voting. I argue that changes in the levels of partisanship are of central importance to the analysis of campaign professionalisation, since all leading Mexican parties (the PRI included) changed their campaign tactics and strategies during the 1990s in order to appeal to the growing number of independent and/or weakly attached voters, who were available to be persuaded and mobilised by means of effective campaigns as a result of a gradual dealignment of the electorate from the formerly dominant party.

Dimensions of Electoral Change

Competitiveness

According to Langston and Benton (2009), two shocks contributed to the professionalisation of Mexican presidential campaigns. The first was the dramatic increase in electoral competition throughout the 1990s, and the second was large-scale electoral reform. Certainly, the increase in electoral competitiveness is a central dimension of the process of electoral change in Mexico. Figures 3 and 4 show a gradual decline in electoral support for the PRI, and a steady increase in support for opposition parties in presidential and congressional elections.

Figure 3 Presidential Election Results, Mexico, 1964-2006 (%)

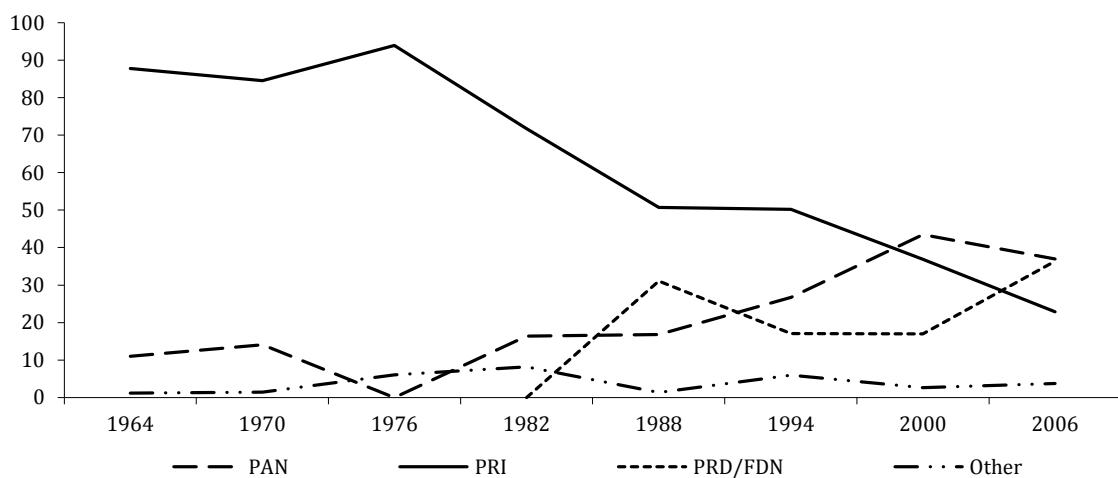
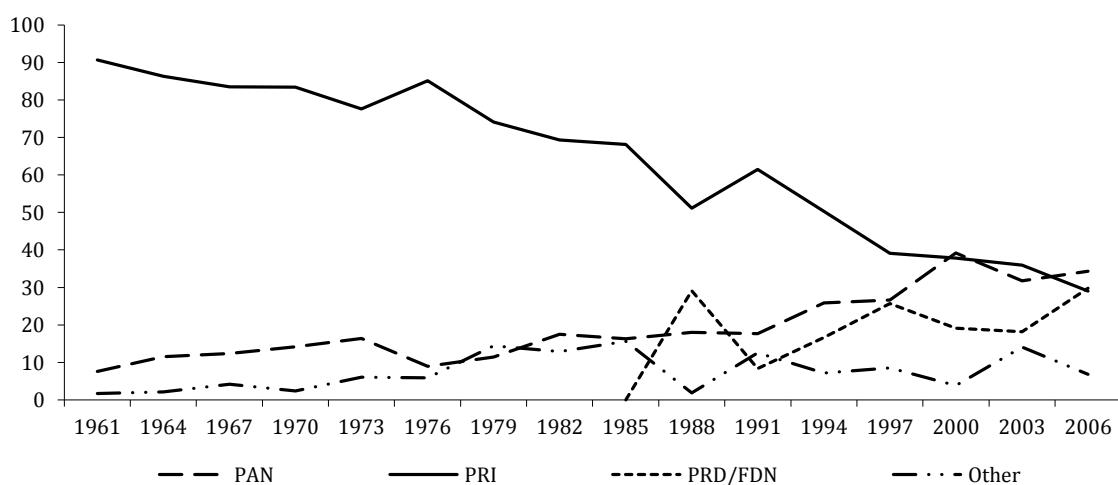


Figure 4 Lower House of Congress Election Results, Mexico, 1961-2006 (%)



Several studies, using a variety of indicators and measures, have produced an extensive description of the increase in the levels of electoral competitiveness in Mexico. This section will draw on the Margin of Victory (MV), understood to be the distance in percentage of votes between the first- and second-best parties, the electoral-competitiveness component of the Vanhanen's Index (1999, 2000), and the Number of Parties (NP) (Molinar, 1991a) as indicators of competitiveness.³¹ The figures set out in Table 2 show that, from its inception up until the mid-1980s, the dominant party won federal deputy elections by margins of victory of above 50 percent. The MV nevertheless reduced in the critical election of 1988, to only 22 percent. In that race, Carlos Salinas de Gortari, the PRI presidential nominee, received only 51 percent of the vote (until then, the lowest percentage for a winning PRI candidate).³²

Whether the PRI lost or won the election by a narrow margin remains uncertain. However, the result reflected a significant decline in the electoral support of the dominant party with respect to the past (it must be noted, nevertheless, that the MV increased again in 1991 reaching 43 percent, and it was not until 1997 onwards that the margins of victory reflected much more competitive contests).

Other relevant indicators in the context of dominant party systems, such as the competitiveness component of the Vanhanen's Index, also reflect the weakness of opposition parties' electoral capacity with respect to the PRI until the middle of the 1990s. It shows that competitiveness was rather marginal until the election of 1988, when it increased

³¹ The NP is also used in the next section as an indicator of changes in the structure of party competition. It should be noted that, although the NP is usually considered as a measure of competitiveness, according to Molinar (Molinar, 1991a: 1387) 'competitiveness and number of parties are related, but not identical, concepts'.

³² Moreover, the election turned out to be extremely controversial, due to a substantial delay in the delivery of the official results by the government's Federal Electoral Commission, which blamed the hold-up on a crash of the computer system designed to count votes. The opposition claimed that the crash was, in fact, part of an elaborate, 'computer-assisted' electoral fraud, deliberately caused to manipulate the counting of votes in favour of the ruling party; the leftist FDN candidate, Cuauhtémoc Cárdenas, subsequently claimed to have won the election.

substantially, only to fall again in 1991. However, in the 1994 election the electoral strength of the PRI was practically equal to the strength of the opposition as a whole and, from the mid-term election of 1997 onwards, the index clearly reflects the high competitiveness of the Mexican party system, which averaged 63 percent in the 1997-2006 period (see Table 2).

Table 2 Federal Deputy Election Results, Mexico, 1979-2006

	PAN	PRI	PPS	PARM	PDM	PCM PSUM PMS PRD	PST PFCRN PC	PVEM	PT	Other	Turnout	MV	Vanhelan Index	Fractionalisatio n	NP	Volatility
1979	11.4	74.2	2.7	1.9	2.2	5.3	2.2	-	-	-	49.7	62.8	25.8	0.43	1.1	
1982	17.5	69.3	1.9	1.3	2.3	4.4	1.8	-	-	1.3	66.8	51.8	30.7	0.49	1.1	7.55
1985	16.3	68.2	2.1	1.7	2.9	3.4	2.6	-	-	2.9	50.6	51.9	31.8	0.51	1.1	3.45
1988	18	50.4	9.2	6.1	1.3	4.5	10.2	-	-	0.5	47.4	22	49.6	0.69	1.6	21.85
1991	17.7	61.4	1.8	2.1	1.1	8.3	4.3	1.4	1.1	1.5	65.5	43.7	38.6	0.58	1.2	18.05
1994	26.8	50.3	0.7	0.9	0.4	16.7	1.1	1.4	2.6	0.3	75.9	23.5	49.7	0.65	1.8	18.75
1997	25.8	38	0.3	-	0.7	25	1.1	3.7	2.5	0.1	57	12.2	62	0.73	2.7	12.9
2000	39.1	37.8	-	0.8	-	19.1	-	-	-	2.1	63.2	1.3	60.9	0.67	2.6	15.25
2003	31.8	38.1	-	-	-	18.2	-	4.1	2.5	5.3	41.2	6.3	61.9	0.72	2.7	9.55
2006	34.4	29	-	-	-	29.8	-	-	-	6.8	57.7	5.3	65.6	0.7	3	15.7

Source: Author's calculations from the electoral results provided by the Comisión Federal Electoral, through Centro de Estadística y Documentación Electoral, Universidad Autónoma Metropolitana for 1979-1988, and the Instituto Federal Electoral for 1991-2006.

The analysis of data at the district level provides a more detailed view of changes in competitiveness in federal congressional elections. Although I do acknowledge the importance of complementary measures of competitiveness, here I focus on the MV, since some studies have suggested that, alongside the mixed electoral system, trends of reductions in the MV between the first and the second parties during the 1990s had significant consequences for the Mexican party system and the nature of partisan competition (Pacheco Méndez, 2003). I will come back to this issue later; for now, suffice to say that electoral districts with small margins of victory have a tendency towards two-party competition, in part due to strategic voting, since people tend to vote for one of the two parties with greater chance of getting into office, and avoid wasting their votes in supporting third-placed relevant competitors.

In the federal congressional elections of 1979, 1982, and 1985, the PRI won more than 96 percent of the electoral districts (see Table 3). In addition, in these elections roughly two-thirds of the districts were non-competitive, since they were won by margins of victory higher than 30 percent between the first- (normally the PRI) and the second-best parties (see Table 4). Districts won by opposition parties only rose from the historical election of 1988 onwards (with the exception of the 1991 mid-term election, in which the PRI again won almost all of the districts). The declining electoral dominance of the PRI seems to be particularly evident in 1997, when the opposition won 45 percent of the electoral districts, and the formerly dominant party won 165 districts: 110 districts fewer than they won in the 1994 election.

Table 3 Federal Electoral Districts Won by Each Party, 1979-2003

<i>Party</i>	1979	1982	1985	1988	1991	1994	1997	2000	2003	2006
PRI	296	299	289	201	290	275	165	132	164	65
PAN	4	1	9	25	10	19	64	142	80	137
FDN/PRD	0	0	0	75	0	6	70	26	56	98
Other	0	0	2*	0	0	0	1**	0	0	0
<i>Total</i>	<i>300</i>									

Source: Author's calculations from the electoral results provided by the Comisión Federal Electoral, through Centro de Estadística y Documentación Electoral, Universidad Autónoma Metropolitana (CEDE, UAM-I) for 1979-1988, and the Instituto Federal Electoral for 1991-2006.

*PARM

**PT

However, a closer examination of change in the margins of victory at the district level shows that, in fact, a significant increase in competitiveness took place following the election of 1994. In 1991, the districts with high and medium levels of competitiveness made up just 4 and 9 percent of the total, while the districts with a low degree of competitiveness made up 19 percent; 68 percent were non-competitive. In contrast, in 1994 the numbers of highly competitive districts increased to 22 percent, and those with a medium level of competitiveness to 29 percent; on the other hand, electoral districts with a low degree of competitiveness decreased to 21 percent, and just 28 percent remained non-competitive. The trend towards growing competitiveness continued in 1997 and 2000, and was consolidated in the election of 2003. This is reflected in the increasing number of districts in which the difference between the first and second parties was less than 10 or 20 percent (see Table 4).

Table 4 Federal Electoral Districts by Level of Competitiveness (MV) 1979-2006 *

Level	1979	1982	1985	1988	1991	1994	1997	2000	2003	2006
High (MV<10%)	11 (4)	12 (4)	18 (6)	78 (26)	13 (4)	65 (22)	104 (35)	115 (38)	113 (38)	135 (45)
Medium (10%< MV<20%)	6 (2)	33 (11)	40 (13)	51 (17)	26 (9)	88 (29)	89 (30)	99 (33)	99 (33)	87 (29)
Low (20%<MV<30%)	42 (14)	49 (16)	46 (15)	44 (15)	56 (19)	62 (21)	71 (24)	57 (19)	56 (19)	48 (16)
Non-competitive (MV>=30%)	241 (80)	206 (69)	196 (65)	127 (42)	205 (68)	85 (28)	36 (12)	29 (10)	32 (11)	30 (10)
Total	300	300	300	300	300	300	300	300	300	300

Source: Author's calculations from the electoral results provided by the Comisión Federal Electoral, through Centro de Estadística y Documentación Electoral, Universidad Autónoma Metropolitana (CEDE, UAM-I) for 1979-1988, and the Instituto Federal Electoral for 1991-2006.

* Percentage in brackets.

Other studies, which focus not only on the evolution of competitiveness in federal elections, but also on competitiveness in municipal elections from 1979 to 2003, confirm the competitiveness trend. Méndez de Hoyos (2006) shows that the growth in competitiveness in federal congressional contests was marginal during the period before the mid-1980s, and that competitiveness increased significantly up until the critical federal election of 1988. After a significant decrease in the 1991 mid-term election, the growing competitiveness trend continued from 1994 to 2000. Municipal elections,

on the other hand, display a slightly different picture, since increases in competitiveness remained constant from the mid-1980s to 2000. This also shows that, in some cases, the degree of competitiveness was higher in municipal than in federal elections, particularly during the first half of the 1990s. This suggests a different pace of growth in competitiveness between the municipal and the federal contests. One possible explanation for this could be that opposition parties initially focused their party-building efforts and electoral strategies on the local level, as a strategy to improve their electoral performance in state and federal races (Beer, 2003; Eisenstadt, 2004).

Closer electoral contestation is also reflected at the state level during the same period (Beer, 2003; Méndez de Hoyos, 2006). In 1985, the PRI won elections in 29 federal states, with a margin of victory of over 30 percent (23 of them were even won with margins of victory of at least 50 percent). Competitiveness was practically non-existent, since the only time when the PRI's margin of victory dipped below 20 percent was in the northern state of Chihuahua (PRI won the federal deputy elections in 1985 in that state with a 15 percent margin of victory). The situation had changed dramatically by 1997. In that election, the PRI lost 9 states to the opposition parties, and half of the states had margins of victory of below 20 percent. In sum, the 1997 election was much more competitive than previous ones, and by the mid-1990s most states had already transitioned from non-competitive or low-competitive elections to contests with medium or high levels of competitiveness.

The rise of electoral competitiveness has certainly played a major role in the emergence of professionalised campaigning in Mexico. According to Langston (2006), it has had a homogenising effect on campaign practices across all the three major parties. It has encouraged both national party leaders and individual candidates to professionalise their campaign practices, particularly in the more closely contested districts. Since districts with small margins of victory are at risk of being more easily won or lost, they are of the utmost importance to parties' strategies. For instance, national parties often funnel additional resources to help congressional candidates in those districts to carry out more mass-media based and capital-intensive campaigns. Modern campaign practices

are also likely in those districts in which individual candidates are able to finance their own campaigns (Langston, 2006).³³

Competitiveness and Party System Change

After reviewing trends of electoral competitiveness, I now focus on assessing competitiveness in terms of the effective number of parties competing in the party system. Table 2 shows two indicators of the structure of party competition: Rae's Fractionalisation Index (Rae, 1967) and Molinar's Number of Parties Index (NP) (Molinar, 1991a) from 1979 to 2006.³⁴ In order to provide a more detailed analysis of party system configurations at the district level, I will use the NP. This index has been employed by a number of studies on the transformation of the Mexican party system (Valdés Zurita, 1995b; Pacheco Méndez, 1997, 2003; Klesner, 2004, 2005). Table 4 shows a longitudinal analysis of the distribution of the NP Index in 300 federal, congressional, electoral districts from 1979 to 2003. Districts are grouped into four categories, as proposed by Pacheco Méndez (1997):

³³ According to Langston (2006), modern campaign practices and techniques used in closely contested districts includes elements such as mass-mailings, phone banks, and radio and local television campaigns.

³⁴ The NP index is based on the well-known Laakso and Taagepera's effective number of parties index (N) (Laakso and Taagepera, 1979), which is in turn a derivation of the fractionalisation index (F). According to Molinar, NP is 'a modification of the N index, in which a value of one is conventionally assigned to the winning party and the other parties are weighted using a nested N formula that is normalized with N [...] the advantage of NP relative to N is that NP behaves better in relation to the size of the largest party and to the gap between the two largest parties' (Molinar, 1991a: 1390). Molinar's index is used instead of Laakso and Taagepera's index, since N seems to over-count the real number of parties competing in elections, indicating almost one more party than NP in all cases. NP thus seems to reflect more accurately the changes in the structure of party competition in the Mexican dominant party system during the authoritarian period. This is clear, for instance, in the elections prior to 1988, in which N suggests a bipartisan competition, while NP clearly shows the electoral dominance of the PRI, which won each of these races by a massive landslide, garnering a little more than 68 percent of the votes (74 percent in 1979, and 69 percent in 1982). In addition, NP still behaves better when addressing more competitive elections, like the case of 1997. In that contest, the PRI got 39.1 percent of the votes, the PAN 26.6 percent, and the PRD 25.7 percent. Although N suggests a situation closer to multipartism (3.4), the rest of the opposition parties got only eight percent of the votes. In contrast, NP provides a rather conservative, but perhaps more accurate, value of 2.6 parties.

- Hegemonic (or dominant-party) system: refers to districts in which a single party dominates ($NP = 1.0$ to 1.5).
- Pure bipartism (or two-party) system: districts where two parties effectively compete ($NP = 1.5$ to 2.0).
- Plural bipartism (or two-and-a-half party) system: districts in which two parties compete and are joined by a third, which is weaker ($NP = 2.0$ to 2.5).
- Tripartism (or multipartism) system: districts in which three (or more) parties compete ($NP > 2.5$).

Similar to studies on the evolution of competitiveness based on measures like the MV and the IC, the analysis using the NP index shows a gradual and relatively recent growth of competitiveness in the Mexican party system, starting from the election of 1998 (since nearly two-thirds of districts in the elections of 1979, 1982, and 1985 were still dominated by the PRI). The situation had significantly changed by the mid-term election of 1997, in which less than 10 percent of the districts were hegemonic (see Table 5).

Table 5 Federal Electoral Districts by Number of Parties (NP) 1979-2006

Number of Parties (NP Index)	1979	1982	1985	1988	1991	1994	1997	2000	2003	2006
Tripartite ($NP > 2.5$)	0(0)	1(0)	3(1)	89(30)	1(0)	33(11)	56(19)	70(23)	63(22)	95(32)
Plural bipartism ($2.0-2.5$)	5(2)	24(8)	27(9)	38(13)	20(7)	105(35)	112(37)	101(34)	114(38)	109(36)
Pure bipartism ($1.5-2.0$)	53(18)	70(23)	71(24)	43(14)	92(31)	89(30)	107(36)	100(33)	100(33)	71(24)
Dominant ($1.0-1.5$)	242(81)	205(68)	199(66)	130(43)	187(62)	73(24)	25(8)	29(10)	23(8)	25(8)
Total	300	300	300	300	300	300	300	300	300	300

Source: For 1979-2003 (Klesner, 2005: 108). The figures for 2006 were calculated by the author from the electoral results provided by the Instituto Federal Electoral. The NP index is calculated as defined by Molinar (1991a: 1390).

The examination of the evolution of the number of parties at the district level shows that, in spite of the existence of the three-party system at the national level – and in Congress – and the significant increase in the number of congressional districts (89) with three-party competition in the election of 1988, the dominant trend during the 1990s was towards a two or a two-and-a-half format of party competition in most districts. This logic started in the 1994 election, in which the number of parties in 65 percent of the districts ranged from 1.5 to 2.5, intensified in 1997 (73 percent), and remained almost the same in subsequent elections (67 percent in 2000, and 71 percent in 2003). On the other hand, less than one-fourth of the districts were characterised by competition between three or more parties during the same period. Surprisingly, although in 1997 the NP (2.6) indicated a tripartism for the first time at the national level (see Table 2), only 53 of 300 districts were characterised by three-party competition in that election.³⁵

Hence, although the steady increase in the number of tripartite districts since the mid-1990s suggests that partisan competition may be gradually evolving towards a three-party format of competition across the country, it is debatable the extent to which Mexico could be currently considered to be a three-party system. Most analyses and evidence indicate that it is more accurately described as a three-party system at the national level, which coexists with two parallel two-party systems at the district and state levels (Pacheco Méndez, 1997, 2003; Klesner, 2004, 2005; Bravo Ahuja, 2009). These studies also show that bipartisan competition has strong regional foundations, with the PRI competing against the PAN mostly in the country's north and centre-west regions, and against the PRD mainly in the south. Three-party competition at the district level is

³⁵ The extent to which electoral competition at the district level involved two of the three major parties became quite evident in the mid-term election of 1997, in which the PRI lost the congressional majority for the first time, and the PRD and the PAN got almost the same percentage of votes. The figures of the mid-term election of 1997 show how many contests at the district level involved competition between the PRI and one of the other two leading parties. In that election, the PRI competed with the PAN in 37 percent of the districts (110) (the PRI taking 58, and the PAN 52 seats each), and with the PRD in another 38 percent of the districts (114) (the PRI again winning 58, and the PRD 56 of those districts). Bipartisan competition between the PAN and the PRD continued until 2003: the PAN and the PRD squared off in 23 districts, all of them concentrated in the Mexico City area (Klesner, 2005).

restricted to the Mexico City metropolitan area (the Federal District and the surrounding Estado de México) (for more on the parties' specific regional bases of support, see Pacheco Méndez, 1995; Klesner, 2004, 2005).

In this sense, some analyses provide evidence of a positive association between high levels of competitiveness and two-party competition at the district level during the 1990s. For instance, Pacheco Méndez (2003) used the index of the SF Ratio (or ratio of the second to the first loser's vote total) and the procedure proposed by Cox (1997) in order to measure the effects of high levels of competitiveness on the structure of party competition.³⁶ She found that 77 percent of the districts with high levels of competitiveness, and 74 percent of those with medium levels of competitiveness, in the 1991 election had a tendency to bipartisan competition in the 1994 election (see Table 6).³⁷

Table 6 Format of Party Competition in 1994 by Level of Competitiveness in Previous Election

	Margin of Victory in 1991			
	MV (0-9.9)	MV (10-19.9)	MV>20	Sub total
Tendency to bipartisan competition in 1994				
Ratio SF (0-.50)*	76.9	74.1	49.2	52.7
Tendency to tripartisan competition in 1994				
Ratio SF (.50-1.00)	23.1	25.9	50.8	47.3
Total	100	100	100	100

Source: Pacheco Méndez (2003: 554).

³⁶ The SF Ratio index is obtained by dividing the third-best party's votes in a given district to that of the second-best party. If, as argued by Duverger, most voters tend to concentrate their ballots on the larger parties as a consequence of electoral systems in which only larger parties have a chance of getting office or seats and related strategic voting patterns, then the second-best party or candidate should get much more votes compared to all the other losers (*Duvergerian equilibria*). In such a case, the SF Ratio would take values closer to 0. However, if voters tend to support, to a similar extent, the first and second losers (*non-Duvergerian equilibria*) then the SF Ratio would take values closer to 1 (Cox, 1997).

³⁷ She first computed the SF Ratio for each of the 300 congressional districts in 1994 and 2000, grouping them into two categories; those prone to two-party competition (Ratio SF <.50), and those with a tendency to tripartism/multipartism (Ratio SF >.50). Then she controlled them by the margins of victory in the previous federal election (1991 and 1997).

The situation was similar in the election of 2000, since 65.7 percent of districts with high competitiveness in 1997 exhibited two-party competition in 2000. However, the relationship tended to weaken in districts with medium and low levels of competitiveness (see Table 7).

Table 7 Format of Party Competition in 2000 by Level of Competitiveness in Previous Election

	<i>Margin of Victory in 1997</i>			
	<i>MV (0-9.9)</i>	<i>MV (10-19.9)</i>	<i>MV>20</i>	<i>Sub total</i>
Tendency to bipartisan competition in 2000				
SF Ratio (0-.50)	65.7	52.3	44.9	54.3
Tendency to tripartisan competition in 2000				
SF Ratio (.50-1.00)	34.3	47.7	55.1	45.7
<i>Total</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>

Source: Pacheco Méndez (2003: 554).

Political communication and party scholars have often noted that, in combination with single-member plurality electoral systems (or districts), '[a] system of bipartisan competition dominated by two or three competitive parties encourages party appeals of the catch-all sort and favors the use of sophisticated communication strategies to create temporary aggregations of widely differing interests in order to win elections' (Swanson and Mancini, 1996b: 257). It seems that bipartisan competition has favoured campaign professionalism in the Mexican case as well. Similar to increasing levels of electoral competitiveness, two-party competition has had important consequences for party and campaign strategies, especially in the second half of the 1990s. In light of this, Klesner (2005) argues that the combination of two-party competition with single-member district, plurality elections has provided strong incentives for all Mexican leading parties to display centrist, media-based campaign strategies that appeal to the broader middle of the electorate in order to maximise votes.³⁸

³⁸ Although Mexico has a mixed electoral system which combines relative-majority and proportional-representation features, the strong plurality component of the system prevails over the proportional representation one (300 lower-house congressional seats, out of a total of 500, are elected through 300 single-member plurality districts). In addition, because of the federal structure, a high number of executive and legislative offices at the national and state/local levels are also elected in winner-takes-all districts. Therefore,

Volatility

Electoral volatility, or, in other words, the extent of electoral instability of voting behaviour, is one of the most relevant dimensions in the literature of party systems and electoral change. Volatility usually refers to the net change in the vote shares of all parties from one election to the next – this is important because high degrees of change indicate a high level of availability of the electorate, and are often a signal of a realignment of the party system (Bartolini and Mair, 1990). In order to measure changes in volatility from 1979 to 2003, I utilise the Pedersen Index of volatility (1983), which is one of the most commonly accepted measures in the literature of electoral change.³⁹ Studies on party systems in Latin America have discovered that there is considerable cross-case variation in terms of levels of average volatility (Roberts and Wibbels, 1999; Payne, 2007).

Comparative research also shows that volatility in Latin America and Eastern Europe is considerably higher than in established Western democracies (Roberts and Wibbels, 1999; Mainwaring and Zoco, 2007; Payne, 2007). For instance, the aggregate volatility in congressional elections in the U.S. was 3.3 percent between 1946 and 2002, and 11.2 in presidential contests in the 1948-1996 period. And, according to a recent study on electoral change in eight Western European countries, the levels of average volatility in all cases (excepting Italy) were lower than 12 percent during the 1978-2003 period (Mair et al., 2004).⁴⁰ In contrast, the levels of mean volatility

Mexican parties often compete for a single post (e.g. the presidency, governorships, city halls, congressional seats in single-member plurality districts, etc.) which require simple majorities to be won.

³⁹ The Volatility Index is defined by Pedersen (1983), and Bartolini and Mair (1990), and is obtained by adding the net change in the percentage of votes (or seats) gained or lost by each party from one election to the next, then dividing by two. The range of values runs from 0 (no change) to 100 (maximum change). The formula is as follows:

$$TV = \frac{|PV_1| + |PV_2| + |PV_3| + \dots + |PV_n|}{2}$$

Where TV = total volatility;
|PV_i| = the absolute vote share change of party i

⁴⁰ Britain (7.17), Germany (7.23), Ireland (8.52), Belgium (9.8), Austria (10.5), Denmark (11.1), France (11.43), Italy (16.11).

(calculated according to the lower chamber of congress, and vote percentages in presidential elections) in Latin America during the same period were higher than 12 percent in 17 of the 18 countries included in the study by Payne (2007) on party systems (see Table 8). Moreover, compared to Western democracies, Latin American countries in the lower third of the table exhibited average volatility percentages that could be considered extreme. From a comparative perspective, levels of volatility in Mexico in both congressional and presidential elections are similar to those of Latin American countries – exhibiting from minimal to moderate levels, located in the upper-third of the table. However, the levels of volatility in Mexico have not been the same in all elections during the mentioned period.

Table 8 Average Pedersen Index Volatility Scores in Latin America, 1978-2004

	<i>Legislative Elections (Lower-chamber Seats)</i>	<i>Presidential Elections</i>	<i>Average</i>
Honduras	7.67	6.23	6.95
Nicaragua	15.05	10.5	12.77
Chile	3.47	22.17	12.82
Uruguay	14.65	14.59	14.62
Costa Rica	16.96	12.95	14.95
Mexico	14.23	18.43	16.33
El Salvador	18.09	19.48	18.79
Dominican Republic	19.09	23.08	21.09
Paraguay	19.86	28.7	24.28
Argentina	18.35	31.7	25.02
Colombia	17.51	33.64	25.58
Panama	19.36	34.78	27.07
Brazil	28.67	36.35	32.51
Venezuela	28.98	37.04	33.01
Bolivia	29.09	38.68	33.88
Ecuador	32.55	46.26	39.41
Guatemala	46.95	48.95	47.95
Peru	51.83	52.21	52.02
<i>Total</i>	<i>22.35</i>	<i>28.65</i>	<i>25.5</i>

Source: (Payne, 2007: 154).

Table 2 shows the levels of electoral volatility in each congressional election from 1979 to 2006. As can be noticed, the PRI's electoral dominance was not only reflected in the low degree of competitiveness, but also in the minimal levels of volatility, even as late as 1985. However, this changed substantially in the 1988-1994 period, where volatility averaged 20 percent, the highest level in modern Mexican history. Volatility gradually decreased to medium levels in subsequent elections. An examination of volatility trends at the district level from 1991 to 2003 confirms the tendency at the national level (see Table 9). Despite the fact that volatility was higher than 10 points in most of the districts in each of the elections studied, a gradual reduction in the percentage of districts with high volatility, from 35 percent in 1991 to 23 percent in 2003, is evident. Low volatility districts decreased in numbers as well, and although they rose from 15 percent in 1991 to 33 percent in 1997 and 2000, they fell again in 2003 to 21 percent. In contrast, districts with medium levels of volatility increased from 50 percent in 1991 to 56 percent in 2003 (with a small decrease to nearly 40 percent in 1997 and 2000). The fact that at least 40 percent of districts in each election examined had medium levels of volatility suggests that dealignment trends in the late-1980s and early 1990s tended to stabilise during the rest of the 1990s and early 2000s.

Table 9 Federal Electoral Districts by Level of Electoral Volatility, 1991-2003

Volatility (Volatility Index)	1991-1994	1994-1997	1997-2000	2000-2003
Low (< 9.9)	46 (15)	98 (33)	98 (33)	64 (21)
Medium (10 - 19.9)	150 (50)	120 (40)	124 (41)	166 (56)
High (≥20)	104 (35)	82 (27)	78 (26)	68 (23)
<i>Total</i>	300	300	300	298*

Source: Pacheco Mendez (2003). The figures for 2000-2003 were calculated by the author from the electoral results provided by the *Instituto Federal Electoral*. Volatility Index is defined by Pedersen (1983) and Bartolini and Mair (1990).

*The results of two electoral districts were annulled by the *Tribunal Electoral del Poder Judicial de la Federacion* in 2003.

Although it is debatable whether the high levels of volatility during the late-1980s and early 1990s indicate a critical realignment of the Mexican party system during that period, such increases certainly had important consequences for the Mexican party system. More recently, even the medium levels of volatility from 1991 onwards have been enough to swing several elections, and to introduce substantial – and indeed healthy – uncertainty in electoral outcomes, which was almost non-existent before 1988.

Turnout

Quantitative, comparative studies on campaigning have pointed to voter turnout as one of the contextual variables associated with party-distant and professionalised campaign styles. According to Plasser and Plasser (2002), low levels of turnout tend to stimulate candidate-centred and television-centred campaign practices involving ‘survey-based messages and targeting select groups or block of voters’ (Plasser and Plasser, 2002: 339). Although low turnout rates are more evident in the United States and most Latin American countries, studies on parties’ responses to electoral change in Western Europe have also noted that European parties are increasingly transforming themselves into centralised and professional campaigning organisations in response to electoral dealignment trends – including, in some cases, declining levels of turnout (Mair et al., 2004). Change in voter turnout has been one of the aspects of electoral change to have had significant consequences for Mexican electoral politics and, therefore, for campaign practices. Patterns of voter turnout in Mexico have changed substantially since the 1990s. Perhaps the most evident trend is a decline in the levels of turnout in both presidential and congressional elections (see Table 2).

Studies on electoral participation from the 1960s to the early 1980s (Ames, 1970; Ramos Oranday, 1985) concluded that, contrary to predictions of the literature on political participation based on advanced democracies, turnout tended to be particularly high in rural, poor, and marginalised areas, and was positively and significantly associated with electoral support for the PRI. In contrast, areas with higher urbanisation, industrialisation, and education rates tended to be characterised by lower voter turnout levels, and less support for the PRI. By the 1990s the situation

had changed substantially, and a number of studies (Klesner and Lawson, 2001; Buendía and Somuano Ventura, 2003; Moreno, 2003; Lawson and Klesner, 2004; Salazar Elena and Temkin Yedwab, 2007) showed that turnout patterns increasingly resembled those of advanced societies, in which electoral participation is higher among urban, educated, politically sophisticated, civically engaged, and affluent citizens than among poorer citizens with lower levels of education and political information, and among rural voters.

There is, however, a debate on the partisan biases in electoral participation and their consequences for electoral competition. Some studies contend that changes in electoral participation have resulted in a convergence between the PRI's and the opposition parties' levels of turnout (Klesner and Lawson, 2001; Lawson and Klesner, 2004). According to this view, and like other dimensions of electoral change examined in this chapter, recent transformations in turnout levels have benefited the PAN and the PRD (especially the former), to the detriment of the PRI. However, some other analyses have found that PRI identifiers are still the most likely to participate (Buendía and Somuano Ventura, 2003).

Klesner and Lawson argue that, since reductions in turnout have occurred among those voters who traditionally make up the PRI's traditional base of support, and because those Mexicans most likely to vote are also now those most likely to support the opposition parties, changing turnout patterns have affected the PRI's electoral performance negatively, and benefited the PAN and the PRD. Other analyses using individual-level data support this view. Moreno (2003) finds that, although turnout is positively correlated to strong PRI partisan identification, it is less likely to occur among the PRI's weak partisans and leaners (independent voters leaning to a particular party), which make up most of the formerly dominant party's base of support. The underlying mechanisms behind changes in electoral participation are still uncertain, but it could be expected that they are related to the broader process of transition from a dominant party authoritarian regime to a fully competitive multi-party democracy, and the causes of this transition (particularly modernisation and institutional-change related factors). A quite plausible account is provided by Klesner and Lawson

(2001; 2004), who argue that change in electoral participation is the result of three interrelated factors: 1) the decreasing efficacy of clientelistic networks and methods of social control (e.g. vote buying, coercion, and other methods of traditional authoritarian electoral mobilisation) (see also, Cornelius, 2004);⁴¹ 2) widespread voter registration in the early 1990s; 3) growing confidence in the integrity of the electoral process (Klesner and Lawson, 2001).⁴²

In spite of the current academic debates on the consequences of recent changes in the trends of electoral participation for partisan competition, most of the studies based on aggregate and individual-level data agree that, in the new electoral context, partisan and campaign strategies – among other conditions (e.g. institutional variables) – really matter for electoral mobilisation. Hence, variables that in the past were weakly associated with electoral participation in Mexico (relating to social status and individuals' resources, such as education, affluence, political interest, and sophistication, as well as short-term factors involving campaign attention, media exposure, and candidates' images, among others) are now significant predictors of voter turnout.⁴³

Changes in the Structure of the Mexican Electorate

Partisanship and the loosening of party attachments

A number of studies on electoral change in Western democracies point to partisan dealignment as one of the underlying causes of professionalisation in key areas of party organisation and behaviour, including campaigning (Dalton et al., 2000; Dalton and Wattenberg, 2000a; Farrell and Webb, 2000; Mair et al., 2004). Most of these works have concluded that the loosening of party attachments among the electorate provides strong incentives to develop campaign professionalism, since it diminishes the traditional bases of electoral support on which parties used to rely, and increases the

⁴¹ This factor seems to be a consequence of the decline of the PRI's resource incumbent advantages.

⁴² The growing confidence in the electoral process is clearly a consequence of the electoral reforms, which introduced a more modern and fair electoral system, and more transparency in the electoral administration.

⁴³ Some works on the rational-choice tradition argue that short-term factors are even more important than social status or individual resources-related factors. From this perspective, party and candidate strategies play a major role in mobilising voters, and factors relating to political advertising and campaign spending are key issues affecting turnout (Poiré, 2000).

size of the available electorate. This, in turn, forces parties to adapt their electoral tactics and strategies to capture the large number of floating voters in the electorate. Is the role of partisan dealignment as salient in the Mexican case as it is argued to be in established democracies in shaping the professionalisation of electoral practices? Before answering this question, it is necessary to assess if there is evidence of dealignment trends preceding professionalisation trends in Mexico.

Two related but distinct issues are of central importance to the relationship between partisanship and electoral change. The first one refers to changes in the level and distribution of partisanship over time; the second one refers to the influence of partisan attachments on voting decisions. A number of studies on the Mexican case provide evidence of the relationship between changes in partisanship and electoral change (Klesner, 1994; Domínguez and McCann, 1996; Poiré, 1999; Moreno, 2003; Somuano Ventura and Ortega Ortiz, 2003; Klesner, 2004, 2005; Moreno and Mendéz, 2007). Some of the above-mentioned works are centred on the evolution of levels of party ID and its determinants, and some focus on the influence of party ID on voting behaviour. I will consider each issue in turn.

Table 10 shows the aggregate distribution of partisanship (or macropartisanship) from 1983 to 2007 in Mexico. Although surveys suggest substantial volatility in the levels of partisanship during those years – which is also reflected in the levels of electoral volatility during the same period – a clear pattern that emerges from the data is the detachment of voters from the formerly dominant party. The PRI steadily lost a significant number of partisans to other parties, and even more to the apartisans (those who do not identify themselves with any party, or independents), during the 1983-2007 period. The share of the electorate expressing PRI partisanship fell from as high as 55 percent in the early 1980s to about 38 percent of the electorate in the late 1990s. It plummeted again after the PRI's defeat in the 2000 election, averaging 22 percent during 2001. This downward trend continued, so that by 2007 only one-fifth of the electorate identified with the PRI. In contrast, the proportion of PAN identifiers increased, gradually and substantially, from the beginning of the series until even as late as the late 2000s, from 10 percent to around one fourth of the electorate.

The distribution of the PRD macropartisanship has been, with some exceptions, quite stable through the period under examination: it has only increased moderately, from 7 to around 14 percent of the electorate (see Figure 5).

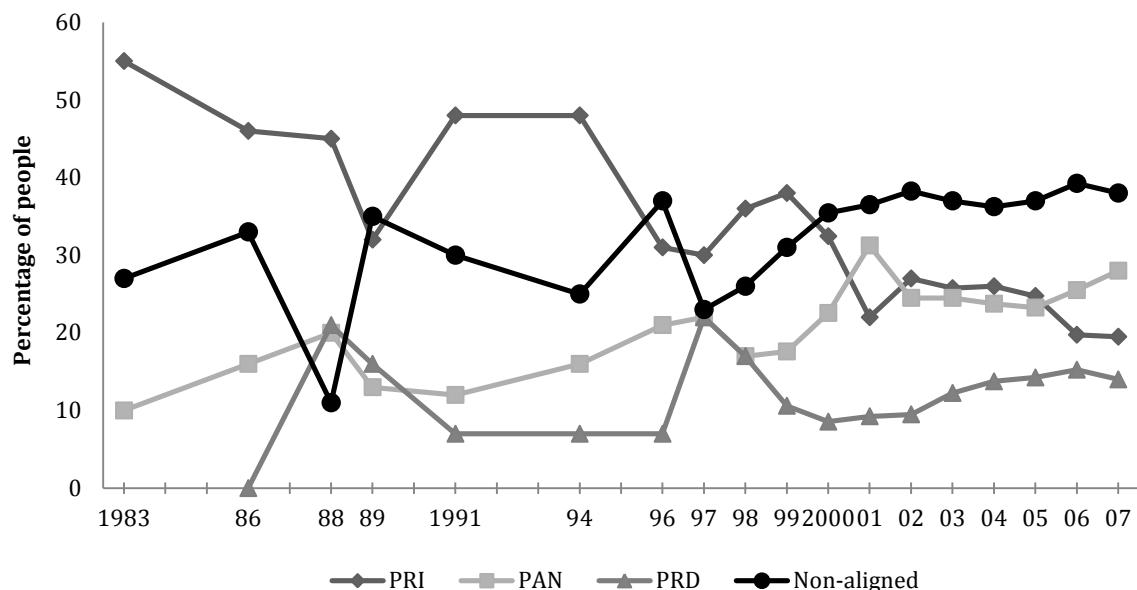
Table 10 Partisanship in Mexico, 1983-2007 (%)

	<i>Party Identifiers as % of the electorate</i>	<i>PRI Identifiers</i>	<i>PAN Identifiers</i>	<i>PRD Identifiers</i>	<i>Strong Identifiers</i>	<i>Weak Identifiers</i>	<i>Non-identifiers (None, Don't know)</i>
1983	65	55	10	-	-	-	27
1986	62	46	16	-	-	-	33
1988	86	45	20	21	-	-	11
1989	61	32	13	16	29	32	35
1991	67	48	12	7	33	34	30
1994	71	48	16	7	22	49	25
1996	59	31	21	7	23	36	37
1997	74	30	22	22	33	41	23
1998	70	36	17	17	27	43	26
1999	66	38	18	11	26	40	31
2000	64	32	23	9	26	38	35
2001	63	22	31	9	23	40	37
2002	61	27	25	10	21	40	38
2003	63	26	25	12	22	41	37
2004	64	26	24	14	22	41	36
2005	62	25	23	14	22	40	37
2006	61	20	26	15	25	36	39
2007	62	20	28	14	22	39	38
<i>Change</i>	<i>-3</i>	<i>-35</i>	<i>+18</i>	<i>-2*</i>	<i>-7</i>	<i>+7</i>	<i>+11</i>

Sources: 1983: Miguel Basáñez Survey, 1986: *New York Times* Survey, 1988: Gallup Pre-Election Survey, 1989 y 1991: *Los Angeles Times-Perspectiva Estratégica A.C.* Survey, 1994: *Belden y Russonello con Ciencia Aplicada* Survey, 1996: *Reforma-Los Angeles Times* Survey, 1997: ITAM-Arcop Survey, 1998-2009: Annual averages obtained from trimestral *Reforma* Surveys reported in Moreno (2009: 72-73). As the PRD did not come into existence until after 1988, the figure for the PRD in 1988 reflects the sum of partisan preferences expressed for the parties comprising the National Democratic Front (FDN), i.e. those who supported the 1988 presidential candidacy of Cuauhtémoc Cárdenas.

*Calculated from 1989.

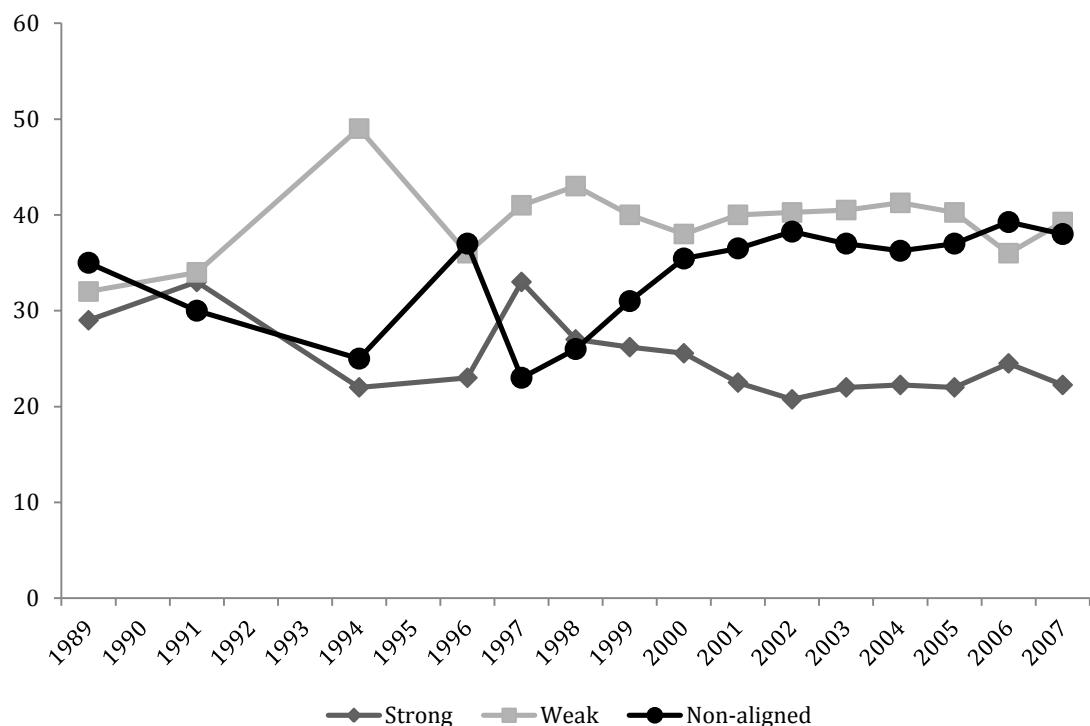
Figure 5 Partisanship in Mexico, 1983-2007 (%)



Source: Representative surveys of Table 15.

Although it could be argued that the proportion of partisan identifiers did not alter radically, since it declined by only 3 percent during the 1989-2007 period, the strength with which partisanship was expressed certainly appeared to shrink substantially. From 1989 to 1997 the proportion of 'very strong' partisans averaged 28 percent, but since then it has gradually decreased, and by 2007 only around one fifth of the electorate claimed a very strong attachment. In contrast, the proportion of apartisans (or independents) rose from around one fourth (27 percent) in 1983 to nearly 40 percent of the electorate in the early 2000s, and since then it has tended to stabilise. The proportion of weak partisans has increased from 27 percent in 1989 to around 40 percent of the electorate in 2007 (see Figure 6).

Figure 6 Strength of Partisanship in Mexico, 1989-2006 (%)



Source: Representative surveys of Table 15.

The strength of partisan ties is central to the issue of voter loyalty, given that voters with a strong partisan attachment are considerably more likely to vote for the party to which they have declared allegiance than weak partisans and apoliticals. They are thus also far less susceptible to competing campaign messages. In contrast, independent and weakly attached voters are significantly more susceptible to short-term voting factors relating to party strategies and campaign dynamics. In fact, it could be argued that the available electoral market to which parties and campaign organisations can target their vote-maximisation tactics and strategies is constituted by voters other than those having a strong partisan attachment. Indeed, analyses based on the 2000 Mexico Panel Study data confirm the positive and significant association between the strength of partisan identifications and vote loyalty in Mexico (Klesner, 2004; Magaloni and Poiré, 2004b:a). Or, in other words, the stronger

their self-reported partisan identification, the more likely respondents were to have voted for their preferred party in previous elections, and vice versa.⁴⁴

Alongside cognitive factors relative to the levels of political knowledge and campaign awareness, the strength of partisanship was also a strong predictor of vote loyalty during the 2006 presidential contest (Flores-Macías, 2009). By contrast, the voting decisions of weak partisans and independents were considerably more affected by campaign dynamics in both elections. Thus, if, as Paul Webb (2004: 24) suggests, we consider that ‘very strong partisanship virtually precludes the possibility of “electoral disloyalty”, but anything less than this leaves greater scope for effective party competition’, then we should admit that, in the Mexican case, both the non-aligned and the weak identifiers constitute a large enough body of swing voters to be able to change the outcome of an election. In this sense, Klesner (2005: 104-105) argues that ‘[w]ith more independent and weakly attached voters in the electorate in the 1990s, the parties [...] were forced to adapt their campaign strategies to capture the floating voters now available to the opposition. As a result, the parties have come to resemble catch-all parties to a much greater degree than they did before’.

Party loyalties and voting

The relevance of party identification in the process of electoral change not only depends on the level of partisanship and its distribution among the electorate, but also on the influence of partisan attachments on voters’ decisions (Bartels, 2000). Although, in general, party identification has proved to be the most consistent predictor of voting behaviour in Mexico (Moreno, 2003, 2009b), studies based on exit-poll survey data provide evidence of some weakening of the influence of

⁴⁴ This was true particularly in the case of the PRI, since 86.6 percent of strong PRI identifiers voted for the ruling party’s presidential candidate in 1994, and 80.1 percent did so in the mid-term elections of 1997. The relation remained fairly strong for weak PRI identifiers, since 76 percent of them reported having voted for Ernesto Zedillo in 1994, and 64 percent said that they supported the PRI in 1997. Partisanship also shaped voting decisions of the other two major parties’ identifiers, although to a lesser extent. Vote loyalty was particularly low among weak identifiers: only half or less of weakly attached PAN and PRD partisans reported that they voted for their party in both elections. The leaners were more likely to vote for a party other than the preferred one in each of the two previous elections (the only exception were the PRI leaners in 1994) (Klesner, 2004).

partisan ties on voting choices (Moreno and Mendéz, 2007), as well as of substantial vote switching during the late 1990s and early 2000s (Klesner, 2005). According to Moreno and Mendéz (2007), the proportion of partisans of a given political party who cast their votes for a presidential candidate of another party (crossover voters) increased from 7 percent in 2000 to 10 percent in the 2006 presidential election. In contrast, the percentage of partisan vote diminished from 65.3 to 59.3 percent during the same period.

Similarly, votes for candidates of different political parties on the same ballot (split-ticket voting), instead of for candidates of only one party, have also increased from 13 percent in 2000 to 19 percent in 2006. However, Moreno and Mendéz point out that changes have not affected all parties equally, since crossover voting was higher among PRI identifiers than among the partisans of the other two major parties in 2006 (in 2000, most crossover voting was among PRD partisans), and split-ticket voting was higher among PRI partisans than among PAN and PRD identifiers in both elections.⁴⁵

Dealignment or realignment?

Although useful, terms such as ‘dealignment’ and ‘realignment’ were conceived in the context of developed, Western democracies, and seem to be problematic when applied to electoral change in new democracies like Mexico. Processes of partisan and electoral dealignment may be common to both developed and developing democracies. Nevertheless, the meaning of some aspects of dealignment in older democracies may not equate to the context of transitional democratic systems. For instance, the literature on electoral change in Western democracies points to decreasing levels

⁴⁵ While in 2000, 10.8 percent of PRI identifiers voted for a presidential candidate of another party, in 2006, 25.3 percent of them did so. Crossover voting also increased among PAN identifiers, but to a lesser extent: from 5.4 percent in 2000 to 10.6 percent in 2006. In contrast, PRD partisans were more loyal in 2006 than in the previous presidential election, since the level of crossover voting among them decreased from 16.6 percent in 2000 to 7.2 percent in 2006 (Moreno and Mendéz, 2007: 55). Split-ticket voting was more frequent among PRI identifiers in both elections (18 percent in 2000, and 31 percent in 2006). However, they were the PAN identifiers who contributed more to the total percentage of split-ticket votes in 2000 (up to half of the overall split-ticket vote), and the PRD identifiers in 2006 (47 percent) (Moreno and Mendéz, 2007: 57).

of turnout and partisanship, as well as increases in electoral support for third parties (fractionalisation), volatility, ticket-splitting, and crossover voting, among other electoral dealignment trends (Dalton et al., 1984). Similarly, cases of democratic transitions from competitive authoritarian regimes which are centred on the electoral arena may display several such trends as well. However, they are determined by the broader context of political change in which they take place.

Based on the Mexican case, Pacheco Méndez notes (2003) that, while in advanced democracies dealignment is often a consequence of the limited capacity of the party system to respond to the emergence of new social cleavages (among other important societal changes), in cases of democratisation from dominant party authoritarian regimes, dealignment is not only a reflection of party system change, but also of a broader process of political change involving major transformations in other structures of the political system. For instance, while fractionalisation in advanced democracies usually involves increasing electoral support for third-placed, minor parties, in dominant party authoritarian systems it may be more restricted to growing support for major opposition parties at the expense of the dominant party. Furthermore, although dealignment trends in both advanced democracies and transitional dominant party authoritarian systems involve major changes in the parties' social bases of support, in the former they reflect the detachment of voters from the relevant parties which traditionally structured party competition, while in the latter they are a reflection of the discontent of voters regarding authoritarian, single-party rule. In these latter cases, the resulting transformation of the party system is also more profound, since it actually involves the very rise of effective political competition.

And so scholars are still divided as to whether the patterns of change in the levels and distribution of party identification should be seen as a dealignment or as a realignment of the Mexican electorate. Influential early studies which focused on the transformation of the Mexican party system concluded that a gradual dealignment of the electorate from the dominant party occurred as the country modernised (Klesner, 1994; Craig and Cornelius, 1995). In a similar vein,

more recent studies based on survey data indicate that a substantial dealignment did take place from the mid-1980s onwards, and that a major realignment of the Mexican electorate has not yet occurred (Klesner, 2005).⁴⁶ Others claim that there is no evidence of dealignment, and that a gradual realignment trend is actually more feasible (Moreno and Mendéz, 2007). There are valid arguments on each side of the debate.

Certainly, and contrary to the dealignment thesis, voters' detachment in Mexico has not been from all parties, but mainly from the formerly dominant party. Thus, dealignment in Mexico has not occurred exactly in the same way as in developed democracies. Moreno and Mendez (2007) argue that more recent decreases in the net number of partisan identifiers are actually a continuation of the detachment of voters from the PRI, which has its origins in previous decades and is not a signal of generalised dealignment, since the numbers of PRD and PAN identifiers have not decreased. They also contend that what is lost by a party can be gained by another one; thus, detachment from the PRI does not necessarily translate into a direct transference to the segment of independents (Moreno, 2003; Moreno and Mendéz, 2007). They provide evidence of a realigning phenomenon that they called 'rotation', which refers to the transference of partisan attachments not only from the PRI to the other two major parties, but also from the PAN to the PRD. Therefore, they argue that changes in the levels of partisanship are a reflection of a realignment trend.

In contradiction of the realignment thesis, other authors believe that, while some movement of the electorate from the PRI to the PAN and the PRD has certainly occurred, a large percentage of voters still remain as non-aligned. Klesner (2005) argues that both parties have managed to realign only a limited portion of the dealigned electorate coming not only from the formerly ruling party, but also from the entry of new voters into the electoral arena.⁴⁷ Similarly, a number of studies show

⁴⁶ It is worth mentioning that both positions are not totally incompatible, since they agree that there seems to have been no evidence of dealignment during the second half of the 1990s, and that, although a full realignment has not occurred yet, it could be happening gradually.

⁴⁷ A significant part of the partisan dealignment in Mexico comes from the entry of new voters into the electorate.

that during the 1980s and the first half of the 1990s, the PAN and the PRD had significant problems securing electoral support among voters unsatisfied with the ruling party's performance, and so building broader and more stable winning electoral coalitions (Greene, 2007). However, this changed to a considerable extent in the late-1990s. Klesner (2005) notes that effective campaigners of both parties (e.g. Cárdenas in the election of 1997, and Fox in the election of 2000) were able to generate such coalitions by getting support not only among their own partisans, but also from their opponents' weak partisans, and from non-aligned voters (see also Moreno, 2003). They have been, however, less successful in turning the independents' support into a more enduring attachment to their parties (see, for an analysis on the PRD, Bruhn, 1997; and for an analysis on the PAN, Mizrahi, 2003).

What are the consequences of changes in the distribution and strength of partisanship to campaign practices in Mexico? Whether the extent of dealignment or realignment of the Mexican electorate is still uncertain, one thing is for sure: political parties cannot rely solely on their own basis of support in order to win elections. Since more independent and less strongly attached voters appeared in the 1990s and the 2000s than in previous decades, all major parties (the PRI included) are now increasingly forced to develop centrist media appeals aimed at garnering support from floating voters in order to generate winning electoral coalitions (see Figure 7). In fact, the one party that was able to win elections based solely on the mobilisation of its partisans was the PRI; more often than not, the PAN and the PRD have had to generate support across weak and non-identifiers in order to maximise votes. However, in the new electoral context, even the formerly dominant party cannot rely on its partisans to win elections, since PRI partisan loyalties have not only diminished in terms of their proportion in the electorate, but also in terms of strength. For instance, while during the early and mid-1990s the PAN had to convince its partisans over and over in order to remain competitive, and although the PRI enjoyed 'chunks of loyal voters with a strong predisposition virtually to ignore the campaigns' (Poiré, 1999: 42), now the PRI has less strongly attached and loyal voters than in the past. As Klesner (2005: 105) argues, 'the new structure of

incentives for the parties – much closer electoral contestation and the existence of many few strong partisans – has forced all parties to adopt characteristics of catch-all parties, although not without much internal struggle over the implementation of what many regard as “U.S.” electoral practices’.

Conclusion

Innovations in campaign practices are not context-free. The use and effectiveness of modern campaign tactics and strategies are conditioned by the electoral context in which they are displayed. For this reason, the professionalisation of campaigning in Mexico should be seen as closely related to major changes in the Mexican party system. The argument of this chapter is that the emergence of modern campaign practices has been shaped to a great extent by a profound process of change in the structure and behaviour of the Mexican electorate, which has dramatically transformed the Mexican party system. For most of the 20th century, Mexico had a competitive authoritarian regime in which the PRI dominated the electoral arena. During the 1990s, however, Mexico’s dominant party authoritarian system transformed into a fully competitive, multiparty system, as a result of a configuration of conditions, involving socioeconomic modernisation, economic and political liberalisations, and opposition party strategies. Central to the process of party system change was the dealignment of the Mexican electorate from the formerly dominant party, since this has dramatically altered the patterns of voting behaviour across the country. This was reflected in the dramatic increase in electoral competitiveness, volatility, and fractionalisation during the 1990s. A number of dimensions of the process of politico-electoral change have fostered campaign innovations, producing an electoral environment much more suitable for the use and effectiveness of modern campaign tactics and strategies than that of the authoritarian period.

- **Partisan dealignment.** As a result of the process of partisan dealignment, there was an expansion of the electoral market or, in other words, of the electorate susceptible to vote-maximisation party strategies and campaign dynamics/messages. This was reflected in the increase of non-identifiers and the diminishing number of strong partisans during the 1990s

and 2000s. Although there have been some increases in the number of voters identifying with the PAN and the PRD (mainly with the former), realignment has only occurred to a limited extent, and most of new attachments developed during the period seem to be weak. Both parties have been more successful in getting votes from independents and weakly attached partisans by means of effective campaign strategies than in turning them into loyal partisans. The large number of weakly attached partisans and dealigned voters constitutes a large enough body of voters to swing an election (Klesner, 2005). The electoral dynamics and incentives resulting from the new structure of the Mexican electorate – many few strong partisans, and more independent and weakly attached voters – have forced all leading parties to adopt catch-all features and a number of poll-driven, media-based, U.S.-style campaign practices, and adapt their campaign strategies to capture the large number of floating voters in the electorate (Klesner, 2005). In this sense, Langston (2006) notes that as a result of electoral competition, the electioneering efforts of the three major parties have tended increasingly towards homogenisation and modernisation.

- **Electoral volatility.** Sudden increases in electoral volatility during the late-1980s and early 1990s also forced parties to respond in the face of a more mobile electorate by developing campaign strategies to appeal to party-shifters. Although volatility tended to decrease toward medium levels during the 1990s, it is still high enough to produce a substantial degree of uncertainty about electoral outcomes, reminding party leaders and candidates that, in the new electoral context, it is inconsequential whether a victory is achieved by a small margin of victory or by a landslide, since it can be reversed at the next election.
- **Two-party competition.** In spite of the three-party system at the national level, most of Mexico's partisan competition at the state and district level is between the PRI and one of the other two major parties. This format of two-party competition has strong underlying regional foundations, with the PRI competing with the PAN in the north and centre-west and the PRD in the south (Klesner, 2004, 2005). Increasing electoral competitiveness seems

to interact with the electoral system, stimulating strategic voting patterns which, in turn, continue fostering bipartisan competition at the district and state levels (Pacheco Méndez, 2003). The combination of two-party competition and single-member district plurality elections has also provided powerful inducements to candidates' and parties' adoption of organisation and behaviour of the catch-all type, and the development of centrist, media-based electoral strategies (Klesner, 2005).

- **Turnout.** Changes in the patterns of electoral participation over the last two decades also played a role in the rise of modern campaigning in Mexico. Patterns of turnout changed due to the erosion of traditional instruments of authoritarian mobilisation, itself a result of the decline of the dominant party's patronage advantages and the passing of electoral reforms which increased voters' trust in the electoral process and institutions. Studies on the issue suggest that changes involve increased electoral participation rates among more urban, educated, and informed citizens, but decreasing turnout rates among rural, poorer, and less educated voters. In sum, in the new electoral market, those most likely to participate are those who have greater individual resources, and who tend to be more susceptible to campaign messages and modern campaign practices than to traditional authoritarian forms of electoral mobilisation.

5 Media System Change and Campaign Professionalisation

When opposition parties lack access to media that reaches most of the population, there is no possibility of fair competition

(Levitsky and Way, 2010a: 11)

Introduction

The role of the media in changing campaign practices

Comparative studies on the professionalisation of election campaigning list media system change as a relevant factor shaping campaign change (Bowler and Farrell, 1992a; Butler and Ranney, 1992; Farrell, 1996; Swanson and Mancini, 1996b). For instance, Swanson and Mancini (1996b: 255) argue that alongside ‘the weakening of political parties’, ‘the rise of a powerful role for the media’ is the immediate cause of modern innovations in electoral campaigning. Swanson (2004: 49) also argues that it is the rise of the new ‘media-intensive modern model [which] has brought the professionalization of campaigning, as technical experts in using mass media, opinion polling, and marketing techniques have been brought into political parties’. Other authors (Butler and Ranney, 1992: 280) have gone even further, stating that ‘[t]he fundamental cause of the widespread ‘Americanization’ of electioneering, both in vocabulary and technology, lies in the revolution of communications’.

The literature on parties and party systems also stresses the role that technological and media change have played in contemporary party organisational and campaign change. Some party scholars note that ‘[n]ew technologies and changes in the mass media have enabled party leaders to appeal directly to voters and thereby undermined the need for organisational networks’ (Mair, 1997: 39). In the American case, for example, the widespread penetration of television made it possible for individual candidates to appeal to voters in a more direct fashion, rendering local party organisations and volunteer activists – who once were central in mobilising and persuading voters – less important (Agranoff, 1972, 1976a; Wattenberg, 1991; Trent and Friedenberg, 2008). Other authors contend

that the media have assumed many of the political information and communication functions once controlled by parties because they ‘are considered unbiased providers of information and [...] have created more convenient and pervasive delivery systems’ (Flanagan and Dalton, 1990: 240-242).

Instead of learning about an election at a campaign rally or from party canvassers, the mass media have become the primary sources of campaign information. Furthermore, the political parties have apparently changed their behaviour in response to the expansion of the mass media. There has been a tendency for political parties to decrease their investments in neighbourhood canvassing, rallies, and other direct contact activities, and devote more attention to campaigning through the media (Dalton and Wattenberg, 2000b: 11-12).

Another reason why the growth of electronic media, particularly television, has tended to diminish the role of parties in election campaigns is because they ‘make it easier to communicate events and issues through personalities, and voters themselves find it easier to hold an individual leader accountable than an institution such as a party’ (Dalton et al., 2000: 55). In sum, many authors have come to the conclusion that transformations in media systems, usually labelled under the vague term of mass media expansion, shape campaign changes substantially. However, Hallin and Mancini note that *media-centric* accounts of changing political communications usually fail to address in what sense the media system has ‘expanded’. They contend that ‘media system change is not analysed with the same rigor as other variables, either conceptually or empirically, and we are left with many ambiguities about what exactly has changed in media systems and how those changes are related to the wider historical process’ (Hallin and Mancini, 2004a: 33).

Contrary to most studies on the professionalisation of campaigns in the U.S. and other Western democracies, which have pointed to technological and media system change as key factors driving campaign change (Negrine et al., 2007), the extant accounts on the modernisation of presidential (Langston and Benton, 2009) and congressional (Langston, 2006) campaigns in Mexico have tended to downplay the role of the media in fostering campaign professionalism. According to these analyses, the introduction of new technologies, such as radio and television, was not the

trigger for campaign change. They stress that, despite a considerable degree of television penetration across the country, except for in the 1994 PRI's presidential campaign, the candidates of the three leading parties tended to rely on traditional, people-intensive communication channels, and it was not until the late 1990s that the media became relevant vehicles for political intermediation for all parties.⁴⁸ These analyses argue that the triggering factor of changes in electioneering were the increases in electoral competition and large-scale electoral reform involving new party and campaign public finance rules that allowed for fair and well-founded campaigns (see also Wallis, 2001).⁴⁹

Did media system change play an independent, causal role in the professionalisation of campaign practices in Mexico? And, if that is the case, how has Mexico's media system 'expanded' in order to foster campaign change? This chapter seeks to understand the role of a number of significant changes in the media system that promoted the professionalisation of Mexican political campaigning. I suggest that, alongside electoral and institutional changes during the democratisation process, major transformations in the media system were key factors driving campaign professionalisation in Mexico. For instance, important campaign innovations involving the intensive use of media appeals (such as paid advertising spots on radio and television) and media-based campaign techniques and styles (such as media management, negative campaigning, permanent campaigning, and rapid rebuttal) were possible only after a major shift in the Mexican media environment – involving more autonomy and neutrality for media organisations in the electoral process – had taken place.

⁴⁸ Political intermediation is understood as 'the varying channels and processes through which voters receive information about partisan politics during the course of election campaigns and are mobilized to support one party or another' (Gunther et al., 2007: 1).

⁴⁹ The electoral reform of 1996 changed, among other things, the campaign finance regime, so that all parties could compete almost equally in campaigns; in turn, this gave both parties and candidates new incentives to professionalise their campaign efforts and use the mass media, particularly television, as a vehicle for electoral communication (Langston 2006; Langston and Benton, 2009) (see Chapter 6).

Even campaign change accounts that stress the role of electoral reforms and party system change in the modernisation of Mexican campaigns implicitly acknowledge the relevance of media system change when arguing that opposition parties were excluded from the media advertising market, not only due to their scarce resources for carrying out capital- and media-intensive campaigns, but also because of collusion between the dominant party and private media owners. Most of the print and broadcast media would not have accepted their paid political advertising, nor provided a fair and balanced news coverage of election campaigns to the public (Langston and Benton, 2009). Studies in the late 1990s brought forward the idea that ‘the most limiting factor for political parties [campaign change], besides actual legal barriers to participation, has been the lack of financial resources and the ruling party’s continuing control of the media’ (Martínez, 1999). Hence, even though by the mid-1990s the electoral market had become much more competitive, and the electoral law fairer than in the past, the media market still remained significantly biased towards the ruling party. I shall focus next on the concept of the media system, as well as on its different but interrelated dimensions.

Media systems research

Comparative research on political communications has long been interested in how changes in media environments shape the development of campaign styles, strategies, and communications across diverse political regimes and societies (for a review on a number of media system features shaping campaign practices, see Plasser and Plasser, 2002). However, unlike other sub-fields of comparative politics (such as literature on party and electoral systems, etc.), and in spite of the significance of media systems for understanding changing political communication processes, there is still no consensus among scholars on the most appropriate conceptual typologies for comparative research (for a comprehensive review on the media systems’ literature, see Hallin and Mancini, 2004b; Kleinstuber, 2004; Norris, 2004; Norris, 2011). As Norris (2011: 355) argues, the notion of a media system implies a ‘relatively stable and enduring institutional arrangement with joined-up

interaction among disparate parts', and because of that it is often difficult to determine which dimensions should be included in the concept in order to avoid confusion, as well as which operationalisation and measurement-related issues should be brought into comparative research.

Early studies on media systems centred on cross-country differences between the patterns of state, public, or private sector ownership of newspapers and radio and television broadcasting (Siebert et al., 1956). More recently, Hallin and Mancini (2004b) have developed an ambitious framework for comparative analysis which emphasises four separate but interrelated dimensions: 1) the development of media markets (with particular attention to the predominance of public or commercial broadcasting sectors); 2) political parallelism (the degree and nature of the links between the media and political parties); 3) the degree of journalistic professionalism; 4) the extent and nature of state intervention in the media system.⁵⁰ Similarly, Norris (2004; 2011) focuses on four media systems components, involving: 1) the communications infrastructure (or media access); 2) the regulatory environment (including the degree of press freedom); 3) the structure of media ownership; 4) the capacity, values, and skills of the journalistic profession.

Building on these works, this chapter looks at a number of significant changes in four components of the Mexican media system that took place during the 1990s and shaped the professionalisation of Mexican campaigns. These are: media access, state-media relationships and media freedom, the media market (including the structure of media ownership), and journalistic professionalism and values. I argue that, alongside the changes in the structure and behaviour of the Mexican electorate discussed in Chapter 4, these transformations contributed greatly to the adoption of a number of professional, media-centred campaign innovations by Mexican parties and individual candidates. The bulk of the analysis focuses on changes in the broadcast television sector,

⁵⁰ Despite the value of their study, some scholars have critiqued the categorical typologies developed by Hallin and Mancini to describe North American and Western European systems, suggesting they are problematic when applied to the study of media systems in new democracies (Voltmer, 2008).

since it is the predominant Mexican medium in terms of penetration, mass viewership, and patterns of news consumption.

Dimensions of Media System Change

Media access and political media use

A television-centric and entertainment-oriented media system

Previous studies on campaign change have focused on the degree to which a national media system is technologically advanced, particularly ‘on whether television had emerged as the most important medium reaching the largest and most heterogeneous audience’ (Swanson and Mancini, 1996b: 265). Swanson and Mancini (1996b: 265) suggest that ‘[t]he centrality of television [...] favors [the] adoption of new-style methods of campaigning’. In Mexico, however, the emergence, expansion, and consolidation of television had little impact on campaign practices and communications during most of the 20th century. It was not until the late 1990s that it turned out to be the core medium for campaign communications for all parties.

In 1970 (20 years after television was initially introduced to the country), TV access was still low, and restricted to a few sectors of the population (proportionally there were 36 TV sets per 1000 inhabitants). However, by the early 1990s access became relatively widespread (150 TV sets per 1000), and almost doubled by the end of the decade (267 sets per 1000).⁵¹ In terms of household penetration, TV use increased from 86 percent in 2000 (INEGI, 2001) to 99 percent in 2008 (IBOPE AGB México, 2008), exceeding by far that of other media, including radio (86 percent) and the Internet (18 percent) (IBOPE AGB México, 2008). In contrast, access to newspapers has been quite limited (see Table 11). Moreover, there is no single national newspaper in Mexico, and the main newspapers’ circulation barely reaches more than 100,000 copies (each) in the urban area of Mexico City, where there are an estimated 18 million people (Trejo, 2010). Thus, television is the only mass

⁵¹ The growing trend was particularly significant in the main cities of the country, where access increased from 388 TV sets per 1000 habitants in 1996 to 443 TV sets in 2005 (Jara Elías and Garnica Andrade, 2009).

medium that reaches nearly all of the public without regard to gender, age, social class, or place of residence.

Table 11 Indicators of Media Penetration in Mexico

Newspaper circulation per 1000 (1996)	Radios per 1000 (1997)	TV Sets per 1000 (1999)	% TV Households	% Of Population Online (2000)
97	325	267	85	.5

Sources: Norris (2000, 2004); Plasser (2002).

Based on data of average TV viewing time and newspaper circulation figures, Norris (2000) classifies the media environments in her study on major transformations in political communications in post-industrial societies into two broad categories: *newspaper-centric* societies, characterised by extensive reading of the press and relatively little attention to television entertainment, and *television-centric* systems, which feature intensive exposure to television entertainment and low newspaper circulation.⁵² Mexico belongs to this latter set, of heavy TV-viewing societies, alongside countries such as the United States, Greece, Spain, Italy, and Turkey, Poland, and Hungary, exhibiting the highest average of TV viewing time and the lowest newspaper circulation figures (Norris, 2000). Furthermore, television audience measurement data indicate that almost half of Mexican TV viewers (45 percent) are *heavy viewers*, who watch an average of 1516 hours per year, most of them devoted to entertainment (Jara Elías and Garnica Andrade, 2009).⁵³ Similarly, but focusing more specifically on data about patterns of news consumption (the percentage of people watching TV news on a daily basis and reading about politics in newspapers every day), Plasser and Plasser (2002) regard Mexico and other Latin American cases (Argentina, Brazil, Colombia, Chile, and Venezuela) as

⁵² The *newspaper-centric* societies include all the Scandinavian nations, many smaller European welfare states such as Switzerland, Austria, and the Netherlands, and the Czech Republic and South Korea (Norris, 2002).

⁵³ A typical Mexican watches an average of 1100 hours per year (3 hours per day). However, exposure to television is not equally distributed across the population. As noted, 45 percent of Mexicans (20 million people) are *heavy viewers*, who generate 74 percent of the total time of TV exposure, watching an average of 1516 hours per year. 36 percent (16 million) are *medium viewers*, who generate 23 percent of exposure, watching an average of 589 hours per year, and only four percent (8.8 million) are *light viewers*, who generate 4 percent of exposure, watching an average of 163 hours per year (Jara Elias and Garnica Andrade, 2009).

television-centric systems. Survey data also show that Mexico is an extreme case in the set of *low news-users* countries, characterised by low attentiveness to the news (not only in print but also in broadcast media) (see Table 12).⁵⁴ Mexicans thus watch a great deal of television, but not news and current affairs per se. TV audience measurement data indicate that the Mexican public is mainly *entertainment-oriented* – as noted above. From 2000 to 2005, exposure to all types of television entertainment genres averaged 87 percent of the total time of TV exposure, while exposure to TV news averaged only 8 percent of the total (Jara Elías and Garnica Andrade, 2009). Nevertheless, in spite of being predominantly entertainment-oriented, television is also the primary source of political information for most Mexicans.

Frequency	Broadcast		Print	
	2003	2005	2003	2005
Daily	46.2	37.6	11.8	15.3
Several times a week	10	15.3	10	12.8
Once a week	7.2	13.5	9.9	14.2
Once every two weeks	1.2	3.1	2.3	5.5
Once a month	0.9	3.1	2.1	5.3
Sometimes	20.2	15.9	20	16.5
Never	13.4	9.4	41.7	27.8
DK/NA	1	2.2	2.1	2.6
<i>Total</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>

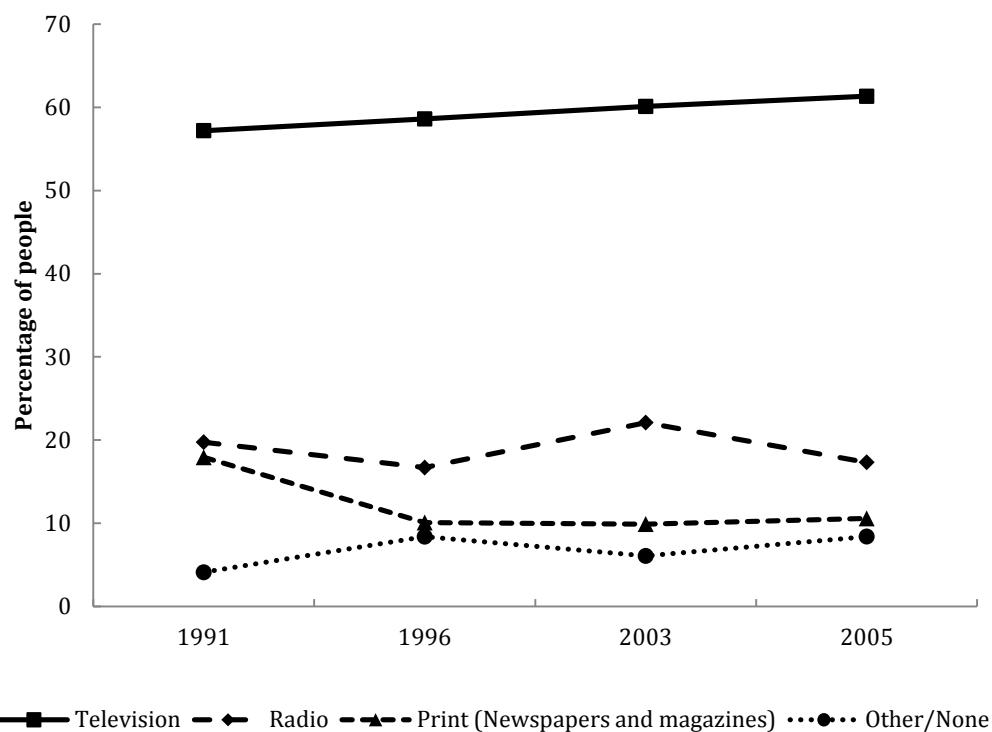
Sources: 2003; 2005, National Surveys of Political Culture and Citizen Practices (ENCUP).

⁵⁴ Among the set of *low news-user* cases are the United States (53 percent), France, Portugal, and Belgium (Norris, 2000). Plasser and Plasser (2002) also include Hungary, Poland, Slovenia, Slovakia, Australia, the Czech Republic, Rumania, Finland, Japan, the Netherlands, Luxemburg, Denmark, and the UK (Norris, 2000).

A number of comparative political communication and media studies on old and new democracies (Gunther and Mughan, 2000; Voltmer, 2006; Gunther et al., 2007; Dalton, 2008) have pointed to the worldwide emergence of television as ‘the preeminent, if not overwhelmingly dominant, source of national and international political news for the majority of the population’ (Gunther and Mughan, 2000: 402). The Mexican case is not an exception. According to most private and academic surveys, the majority of Mexicans rely either on television completely, or on television and a mixture of other media, as main sources for political news. Figure 7 shows the breakdown of Mexican media audiences by print, radio, and television from 1991 to 2005. According to the data, political media-use trends remained quite stable during the period, with two-thirds of Mexicans citing television as their most frequently used source of political information. In contrast, around one-fifth said radio was a main source of political news, and only some 10 percent said newspapers and magazines were a primary source.⁵⁵ *Television-centric* patterns of political media use in Mexico and other Latin American countries contrast sharply with those of advanced democracies, where, despite the wider access to television and its predominance as a source of political news among the mass public, print media still remain relevant, frequently used sources of political information (Dalton, 2008).

⁵⁵ Data from other comparable sources provide some different estimates. According to the ENCUP 2001 and 2008 surveys, around fourth-fifths of all Mexicans (89 percent) rely on television news programs as a source of political information (80 percent in 2001). However, people now increasingly get political information from other media. Some 50 percent of Mexicans say they get information from radio news programs (27 percent in 2001), 43 percent from newspapers (20 percent in 2001), 13.3 percent from magazines, and only 7 percent from the Internet (figures don’t add up to 100 percent because respondents were allowed to give more than one answer). The differences between surveys are in part a consequence of the different question texts and response options provided to respondents (i.e. whether the survey allowed for one or multiple answers).

Figure 7 Major News Sources of Political Information in Mexico



Sources: 1991 National Survey on Political Culture from the *Office of the President*; question asked was: 'What is the main medium do you use to keep you informed about politics?' 1996 (Pozas Horcasitas et al., 1996) *IFE/Instituto de Investigaciones Sociales, UNAM*. 'La reforma electoral y su contexto sociocultural' Table I.4; question asked was: 'Through which medium do you principally receive your information about politics?' 2003 and 2005 National Surveys on Political Culture and Citizen Practices (ENCUP); question asked was: 'What is the medium do you use the most to know what happens in politics?'

Although audience breakdown by education level shows that print media are now a main source of political news among the more affluent and educated sectors of the population, it also reveals that even the better-educated Mexicans mainly rely on television as a primary source (see Table 13). IBOPE-AGB television audience measurement data also indicate that exposure to TV news is more stable across time, and more equally distributed across all socioeconomic status groups, than other types of television watching (Jara Elias and Garnica Andrade, 2009).

Table 13 Most Important Sources of Political Information in Mexico (1991, 2003) (%)

Medium	1991		2003	
	Overall	College educated+	Overall	College educated+
Television	57.8	61.3	60.1	53.3
Radio	19.9	9.7	22.1	23.2
Print	18.1	25.8	9.9	19.4
Other/none	3.7	3.2	6.1	4
DK/NA	0.5	0	1.8	0.2
<i>Total</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>

Sources: 1991 National Survey on Political Culture from the Office of the President; 2003 National Survey of Political Culture and Citizen Practices (ENCUP).

Media market

From a monopolised to a still highly concentrated but competitive structure of media ownership

Since its emergence in the early 1950s, the Mexican television industry has increasingly tended towards market concentration. Unlike the American case, the development of the Mexican broadcasting system has been characterised by commercial expansion, but with very limited market competition. The PRI-regime's broadcasting policies and regulations systematically protected dominant broadcasters from the entry of new competitors into the market until the early 1990s. This was, in part, a mechanism to promote the expansion of the medium due to the obstacles posed by the limited size of the advertising market in the early years of its development, but also as a form of political control. In 1947, President Miguel Alemán (1946-1952) commissioned an engineer, Guillermo González Camarena, and a writer, Salvador Novo, to undertake comprehensive research on the technical, administrative, and financial features of the two most dominant broadcasting models in the world – the American commercial system and the British public-service model – in order to determine which one would be more appropriate to introduce into Mexico. After considering and prioritising technical and financial issues, Alemán decided that the more convenient model to implement was the commercial-oriented American system, and in 1949 granted the first commercial broadcasting licenses (*concessions*) to a small number of entrepreneurs linked to the regime.

During the early years of the television industry (1950-1955), private media entrepreneurs faced a number of major obstacles to the establishment of the commercial model relating to the limited availability of advertising and state financial support, which led them to combine their holdings in 1955 in order to create *Telesistema Mexicano*, the first Mexican *de facto* private television monopoly (Hernández Lomelí, 1996). In 1968, *Televisión Independiente de México*, a network owned by a group of Monterrey-based entrepreneurs, started operations. Both companies competed until 1973, when they finally merged into a single private network taking on the name *Television via Satellite (Televisa)*. The emergence of *Televisa* was also a response of private television owners to the communication policies of President Luis Echeverría's administration (1970-1976), which aimed to limit the private sector and establish a stronger state-owned media sector (Caletti Kaplan, 1988; Fox, 1990).⁵⁶ The development of the sector was nevertheless quite limited and halting. In contrast to other Latin American countries like Chile, where, despite neoliberal reforms, a strong public-service broadcasting sector was successfully established (Fuenzalida, 2000), in Mexico the public media never consolidated, and the opportunity for the establishment of a genuinely mixed broadcasting model finally vanished when most of the state-run media sector was privatised in the early 1990s.⁵⁷

Ultimately, *Televisa* held a quasi-monopolistic position in the market throughout the whole period of authoritarian rule, operating largely without significant competition for two decades. This allowed the company to consolidate its dominance not only over the private television sector, but

⁵⁶ State-owned media sectors were under-developed in most Latin American media systems – perhaps the only exceptions are Chile and Colombia (Catalán, 1988; Fox and Anzola, 1988; Fuenzalida, 2002; Rey, 2002) – but the Mexican media system was under-developed to an exaggerated degree in non-commercial media sectors (Caletti Kaplan, 1988). It was not until the administration of President Luis Echeverría (1970-1976) that the government established a national public television network (Channel 13), later on named *Imevision*.

⁵⁷ After that, what remained of the Mexican state-run television sector was in fact minimal. The administration of President Miguel de la Madrid (1982-1988) established several small, regional, state-run TV stations as part of a broader decentralisation program. Most of them persist until the present day; nevertheless, they lack infrastructure and political and financial autonomy. Thus, rather than following a public-service model, they remain highly controlled, used for propagandistic purposes by local executives (Hughes and Lawson, 2004; Hughes, 2006).

also over other media industries, until it became the largest multimedia conglomerate in the Spanish-speaking market, and the second largest in Latin America (just behind the Brazilian *Rede Globo*). Its interests lay beyond television and radio production and broadcasting, extending to other media and entertainment industries such as publishing, film and music production and distribution, cable television, direct-to-home satellite television, dubbing, Internet content, sports, etc. (Mancinas Chávez, 2008). Of course, this amazing expansion and consolidation was only possible due to systematic government protection from competition, since legislation never took away *Televisa's* concessions nor encouraged the development of competitors until 1993, when the administration of President Carlos Salinas de Gortari (1988-1994) privatised the state-owned national television network, *Imevision*, as part of a broad economic liberalisation program which was at the centre of his neo-liberal economic reform policies. As Fox and Waisbord note, this was in fact the dominant trend in the region: '[d]uring the 1990s the participation of state and public interests in the media shrank and market principles consolidated. Privatisation became the policy *du jour* in the television industry. Governments in Argentina and Mexico auctioned state-owned television stations that had been nationalised in the early 1970s' (Fox and Waisbord, 2002: 306). Even in Chile, the public sector developed with a market-driven logic (Fuenzalida, 2000).

The emergence of a second private television network with national reach, *TV Azteca*, brought with it the rise of commercial competition within the private sector. This, in turn, played an important role in media opening, and fostered a major change from an authoritarian to a market-driven newsmaking model (Lawson, 2002; Hughes, 2006, 2008). Before the emergence of *TV Azteca*, *Televisa's* audience share was about 80 percent (Beltrán, 2007). However, despite this significant shift in media ownership patterns, the Mexican broadcast television's ownership structure remains (alongside that of Brazil – see Fox, 1990; Capparelli and Dos Santos, 2002) the most concentrated in Latin America, and among the most concentrated in the world, since two commercial broadcasters, *Televisa* and *TV Azteca*, share a virtual duopoly of the Mexican free-to-air private television sector. Together, these two companies control 97 percent of the country's 461 commercial television

stations (Mancinas Chávez, 2008) (see Table 14). Currently, there are 277 non-commercial TV stations, but they do not constitute a counter-weight to the private networks. Most of them are small, local networks that lack financial resources and the infrastructure to enable them to increase their audience share, which remains minimal (see Table 15).

Table 14 Television Infrastructure Concentration in Mexico (2007)

TV Stations

Non-commercial	277
Private/Commercial	
<i>Televisa</i>	257 (56%)
<i>TV Azteca</i>	189 (41%)
Other	15 (3%)
<i>Total</i>	461

Source: Mancinas Chávez (2008).

The Mexican television industry is not only highly concentrated in terms of the number of families who own television enterprises, but also in terms of the number of people (size of the audience) who are exposed to and affected by the messages of such enterprises. *Televisa's* average audience share on its four national broadcast channels (Canal 2, Canal 5, Canal 9, and Mexico City's 4TV) and local affiliated networks is around 68.5 percent.⁵⁸ And *TV Azteca's* two national channels (Canal 7 and 13) and local affiliated networks reach 28.3 percent of the audience share (Trejo Delarbre, 2010b). The two networks control 97 percent of the audience share of paid and open television, and 99 percent of the advertising market.⁵⁹ According to the *Herfindahl-Hirschman Index* (HHI), a commonly accepted measure of market concentration, the Mexican private broadcast television

⁵⁸ *Televisa's* audience averaged 70 percent from 2004 to 2007 (*Televisa*, 2007), and, as of December 31 2009, the company's broadcast television channels had an average sign-on to sign-off audience share of 70.8 percent (Reuters) <http://www.reuters.com/finance/stocks/companyProfile?rpc=66&symbol=TV>.

⁵⁹ Television is the predominant advertising medium in Mexico, with approximately 68 percent market share in 2009, compared with 10 percent for print media (newspapers and magazines) – the second most important advertising medium by revenues. Free-to-air TV constitutes over 90 percent of total TV ad revenues.

sector is a highly concentrated market (see Table 15).⁶⁰ This constitutes one of the major dangers to media pluralism and diversity, since it substantially limits citizens' choices and sources of political information.

Table 15 Audience Share Concentration in Mexico

	<i>Audience share (%)</i>	<i>Square of market shares</i>
Televisa	68.5	4692.25
TV Azteca	28.3	800.89
Other private and public networks	3.2	10.24
<i>Total</i>	<i>100</i>	* <i>HHI = 5.503</i>

Source: Trejo Delarbre (2010b) with data from IBOPE AGB Mexico.

Decades of systematic government protection from competition, lack of legal limits on media concentration, and the continuous and unregulated monopolistic expansion of the commercial broadcasting sector have made it extremely difficult for policy makers to attempt any reform of the media regulatory framework in order to facilitate a more competitive, private media market, or a sustainable, mixed broadcasting system. The governmental communication policies of the PRI and other parties were substantially limited by the foundational decisions that previous post-revolutionary governments had made, making it very difficult to distance themselves from the predominantly privately owned and profit-oriented original path. To date, despite several failed attempts at reform, the laws and regulations that influence print-media content and broadcast laws

⁶⁰ The Herfindahl-Hirschman Index of market concentration (HHI) is a measure of the size of firms in relation to the industry, as well as an indicator of the amount of competition between them. It is calculated by summing the squares of the individual market shares of all the participants in a given industry. The HHI score can range from close to zero to 10,000. Increases in the HHI usually indicate an increase in market concentration and a decrease in competition, and vice versa. For instance, if there were only one company in a given market, with a market share of 100 percent, the HHI score would equal 10,000, indicating a monopoly. Or, if there were a large number of very small, competing firms with roughly equal market share, the HHI score would approach zero, indicating a competitive market with no dominant players. According to the U.S. Department of Justice and the Federal and the Trade Commission guidelines for assessing potential mergers, a HHI score below 1,000 indicates a non-concentrated marketplace, a score between 1,000 and 1,800 indicates a moderately concentrated market, and a score above 1,800 indicates a highly concentrated market. Guidelines available at: [http://www.justice.gov/atr/public/guidelines/horiz_book/hmg1.html].

and regulations have remained essentially unchanged for more than six decades (see, for an overview of the several attempts to reform the regulatory framework of the mass media, Ávila Pietrasanta et al., 2002; Orozco Gómez, 2002; Gutiérrez López, 2005; Mancinas Chávez, 2008).

State-media relationships and media freedom

From an authoritarian to a hybrid media system

Influential comparative studies on media systems in advanced democracies point to the role of the state as a crucial dimension for understanding the development of media systems in a range of established (Hallin and Mancini, 2004b) and new democracies (Voltmer, 2006, 2008). In contrast to the limited role of the state in the process of mass-media expansion in the U.S., in Latin America the state was as a central actor in the development of the mass media for much of the 20th century. The media economics of private print and broadcast media in the region remained heavily dependent on state patronage, rather than just on market dynamics, as in the United States. Limited market wealth, the large number of state-owned enterprises, and the broad state control over key resources that affected commercial media finances constituted powerful incentives for media owners to keep close ties with the state (Waisbord, 2000). This, in turn, granted the state and political elites a substantial amount of control over and capacity to intervene in media organisations, which had tremendous consequences for media freedom across the region.

In his comparative study on the state of Latin American media systems in the early 1980s, Alisky classified the countries under analysis into three categories, based on the type and degree of government control of the media: cases with press freedom, cases with censorship, and an intermediate category of countries with ‘media guidance’, such as Mexico. He argued that the Mexican case was characterised by ‘institutionalized control mechanisms from a political and economic establishment that can permit relative press freedom but still guarantee support for the revolutionary coalition which has dominated Mexican public life for more than sixty years’ (1981: 27).

In fact, even as late as the early 1990s, Mexico had a predominantly privately owned, profit-oriented, authoritarian media system in which media organisations were not independent of, but subservient to, the PRI-led regime (Lawson, 2002; Hughes, 2006, 2008).⁶¹ As in the case of the existence of some other allegedly democratic institutions, such as political parties and periodic elections, the regime allowed for some degree of ideological pluralism, and even occasional criticisms of government actions and policies within the system, without compromising official media control. Similar to the presence of several factors restricting effective party competition without the need to use outright repression or electoral fraud, the regime also had a number of soft, but very effective, control mechanisms undermining press freedom and pluralism that rendered the overt and brutal methods of media control characteristic of fully closed authoritarian regimes largely unnecessary.

This is not to say that the regime did not employ more direct and traditional forms of press control and manipulation – involving harassment, physical threats, or violence against journalists or media facilities, censorship, etc. – especially in cases where the independent media refused to provide only favourable coverage of government policies and actions and/or endorse official party candidates. More often than not, however, government control relied on more subtle mechanisms relating to the political economy of news production, and based on collusion between media owners

⁶¹ The category *authoritarian media system* was initially proposed by Siebert, Peterson, and Schramm (1956) in their early and influential study on media systems, intended to describe media-state relations usually found in developing, non-democratic countries. They defined it as a system where journalists are rendered subservient to the state in the interests of maintaining social stability and national cohesion, a system characterised by a more direct form of state ownership and control over radio and television, the underdevelopment of commercial and non-profit broadcasting sectors (public and community media), and a limited audience share of the independent media. The other three categories are the libertarian media system (predominant in the U.S.), the socially responsible system (characteristic of Western Europe), and the Soviet system. The Mexican media system loosely resembled the authoritarian archetype proposed by Siebert et al., since, like many other Latin American countries, the state's communications policy followed the privately owned, commercially financed path originally developed in the United States, rather than a public-service model based on more direct forms of state ownership and regulation characteristic of Western European countries (Caletti Kaplan, 1988; Fox, 1988b:a, 1990). However, as Fox and Waisbord point out (2002), the Latin American (including the Mexican) model of commercial broadcasting is quite similar to that developed in the United States, but only superficially, since it is considerably more concentrated, with one or more large companies controlling a significant market share.

and the PRI-state (Lawson, 2002; Hughes, 2006). Due to their considerable expansion and penetration, especially when compared to the under-development of non-profit media sectors (Caletti Kaplan, 1988), the commercial media were instruments not only for legitimising one-party rule, but also for ensuring substantial private gain (Lawson, 2002). In Mexico, as in many other Latin American countries, both print and broadcast media were predominantly controlled by a small number of entrepreneurial families, who recurrently courted the state to obtain substantial benefits in exchange for political loyalty (Waisbord, 2000). A large public sector, and the broad control retained by the PRI-state over important resources on which media finances significantly depended, constituted powerful incentives for a mutually beneficial rather than adversarial relationship between PRI politicians and media owners, who, although they frequently praised the liberal principles of private property and profit-making, remained, like many other sectors and groups of society, fully incorporated into the PRI's patronage system, receiving substantial subsidies, economic rewards, and concessions in return for passive and non-critical reproduction of regime messages (Hallin, 2000b; Lawson, 2002).

Profit-seeking goals of private media entrepreneurs were highly dependent on a number of selective incentives provided by the PRI state, involving allocation of government advertising, preferential tax treatment, subsidies and inputs into news production (including access to communications infrastructure), protection from commercial competition, etc. (Hughes, 2006). However, while print-media incentives usually focused on bulk purchases by government agencies, the direct channelling of public funds, tax exemptions, subsidised utilities, credit at below market rates, cheap newsprint, and free services from the government-owned news agency *Notimex*⁶²

⁶² For instance, the state retained broad direct and indirect control over the advertising revenues of most print media. Such factors proved very effective, due to the underdevelopment of the print-media industry (in terms of its limited audience share). The dependence of print media on official advertising made them tremendously vulnerable to government pressures. Despite the relatively subtle nature and somewhat selective application of media-control mechanisms, they proved very effective in controlling the press. Most often, journalists avoided investigating controversial topics or publishing information on sensitive issues (such as official corruption, drugs trafficking, electoral fraud, etc.) (Lawson, 2002).

(Lawson, 2002), with television, government control relied principally on factors related to the broadcasting regulatory framework and the concentrated structure of ownership of the market. Broadcasting regulations gave the federal executive branch of the government broad sanction functions and discretion to award, renew, or withdraw broadcasting concessions. Thus, although private electronic media revenues depended primarily on market forces (paid-for advertising from private enterprises), they were extremely vulnerable to government pressures and, therefore, even more supportive of the ruling party than their print counterparts.

In general, the government allowed the print media substantial room to manoeuvre, not only because state intervention in broadcasting media was easier to conceal, but also because the print media had limited penetration, and so posed a much more insignificant threat to the ruling party. In fact, until the mid-1990s television news content remained tightly controlled by the government, thanks to the comfortable relation between the ruling party and the owner of the private quasi-monopoly *Televisa*, which supplied the government with the sort of non-critical and favourable coverage provided by government-controlled national and local television outlets (Hughes and Lawson, 2004). Authoritarian media controls generated media content that systematically supported official/PRI government actions, policies, and candidates. However, I shall focus here on the consequences of governmental control of the media for political competition. Most of my analysis is devoted to changes in media coverage of election campaigns, and particularly on television – due to the pre-eminence of this medium as a source of political information for the Mexican electorate. The argument is that, as shown by all the recent transformations in the media system analysed in this chapter, changes in television news coverage during the 1990s were the most proximate factors behind the rise of media-centred campaign practices.

Barriers to Media-centred Political Competition

Electoral coverage asymmetries and limited party access to broadcasting

Limited access to the media is one crucial aspect of uneven electoral playing fields in competitive authoritarian regimes. As Levitski and Way (2010) argue, a skewed playing field can seriously undermine democratic political competition. ‘When the opposition is systematically denied access to finance and major media outlets, competing in elections—even clean ones—is an uphill battle’ (Levitski and Way, 2010: 57). Liberal theories of the press have long stressed the role of free and independent media in promoting pluralistic voices, elite accountability, and popular control of democratic government by providing citizens with relevant political information and a diversity of viewpoints which allow them to make informed choices, particularly during elections (Gunther and Mughan, 2000). In their outstanding comparative analysis of modern campaign innovations worldwide, Swanson and Mancini (1996a: 266) conclude that ‘the factor which seems to determine television’s influence in campaigns more than ownership or audience size is the degree of journalistic autonomy that television services exercise in electoral reportage’. Accordingly, they identified three different roles that television plays in election campaigns, based on the presence or absence of media autonomy and the extent of state control or influence over television.

One role television can play is that of a passive conduit through which information passes from politicians to the public without significant mediation or interpretation by journalists. [...] At the other extreme is the case where television takes a blatantly partisan role, urging preference for one or another party or candidate. [...] The third and most common role for television in the countries we examined is also the role most associated with the modern model of campaigning, namely, as an independent voice and co-actor in the electoral process (Swanson and Mancini, 1996a: 266-267).

For most of the authoritarian period, the Mexican media were much closer to the second than to the third role identified by Swanson and Mancini. Rather than being the watchdogs of free and fair competitive elections by offering information on a choice of parties, personalities, and policy issues to voters, the role of the media during election campaigns was limited to presenting them with a

façade of democratic political competition (Adler 1993; Hallin 1995; Trejo, 2001; Lawson, 2002; Hughes, 2006). The regime's mechanisms of media control ensured that establishment candidates could enjoy almost total collaboration with the print and broadcast media (particularly of the television quasi-monopoly *Televisa*) in their campaign efforts. While PRI nominees both for executive and legislative posts received as a matter of course the majority of news coverage, and in a purely positive tone, opposition parties' candidates were at best ignored (Fregoso Peralta, 1991; Trejo Delarbre, 1991a; Acosta Valverde and Parra Rosales, 1995; Aguayo and Acosta, 1997; Trejo Delarbre, 2001; Lawson, 2002; Hughes, 2006; Lomnitz et al., 2010).

Pro-government bias during elections in the print media is well-documented, but it was even more accentuated in television (Trejo Delarbre, 2001; Lawson, 2002; Hughes, 2006). For instance, Hughes (2006) estimates that in the 1982 presidential contest the PRI received 70 percent of the votes, but almost 90 percent of the total television coverage.⁶³ In the 1988 presidential election the trend remained similar, with the PRI taking almost 92 percent of the total, even though it only managed to get 50 percent of the votes (Arredondo Ramírez, 1991b) (see Figure 8). Television campaign coverage was grossly skewed in favour of the dominant party and its candidates, not only in quantitative but also in qualitative terms. While the PRI nominees were treated with enthusiasm and even deference, opposition candidates were often dismissed or denigrated (Adler, 1993; Lomnitz et al., 2010). In sum, electoral competition during the authoritarian period was not only characterised by massive resource asymmetries between the dominant party and the opposition, because of the government's systematic diversion of public resources for partisan use (Greene, 2007), but also by authoritarian media-control mechanisms, which produced large electoral-coverage asymmetries between establishment and opposition candidates.

⁶³ Estimated based on observation of state-owned Channel 13 by Ortiz Pinchetti (1982), and general statements concerning the lack of pluralism in TV electoral coverage.

Election news coverage asymmetries were not the only obstacle to opposition parties' campaign communications. Even as late as the early 1990s, private broadcasters systematically refused opposition parties paid advertising. Media bias in favour of the PRI, and lack of media access, were both openly denounced in the 1988 presidential election by Cuauhtémoc Cárdenas and Manuel J. Clouthier, the FDN and the PAN presidential candidates respectively. The latter even asked voters to boycott *Televisa*'s programs, products, and sponsors in response to the network's biased coverage and refusal to sell time to opposition candidates to broadcast their campaign messages (Arredondo Ramírez, 1991a; Trejo Delarbre, 1991b; Hallin, 1994; Lomnitz et al., 2010).

Thus, although by the mid-1990s the structure of the electorate and its patterns of voting behaviour already reflected an increasingly competitive market for votes (see Chapter 4), the media market still remained rigged towards the dominant party, provided biased electoral coverage, and rejected opposition parties' requests for paid political advertising. This collusion between the media and the dominant party not only prevented the media from providing a level playing field for all parties, but also limited the media's capacity for playing a more decisive role on campaign dynamics. By the end of the decade, however, the authoritarian media system had been replaced by a hybrid system in which different and competing models of news production coexisted, involving authoritarian, civic, and market-driven approaches (Lawson, 2002; Hughes, 2006). This transformation, in turn, fostered the media's autonomy and prominence in the electoral process.

Changes in Electoral Coverage and Political Parties' Media Access

A number of studies show that both print and broadcast news-media organisations moved toward greater pluralism in electoral reporting during the 1990s, as a result of political and economic liberalisations (Trejo Delarbre, 2001; Lawson, 2002; Hughes, 2006). One of the key factors shaping media opening in the broadcast television sector was the rise of commercial competition due to the privatisation of the state-owned national television network (Lawson, 2002). After the emergence of a second national private network – *TV Azteca* – the role of Mexican television in the democratisation process was transformed rapidly and dramatically, from being legitimising, passive,

and non-critical to becoming more autonomous, critical, and active with respect to the PRI-regime. The new network did not conduct markedly different news-reporting to *Televisa*, nor followed a civic or public service model. Rather, it prioritised the entertainment over the information function by adopting a market-driven, tabloid model of news reporting (Hallin, 2000a:b; Hughes, 2006).

This nevertheless proved highly effective in generating a perceived independent image among the public, and three years after its launch it managed to become a real competitor to *Televisa*. Its audience share increased from 2 percent in October 1993 to around 9 percent two years later, which was also reflected in its increasing share of the advertising market. By late 1996, *TV Azteca* reached an audience share of around 30 percent (as well as an annual average of 28 per cent at night) (Lawson, 2002). The network's impressive growth was also seen in the broadcast TV news market, where its nightly news program, *Hechos* (*Facts*) took a leading position in audience preferences with respect to its *Televisa* competitor, *24 Horas* (*24 Hours*). According to survey data on patterns of media use in 1996, 36 percent of Mexicans watched *TV Azteca's Hechos*, while only 14 percent preferred *24 Horas*. Three years later, *Hechos* (29 percent) remained ahead of *Televisa's El Noticiero* (23 percent) in audience preferences (Hughes, 2006).

Televisa's responses to increasing market competition involved a number of strategies – including a major reorganisation of its news division, changes in the anchors, and greater independence in news coverage – which saw a substantial decline in the percentage of time devoted to officialdom, a more balanced coverage of election campaigns in its newscasts, and the adoption of tabloid-style formats of news reporting (Hallin, 2000a; Lawson, 2002; Hughes, 2006).⁶⁴ However, it was not until 2000 that *Televisa's* strategies achieved success in bringing the network back to the leading position in audience preferences, when *El Noticiero* secured a 35 percent audience share

⁶⁴ Lawson's (2002) content analysis of *Televisa's* newscasts in *24 Horas* from 1986 to 1996 shows a decline in the percentage of time devoted to officialdom. Coverage of official spokespeople – government and ruling-party officials – dropped from an average of 63 percent before the introduction of *TV Azteca* in 1993, to an average of 40 percent subsequently.

versus *TV Azteca's Hechos*, with 31 percent (Hughes, 2006). Audience measurement data also indicate that during the presidential campaign of 2000, *Televisa's* news programs averaged nearly double the audience of *TV Azteca's* newscasts (13 percent rating points versus 8 percent) (Beltran, 2007).

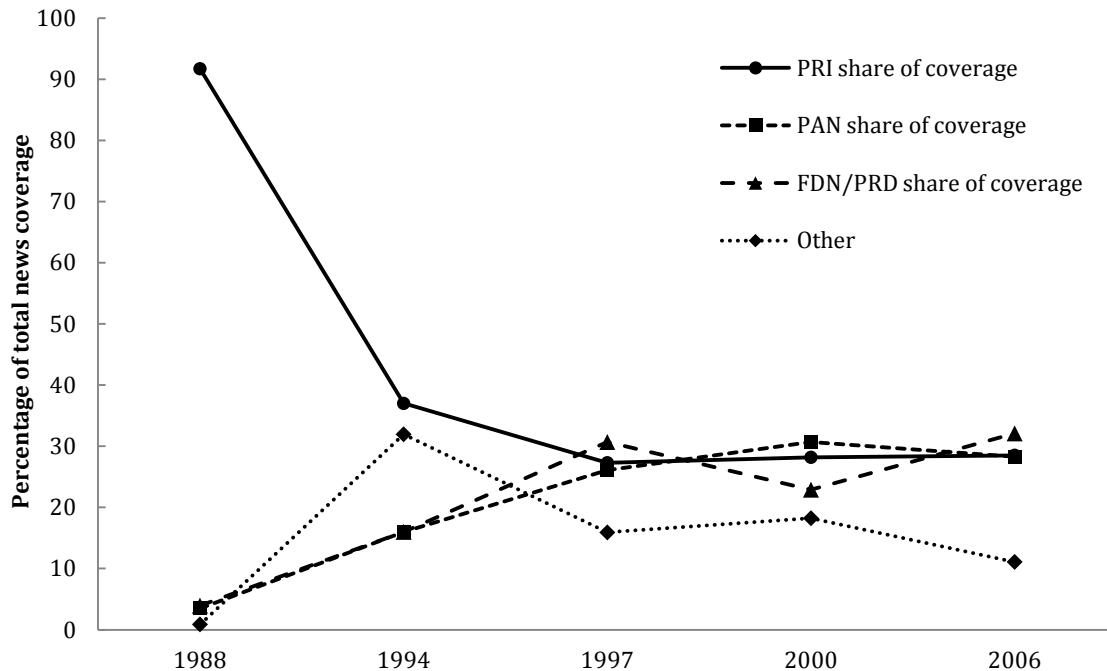
It should be noted, however, that even after the emergence of *TV Azteca*, bias in news-media coverage persisted in the 1994 presidential contest, albeit to a lesser extent than in previous elections. The PRI still occupied more media time, with 37 percent of the total compared to the PRD's 16 percent, and the PAN's 16 percent (see Figure 8). Moreover, although the two main networks gave substantially more coverage to the opposition than before, a number of studies have demonstrated that electoral reporting was qualitatively biased towards the PRI's presidential candidate to a considerable extent (Hallin, 1994; Trejo Delarbre, 1994; Acosta Valverde and Parra Rosales, 1995; Trejo Delarbre, 1995; Aguayo and Acosta, 1997; García Calderón and Figueiras Tapia, 2006). For instance, Hallin's (2000b) analysis of *Televisa's* campaign coverage shows that, while news stories on Zedillo's campaign were generally full of colour and enthusiasm, those on the campaigns of opposition candidates were dull at best. He provides a particularly illuminating example.

Shortly before the election, the Cárdenas campaign held a vast rally at the National Autonomous University in Mexico City, which served to kick off the final phase of its campaign. *Televisa's* report was edited to show nothing but tight shots of Cárdenas at the microphone, with the hundreds of thousands of cheering supporters entirely invisible to the television audience (Hallin, 2000b: 100).

As Hallin (2000) argues, the qualitative bias in electoral coverage was partially explained by the dominant party's advantages in terms of resources, organisational capacity, and expertise in producing campaign events. However, *Televisa's* manipulation of information also contributed substantially to the 'news management' of the ruling party. It was not until the 1997 mid-term elections that the media arena finally became level, and when the three major parties received roughly equal coverage from the two main networks. The PRI's share of coverage even fell, for the

first time, below the coverage obtained by an opposition party: it received 27 percent of air time, the PRD got 31 percent, and the PAN, 26 percent (see Figure 8).

Figure 8 Television News Coverage of Election Campaigns in Mexico, 1988-2006 (%) (two main networks)



Sources: For 1988, figures are reported for *Televisa's 24 Horas* and *Imevisión's Día a Día* (Arredondo Ramírez, 1991b). For 1994, figures are reported for *24 Horas* and *TV Azteca's Hechos* (Acosta Valverde and Parra Rosales, 1995), with data from *Alianza Cívica/Academia Mexicana de Derechos Humanos* (Civic Alliance/Mexican Academy of Human Rights, AMDH). Other estimates using the same dataset come from Aguayo and Acosta (1997), Trejo Delarbre (2001), and Lawson (2002). Additional estimates that come from the *Instituto Federal Electoral* (Federal Electoral Institute, IFE) give similar figures (Trejo Delarbre, 2001). For 1997, figures are reported for *24 Horas* and *Hechos*, with data from the IFE. Additional estimates come from Lawson (2002), with data from the AMDH. For 2000, figures are reported for *Televisa's El Noticiero* and *TV Azteca's Hechos*, with data from the IFE. Other estimates are by the *Reforma* newspaper, and the electoral coverage study of the *Massachusetts Institute of Technology* (MIT) (Lawson, 2004). For 2006, figures are reported for *El Noticiero* and *Hechos*, with data from the IFE. Additional estimates come from the *European Union Election Observation Mission* (Trejo Delarbre, 2010a).

Moreover, ever since the 1993 electoral reform eliminated the discretionary power of private media owners to decide whether or not to sell time to opposition parties and candidates for political advertising, and after the electoral reform of 1996 provided opposition parties with substantial public funds for their electoral campaign efforts, these parties were also able – and allowed – to buy air time to broadcast their campaign ads (Aceves González, 2000) (see Chapter 6). Thus, while the PRI's patronage resources gradually declined during the 1980s and 1990s, the resources of the

opposition parties increased to the extent that they could be welcomed as consumers buying airtime on the private radio and television networks. As a result, political media access in the late-1990s contrasted sharply with the situation in the 1988 presidential election, when the opposition parties' presidential candidates denounced pro-government media bias, and railed against private media owners' rejection of their attempts to purchase air time to broadcast their political ads. By contrast, in the 1997 elections the opposition parties' media spending surpassed that of the PRI, which spent only 111-million pesos, compared to the more than 150-million pesos spent by the opposition (Lozano, 2006) (see Chapter 6).

Table 16 Total Television Air Time in the 2000 Presidential Election by Parties, Channels 2 and 13 (%)

	Paid advertising	News coverage	Total
PAN	19.5	30.7	26.0
PRI	50.0	28.2	37.3
PRD	27.0	22.9	24.6
Other	3.4	18.2	12.0
<i>Total</i>	<i>100 (21 hours, 31 min)</i>	<i>100 (29 hours, 51 min)</i>	<i>100</i>

Source: Trejo (2001), Advertising: *Reforma*. Coverage: IFE.

Most academic studies based on diverse monitoring of the newscasts of the two national television networks during the 2000 election show that electoral reportage was basically unbiased, since all leading candidates received fairly similar air-time in the major networks' newscasts (Lozano, 2001; Trejo Delarbre, 2001; Lawson and McCann, 2005; Hughes, 2006; Beltrán, 2007) (see Table 16). These studies also show that media coverage was balanced not only in quantitative but also in qualitative terms. According to *Reforma*, the tone of the coverage received by the three major candidates was similar, with only a few small biases (e.g. *Televisa* treated the PRD candidate, Cuauhtémoc Cárdenas, somewhat more positively than the PAN candidate, Vicente Fox, and the PRI candidate, Francisco Labastida; *TV Azteca* was slightly biased towards Labastida) (Beltrán, 2007) (the MIT/Lawson content analysis shows different results, and reveals a Fox bias in *TV Azteca*'s coverage). In sum, even though monitoring sources revealed some differences in the tone of coverage between the two main networks, it is unlikely that biases were the result of authoritarian media-control mechanisms, as in

the past, but a function of factors related to more autonomous news values on the part of news-media organisations, and, possibly, news management strategies on the part of campaign organisations.

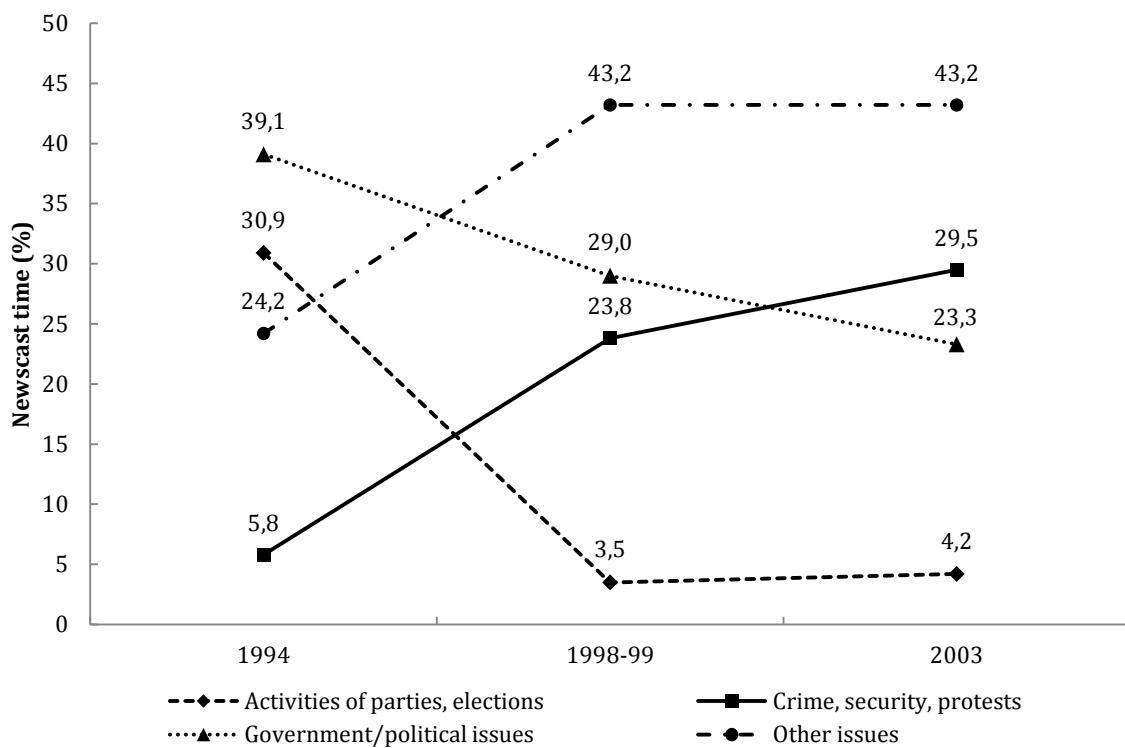
Hence, although the patterns of political media access in the 2000 presidential election still favoured the dominant party in terms of paid media access (see Table 16), they reflected a much more open media environment than had pertained previously. Moreover, the balanced news coverage significantly compensated for the differences in paid media access between the PRI and the opposition. Research on media effects in that election shows that although ‘media effects occurred through a cumulative process where ads and news coverage acted together’, exposure to news appears to have been more important than ads in shaping voting intentions throughout the campaign (Beltrán, 2007: 37) (for more on the impact of media coverage on voting intentions in the Mexican case, see Lawson, 1999; Lawson, 2002, 2004b; Lawson and McCann, 2005). Studies on election coverage in the 2006 election also reveal that it was also essentially fair (Klinger, 2007; Lawson, 2008; Trejo Delarbre, 2010a). We can say, then, that the patterns of media coverage and parties’ access to the media from 1997 onwards greatly reflected Mexican’s new electoral pluralism, and the triumph of the commercial media logic over the authoritarian political logic (Hallin, 2000b; Lawson, 2002; Hughes, 2006).

Infotainment

The market-driven transformation of Mexican television also brought with it a number of infotainment trends in television news coverage, involving the tabloidisation of the news agenda (Hallin, 2000a; Hughes, 2006) and the spectacularisation of campaign coverage (Lozano, 2001; Mendé Fernandez and Smith Pussetto, 2001; Mendé Fernandez, 2003). The use of tabloid-style formats was initially introduced by *TV Azteca*, but it soon became part of *Televisa*’s strategic responses to greater market competition. Tabloidisation was demonstrated in the increase in news coverage of crime, security issues, and protests – as public disturbances – and the decline in the

volume of political coverage in general, and of electoral issues in particular, from 1994 to 2003 (see Figure 9).

Figure 9 Tabloidisation of the News Agenda: Newscast Time by Subjects (%) (two main networks)



Sources: Figures for 1994 are reported for *Televisa's 24 Horas* (Hallin, 2000a); for 1998-99, figures are reported for *Televisa's El Noticiero* and *TV Azteca's Hechos* (Hallin, 2000a); for 2003, figures are reported for *Televisa's El Noticiero* and *TV Azteca's Hechos* (Hughes, 2006).

Hughes notes that, although electoral coverage was not absent from television screens, much of it became more personality-focused, and 'migrated to tabloid-style television formats outside the mainstream newscasts [...] in an attempt to make electoral information more attractive to viewers' (2006: 163). The new infotainment genres included human-interest candidate profiles, quiz shows featuring candidates as contestants, 'soft news' and 'reality news' shows, and so forth. On the other hand, election coverage on regular newscasts also changed substantially, resembling infotainment trends that can be observed to have taken place in the United States, Australia, Western Europe, and other Latin American countries since the 1980s, involving, according Plasser and Plasser (2002: 77):

- *The tendency toward a high degree of personalization of reporting.* A political system featuring ‘stars’ and elections representing personal plebiscites are the characteristics of an editorial logic, which defines politics primarily as a ‘game between persons’ and political ambition as a personalized competition between elite players.
- *The tendency toward downplaying of issues.* During the course of a campaign controversial questions and positions are increasingly replaced by tactical analyses, the discussion of style and the TV performance of the top candidates as well as speculations about future coalitions.
- *The tendency toward negativism.* Affairs, scandals and mistakes as well as a clearly critical note regarding the power elite are serving the journalistic news values better than the analysis of contents and programmatic positions. The tendency of some top candidates toward *negative campaigning*, that is, a campaign style geared toward open attacks, and the ‘built-in’ negativism of the campaign news reports are therefore reinforcing each other and adding an increasingly adversarial tone to the election campaigns.
- *The tendency toward sportive dramatization.* The excessive use of survey data and speculative comments regarding survey results are supposed to create a sense of tension and excitement in order to meet the dramaturgical needs of newsmakers. This type of *horse race journalism* is no longer limited to the United States. In the meantime *precision journalism* has developed into an internationally prominent genre of campaign reporting.

A number of studies examining the patterns of media coverage of election campaigns reveal that such coverage is actually catching up with the aforementioned global trends (Lozano, 2001; Mendé Fernandez and Smith Pussetto, 2001; Mendé Fernandez, 2003; Lozano, 2004; Lawson, 2008) (see, for a comparative study of election news coverage in democracies around the globe, Strömbäck and Kaid, 2008). For instance, Lozano (2001: 30) analysed the extent to which campaign reporting in the 2000 Mexican presidential election reflected ‘spectacularisation’ trends similar to electoral coverage in other regions of the world, involving personalisation, dramatisation, fragmentation, and normalisation. His content analysis shows that media coverage of the campaign was, in general,

characterised more by ‘spectacularisation’ frames than by issue frames.⁶⁵ Television newscasts nevertheless proved to be most inclined to spectacularise (see Table 17).

Table 17 Spectacularisation of Electoral Coverage in Mexico’s 2000 Federal Elections (%)

	Press		Television	
	Spectacularisation	Party platforms/ Policy issues	Spectacularisation	Party platforms/ Policy issues
All the news item	23	8	49	9
Part of the news item	46	34	37	22
None of the news item	31	58	14	69
<i>Total</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>
	<i>(N = 280.403 cm²)</i>		<i>(N = 59.598 seconds)</i>	

Source: Lozano (2001).

TV news items devoted entirely to political scandals, smears, disputes and attacks between parties/candidates, soundbites, and photo opportunities amounted to around half of the total election coverage. By contrast, the proportion of election stories totally dedicated to policy issues and/or party platforms was only 9 percent of the total coverage. Spectacularisation trends in campaign reporting were also predominant across the two main networks’ nightly newscasts (see Table 18).

⁶⁵An ‘issue frame’ can be defined as information on issues, be they candidates’ policy proposals or party platforms. On the other hand, a ‘spectacularisation’ frame can be defined as ‘electoral information with elements of personalization, dramatization, fragmentation and/or normalization [...] emphasizing the fight between personalities, charisma and the candidates’ verbal skills to criticize and disqualify the adversary, opinion polls representing the competition between candidates (the so-called “horse race”), activities designed specifically for the media (the so-called “pseudo-events”, which would not exist without the presence of reporters and television cameras), presentation of facts and issues in the form of “soundbites” [...], mentioning only isolated facts without putting them into perspective [...] as well as the candidates’ presentation of fast and simplistic solutions that allow the return to “normal” during the campaign’ (Lozano, 2001: 38).

Table 18 Spectacularisation of Television Electoral Coverage in Mexico's 2000 Federal Elections (%) (two main networks)

	<i>Televisa/El Noticiero</i>		<i>TV Azteca/Hechos</i>	
	<i>Spectacularisation</i>	<i>Party platforms/ Policy issues</i>	<i>Spectacularisation</i>	<i>Party platforms/ Policy issues</i>
All the news item	44	21	48	5
Part of the news item	28	22	46	41
None of the news item	28	57	6	54
<i>Total</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>
	<i>(N = 17.023 seconds)</i>		<i>(N = 13.131 seconds)</i>	

Source: Lozano (2001).

Factors driving media opening and shifts in election news coverage

The increasing media opening to opposition parties' electoral communications, and the resulting changes in media coverage discussed above, were the result of a complex combination of factors. On the one hand, democratisation dynamics involved substantial pressure from opposition parties, civil society, and the government (through politico-electoral reforms) over media enterprises (Hallin, 2000, Trejo, 2001). Civic organisations like *Alianza Civica* (Civic Alliance), opposition parties, and electoral institutions which emerged from the democratisation process, like the IFE, leant heavily on *Televisa* and *TV Azteca* to produce fairer and more balanced electoral coverage. Following the 1994 election, diverse civic organisations carried out a monitoring of media coverage during election campaigns, exposing media bias in favour of PRI candidates. In combination with opposition parties' demands for media accessibility, their actions helped to put the issue of political bias of the media on the agenda. More recently, as a result of the 1996 electoral reform, the IFE has conducted extensive monitoring of electoral reporting in the print and broadcast media during elections as part of a conscious attempt to ensure more balanced campaign coverage.

On the other hand, Lawson (2002) has shown that, in addition to civic pressures and political reform, the privatisation of *Imevision*, the state-owned television network, during the administration of President Salinas was key in fostering media accessibility by shaping a less concentrated structure of media ownership, which brought with it increased commercial competition between the various television outlets. Because of the predominant role of television as a source of political information

for the Mexican public, *Televisa* and *TV Azteca* needed to compete for credibility and appeal to the preferences of a more sophisticated and demanding audience, especially in times of economic crisis; this forced them to adopt a more autonomous and adversarial position with respect to the PRI-regime. Certainly, as Pfetsch (2004: 356) notes, the degree of commercial competition is a decisive factor shaping media freedom.

Media organizations in highly commercialized media systems obey profit-oriented imperatives of maximum audience reach and thus higher advertising revenues. Although commercial systems are also subject to certain regulative mechanisms, the market-economy logic is at the same time associated with a high degree of media freedom and autonomy from government and political institutions. This is in contrast to media systems that are either dominated by the party press or characterized by structures of press-party parallelism. [...] Media organizations in such systems obey political-ideological imperatives that are imposed by media owners who are themselves political actors or openly commit themselves to a given political line.

How great a role did the emergence of commercial competition play in media opening in Mexico? As Hallin (2000b) argues, it is difficult to untangle the forces at work, just as it is, in general, difficult to separate the effects of economic liberalisation and democratisation in the Mexican case, since the two processes overlap historically. However, Lawson (2002) contends that the role of market competition was more important than political liberalisation. He actually shows that '[w]here competition was most pronounced, as in the print media and radio, changes in the media advanced rapidly. Where competition was more constrained, as in broadcast television, opening was halting and protracted. And across all types of media, market competition explained much of the variation in coverage across regions and time' (Lawson, 2002: 178).

In this sense, changes in the Mexican media system strongly resemble recent transformations in media environments in advanced, post-industrial democracies. In Mexico, as in a number of Western European countries, the role of broadcast television changed dramatically once market competition was introduced into the sector, either as a result of privatisation or deregulation

policies (Negrine et al., 2007; Negrine, 2008). While departure points vary substantially across cases, the outcome appears to be quite similar. What once were media structures characterised by low levels of market competition, audience fragmentation, and autonomy, and which were largely subordinated to some kind of political logic, were largely replaced by media systems with a predominantly market-driven logic which entails fierce competition among media organisations for the preferences of increasingly fragmented audiences, and results in a more adversarial, powerful, and autonomous role of the media as electoral intermediaries between parties and voters.

In the Mexican case, the privatisation of the state-owned television network brought with it increasing competition for audiences between television outlets, which, in turn, forced them to adopt a market-oriented approach to news production and become much more independent and critical of the PRI-regime. This became evident in the greater presence of Mexicans' electoral pluralism in media coverage (Trejo, 2001; Lawson, 2002; Hughes, 2006) and infotainment trends, including increasing tabloidisation of the news agenda (Hallin, 1994, 2000a; Hughes, 2006) and spectacularisation of election news coverage from the late-1990s onwards (Lozano, 2001). The market-driven transformation of broadcasting newsrooms then had tremendous consequences for patterns of political competition and communication, since the new media environment was much more suitable than previously to the adoption of media-centred campaign practices, particularly to the extensive use of television during election campaigns. By the late-1990s, the media market had already become much more open, not only to opposition parties' indirect campaign communications strategies – since news media coverage was becoming fairer and balanced – but also to their direct campaign communications (i.e. political advertising).

Recent comparative studies on Western Europe have stressed the role of significant changes in national media systems in the professionalisation of political communication (Negrine et al., 2007; Negrine, 2008). For instance, in his analysis of political communication trends in Britain, Germany, Italy, and Greece, Negrine (2008) points to the role of profound transformations at the media level (particularly in the broadcast television sector), involving the emergence of less dependent media

organisations and a market-driven logic, in forcing political parties to adopt a more professionalised and media-based approach to electioneering. Similarly, this chapter contends that, alongside the electorate's detachment from the PRI, the media's dealignment from the ruling party played a key role in the transition from labour- to media-intensive campaign practices in Mexico, by levelling the media playing field and forcing all major parties (the PRI included) to seek new ways of influencing election news coverage and public opinion. Major changes included significant increases in media spending (see Chapter 6) and the employment of external expertise (e.g. media consultants, spin doctors) into the candidates' campaign staffs, as well as other media-centred campaign innovations (See Chapter 8). The Mexican experience thus lends support to the argument that one of the key factors driving the professionalisation of political communication involves the emergence of a more competitive and autonomous television environment.

Conclusion

The rise of more powerful and autonomous media

During most of the 20th century, Mexican media organisations were subservient to the PRI-led electoral authoritarian regime. However, rather than relying on the sorts of brutal and overt forms of media control, censorship, and intimidation characteristic of fully-closed autocracies, the regime relied primarily upon a number of subtler control mechanisms based on co-optation and the pervasive corruption of the media at all levels. Most print and broadcast media owners, and also most editors and reporters, were part of the regime's rent-seeking system and they greatly benefited from the politicized allocation of state subsidies, broadcasting licenses, and concessions in exchange for their political support. Hence, the PRI dominated not only the electoral but also the media arenas. The media's relationship with the political establishment substantially limited their autonomy, as well as their relevance in the electoral and campaign dynamics of the authoritarian period, even though there was a considerable degree of media access across the population. One of the most negative consequences of government control of the media was the significant electoral coverage asymmetry between the PRI and opposition candidates, which, alongside massive resource

asymmetries between the dominant party and the others, prevented the rise of media-centred campaign practices – not only by impeding both the direct and indirect mass-media appeals of the opposition parties' candidates, but also by rendering direct campaign communications of the dominant party largely unnecessary.

During the 1990s, however, the media passed from being part of the rent-seeking system of the regime and instruments for propaganda and legitimisation of single-party rule to playing a more autonomous, relevant, and powerful role as electoral intermediaries between Mexican parties and voters. This was largely a result of political and economic liberalisations, and major transformations in the political economy of news production. Economic liberalisation diminished the resources of the PRI substantially, and made media organisations less dependent on state patronage, and more susceptible to market dynamics. In the case of broadcast television, changes in the structure of media ownership resulting from privatisations were crucial to promote commercial competition, media freedom, and more balanced election news coverage. At the same time, reforms to the regime of party and campaign financing, including a new model of political media access predominantly based on paid-for political advertising, opened an important business opportunity for radio and television outlets during election campaigns (see Chapter 6).

As mentioned at the beginning of the chapter, most of the extant analyses on the professionalisation of Mexican campaigns have downplayed the role of changes in the media environment in the process of campaign change (Wallis, 2001; Langston and Benton, 2009). In contrast, this chapter argues that the emergence of a number of professional, media-centred campaign practices in Mexico has not only been driven by the rise of party competition and electoral reforms, but also by important shifts in the Mexican media system, involving the emergence of commercial competition, market-oriented news values, and press freedom. All of these transformations have shaped an important transformation in the Mexican political communication environment, from what Pfetsch (2004) has termed a *party-related* political communication culture – characterised by a small distance between political spokespersons and journalists, and the

dominance of a political party logic – to a *media-oriented* political communication culture, with a great distance between political spokespersons and journalists and the dominance of a commercial media logic.

Political parties have, in turn, responded to this new media-centred political communication environment by including outside media experts, and by developing poll-driven and media-centred campaign techniques – seeking to influence media content and public opinion (see Chapter 8). Consequently, I contend that, as in many advanced post-industrial democracies, the transformation of political communication in Mexico seems to have been the outcome of a number of interrelated factors, of which the emergence of a more autonomous and market-oriented broadcast media system was crucial.

6 Regulatory Framework of Party Financing and Campaign Professionalisation

Introduction

A number of comparative studies on election campaigns have pointed to the legal rules on party and campaign financing and access to the electronic media as important elements of campaign environments, shaping the ways in which parties and candidates run their campaigns (Bowler and Farrell, 1992a; Swanson and Mancini, 1996b; Plasser and Plasser, 2002). Most of them have tended to see party and campaign finance regulations as mere environmental filters of the transnational diffusion of modern campaign innovations (Farrell, 2005; Gibson and Römmel, 2008). Some, however, have shown that reforms to the rules of political finance can play a more active and causal role in the rise of professionalised campaigning. For example, campaign professionalisation trends in Germany not only depended on electoral changes and the availability of new communication technologies, but also to a great extent on increases in public party and campaign funding (Scarborough, 2004). Similarly, a number of studies on the Mexican case argue that reforms to the regulatory framework of public party and campaign financing played an important role in the modernisation of Mexican campaigning, alongside the rise of multiparty competition (Wallis, 2001; Langston, 2006; Langston and Benton, 2009).

According to these accounts, reforms to the *Código Federal de Instituciones y Procesos Electorales* (Federal Code of Electoral Institutions and Processes – COFIP) during the 1990s, particularly those which included major changes in the rules of party and campaign financing, fostered professionalisation by levelling the electoral playing field and providing a flexible regulatory environment that was quite suitable for capital-intensive, media-centred, and personalised campaign practices. For instance, Wallis argues that what really made campaign change possible for all parties were the reforms to party financing and media access negotiated between the leading opposition parties and the PRI government in 1996:

Thus whilst elections in the early 1990s were definitely freer than in the past, they were assuredly not fair. The PRI enjoyed massive structural advantages over its rivals, especially in terms of finance and access to the media. The 1996 reform (COFIFE) fundamentally altered the rules of the game in these arenas, and changed the way in which parties could campaign. Through large-scale increases in public financing, COFIFE made possible the more ‘Americanised’, professional, media-centred type of campaign (Wallis, 2001: 232).

This chapter focuses on the role of changes in the regulatory framework of party and campaign financing in the professionalisation of campaigns in Mexico. Particular attention is devoted to the effects of legal regulations on the structure of campaign expenditure of the three main Mexican parties, since this can tell us much about the style and type of modern Mexican campaign practices. The regulatory framework – or system – of political financing usually involves complex legal-institutional arrangements that combine a variety of regulatory instruments on the sources of income and the expenditure of political parties and candidates (including the transparency of financial activities) (Casas Zamora, 2005). It consists of ‘all legislation and pertinent legal and quasi-legal material or documents related to the funding and financial operations of political parties’ (Van Biezen, 2003a: 14). More specifically, it

includes, where applicable, constitutional provisions, laws on political parties and laws on the financing of political parties and election campaigns [...] electoral laws if and where they entail provisions related to the financing of parties, candidates, and election campaigns. It also encompasses relevant directives, rules, decrees and other regulations with legal force passed by the legislature or issued by the government or other relevant authorities, as well as codes of conduct, voluntary or otherwise, which may have a direct or indirect impact on the practice of party financing (Van Biezen, 2003a: 14).

In Mexico, the financing of parties and election campaigns is regulated by the constitution and the *Código Federal de Instituciones y Procesos Electorales* (Federal Code of Electoral Institutions and Processes – COFIFE), which also entails the regulation of political expenditure – political advertising

included – and party access to the mass media. The issue of political financing has been the subject of a number of studies. Some of them consider it a dependent variable of other political processes and institutions (Van Biezen, 2010). Here, however, I am concerned with the issue of party and campaign financing as a relevant factor influencing campaign change in countries that democratised from some kind of competitive authoritarian regime, such as Mexico.

The Legal Regulation of Party and Campaign Financing during the Authoritarian Period

Table 19 summarises the main important features of party and campaign financing regulations from 1929 to 2007. In spite of a number of electoral reforms, in the 45 years following the beginning of the authoritarian regime there was no public financing for political parties (Lujambio, 2003). It was not until 1963 that a reform to electoral law established indirect public financing for opposition parties, which consisted of minor tax exemptions for a number of their private fundraising activities. Another electoral reform, in 1973, introduced more tax exemptions, and granted parties free access to the mass media. It stated that, during election campaign periods, five minutes per week of the ‘state’s tax programming time’ should be granted to all political parties, to enable them to promote their ideological principles and programmatic manifestos.⁶⁶ The air time provided, however, was merely a façade, since parties never enjoyed real access to the media. In the end, the public subsidies provided by the law were so scarce that in the presidential election of 1976 opposition parties decided not to participate because of the massive inequalities in electoral competition.

The electoral reform of 1977 established, for the first time, a modest allowance of direct public financing. However, both the quantity and distribution of the funding were discretionally decided by the government, since the law did not establish clear rules for the allocation of state

⁶⁶ In 1968, the administration of President Luis Echeverría imposed a tax of 25 percent of their profits on all private television and radio stations. This tax was considered to be arbitrary by the country's leading broadcasters, and the following year they managed to reach an agreement with the government allowing them to pay not in cash, but in kind, through 12 percent of their broadcasting time, which could be used by the government for any purposes it considered convenient.

support. In terms of media access, the reform extended the state-provided free time to off-election periods. However, parties' access to the media remained quite limited until 1996. Following the 1977 reform, each party officially had 15 minutes per week to promote their candidates and electoral programs. But television and radio stations soon started to transmit these party broadcasts in times of low audience reach. Besides, the law left out any provision for paid political advertising, leaving media owners free to decide whether they would sell time to opposition candidates, which they systematically refused to do until 1994 (see Chapter 5).

Legislation enacted in 1987 established clearer rules for the allocation of direct public financing. It stated that half of all state-issued funds were distributed on the basis of congressional seats, and the other half according to vote shares garnered in the previous congressional election. However, the funds provided were still insufficient to level the electoral playing field. Due to the PRI's capacity to win the majority of the congressional single-member districts (see Chapter 4), and the electoral system's distorting effect on political competition, the allocation rules greatly favoured the dominant party. Greene (2007) estimates that the PRI's share of public funding was 82 percent in the 1988 presidential election. Moreover, the law did not establish any disclosure provisions, or set ceilings to private funding or levy prohibitions on government diversion of public funds for electoral use; the law thus helped to reinforce rather than undermine the cycle of limited electoral competition.

Subsequent reforms, in 1989-90, 1993, and 1994, used an allocation formula predominantly based on the parties' electoral performance, since 90 percent of the funds were distributed proportionately according to the share of the vote each party had obtained in the previous congressional election; the remainder was allocated equally to all legally registered parties. Yet, considering the substantial electoral strength of the PRI (see Chapter 4), such allocation criteria did not guarantee equitable access to public subsidies, nor fairness in politico-electoral competition (see Figure 3). This is not to say that reforms did not achieve any significant advancement. For instance, the 1993 electoral reform included, for the first time, various constraints: bans on governmental and

other campaign financing sources, restrictions on private donations, campaign expenditure limits, reporting requirements, monitoring and auditing provisions, and other important developments.⁶⁷

Regarding media access, it eliminated the discretionary power of broadcasters to sell (or not) air time to opposition parties' candidates, albeit without providing substantial direct subsidies to enable parties to purchase this air time.⁶⁸ Thus, as with previous electoral reforms, most developments were oriented towards preventing electoral fraud and increasing reliability on the vote-counting process on Election Day, rather than providing more equitability to politico-electoral competition.

The lack of fairness in electoral competition was reflected in the asymmetric distribution of public and private funds and campaign spending in the presidential election of 1994. In this contest, the PRI got 50 percent of the total public financing and 79 percent of the private funding (from the total of public and private financing combined, the PRI got 72 percent, the PAN got 14 percent and the PRD got only 3 percent) (Lujambio, 2003). The PAN and the PRD got 14 percent and 10 percent of the public funding, respectively (see Figure 12 and Figure 13). Massive asymmetries ensued, if we take into account that in 1994 private funding accounted for around 75 percent (around US\$200 million) of total political financing, versus only 25 percent of public funding (around US\$52 million) (Lujambio, 2003: 382). Even this figure is probably a considerable under-estimation of the PRI's campaign-resource advantages in that election. Although the new regulations, limits, and disclosure requirements established by the law set up more obstacles to the use of public resources for electoral purposes than pertained in the past, they were not strict enough to prevent it (for instance,

⁶⁷ Bans on financing included cash and in-kind contributions from government agencies, business enterprises, foreign entities (individuals, and public or private legal entities of foreign nationality), and even churches or sects with a religious character (Becerra et al., 2000). Private donations from individual sympathisers were limited to 1 percent of total party financing, and business contributions to 5 percent (up to 10 percent of donations could be anonymous). Parties were also required to report their total income and expenditure once a year; however, they were not required to provide specific information on how they spent such resources. Besides, the electoral authority's capacities to monitor, audit, and enforce the rules were still limited, since the IFE only audited 16 percent of the resources used in the 1994 presidential election (Lujambio, 2003).

⁶⁸ It has also been established that it was the exclusive right of parties – and their candidates – to purchase air time on radio and television in order to disseminate their political messages during election campaigns, but paid advertising or propaganda on broadcast media in favour of – or against – any political party or candidate by a third party was prohibited (Article 44).

note the existence of the president's 'secret' budget), nor to diminish substantially the role of private money.⁶⁹ Besides, there is evidence that the PRI accepted campaign contributions far above the limits established by the law, and from questionable sources (Oppenheimer, 1996).

Moreover, inequality in political competition was not only related to the scant and unequally distributed public funding, but also to the electoral expenditure limits established by the 1993 reform. According to De Swaan et al. (1998), in 1994 'the limits were so high, that they failed to serve any restraining purpose'. Becerra et al. (2000) note that the legal campaign spending limit per party in that race was 922 million pesos, an amount far beyond the public campaign funding given to all parties (201 millions) and the total reported campaign expenditures (414.7 millions). Obviously, this practically unrestricted spending gave an unfair advantage to the candidates of the dominant party, since they had privileged access to financial resources and, no matter how much they spent, they could argue that it was still legal.

Thus, at last, the predominance of private over public sources of financing – a consequence of the low enforcement of restrictions on private and government contributions, the lack of effective controls on the use of such resources for electoral purposes, and the minimum expenditure limits – rendered the direct and indirect subventions provided by the law simply insufficient to bring more equitability to political competition. This was clearly reflected in the massive campaign spending asymmetries between the PRI and the opposition parties during the 1994 election. From the total reported spending, the PRI spent 78.3 percent, the PAN 10.5 percent, the PRD 4.7 percent, and the rest of the parties only 6.5 percent (see Figure 16). In sum, party and campaign financing regulations still substantially favoured the dominant party by allowing its candidates to get resources – and spend them – far beyond the almost nil fundraising capacities of the opposition parties. In 1995, President Ernesto Zedillo would acknowledge in London that his election was free but not fair, and

⁶⁹ A secret budget inside the line item 'Branch 23' was used with great discretion by the presidency, and regarded to be part of the PRI's patronage system. The secret budget yielded an average of US\$100.9 million per year from 1983 to 1994 (Aguayo, 1997), and, according to Cornelius, it 'used to be a major source of campaign financing for state-level PRI organizations' (2004: 61).

that the levelling of the electoral field was still a major issue to be solved. Unsurprisingly, the lack of fairness in political competition, and the need for new, fairer rules for party financing and access to the mass media, were key issues in the agenda of the 1996 electoral reform.

Table 19 Party and Campaign Financing Regulations, 1929-2007

Period	Ceilings on Private Donations	Bans on Government Contributions	Direct Public Funding	Indirect Public Funding /Media Access	Allocation Formula	Limits on Expenditures Spending Limits	Reporting Requirements
1946-1962	No	No	No	None	—	No	No
1963-1973	No	No	No	Yes (Minor tax exemptions)	—	No	No
1974- 1976	No	No	No	More tax exemptions/ limited free media access (20 min. radio and TV per month) during election period	—	No	No
1977- 1986	No	No	Yes	Permanent 'equitable "free access" to the public media'	Not established in the law but discretionally decided/determined by the government	No	No
1987- 1989	No	No	Yes	15 min. radio and TV per month	50% by vote share/50% by seat share	No	No
1990- 1992	No	No	Yes		Direct: 90% by vote share/10% equally Indirect: Proportional to vote share	No	No
1993- 1995	Yes	Yes (but low enforced)	Yes		Direct: 90% by vote share/10% equally Indirect: Proportional to vote share	Yes (but extremely high)	Yes (but very low)
1996- 2007	Yes	Yes	Yes	Off-election periods: 15 min. radio and TV per month (per party) Presidential election: 250 hours in radio and 200 hours in TV paid time contingents: 10,000 20-second spots on radio and 400 on TV Mid-term election: 125 hours on radio and 100 hours on TV	70% by vote share/30% equally	Yes (but low enforced)	Yes

Source: (Molinar, 1991b; Becerra et al., 2000; Lujambio, 2003; Méndez de Hoyos, 2006) COFIPE, available at: IFE <http://www.ife.org.mx>; Political Database of the Americas <http://pda.georgetown.edu/Electoral/Mexico/codigomex.html>

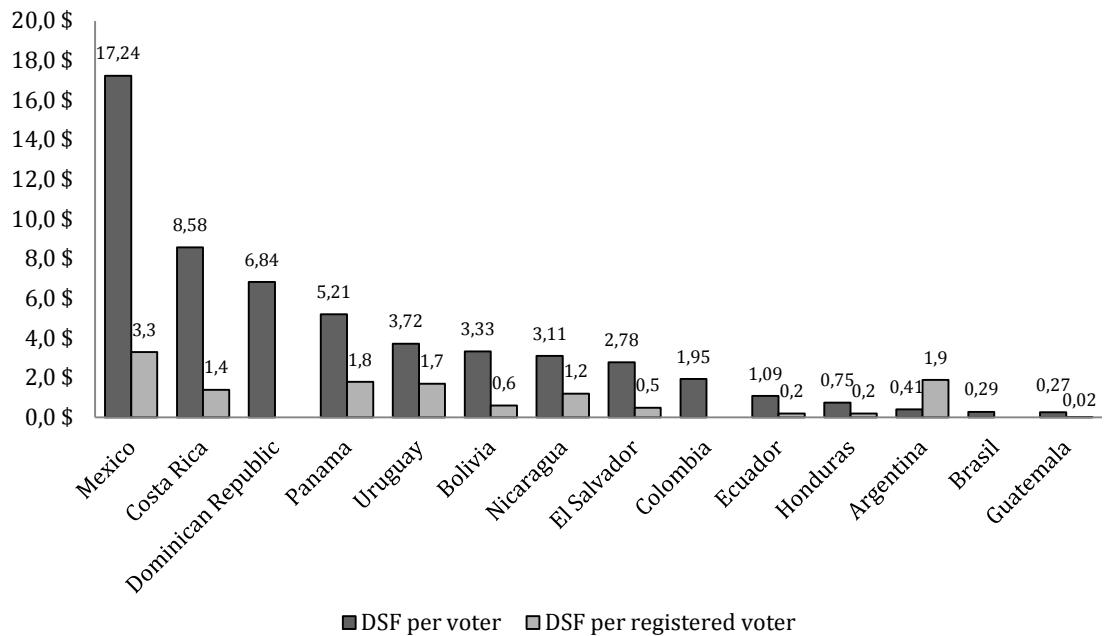
The 1996 Electoral Reform and its Impact on Politico-Electoral Competition

The 1996 electoral reform had a tremendous impact on the process of politico-electoral change in Mexico. It introduced important changes in the organisational structure of the IFE, which in turn increased its degree of autonomy. The new regulations were aimed at increasing the credibility of the electoral process and improving the management of elections, as well as establishing independent institutions for the resolution of electoral conflicts. It also increased the auditing and monitoring powers of the electoral authorities in order to support the enforcement of the law, among other significant developments. In this section, however, I focus on a number of developments in the regulatory framework of party and campaign financing introduced by the 1996 reform and their impact on electoral competition, particularly those changes that contributed to fostering the transition from labour- to capital- and media- intensive campaign practices by levelling the electoral playing field in terms of parties' access to resources and the media.

Direct public funding

Compared to previous electoral reforms, the reform of 1996 included a number of significant developments designed to create a fairer, more equitable system of political financing. First, it provided substantial increases in the amount of direct state funding, to the extent of making Mexico the most publicly subsidised country in Latin America and one of the most subsidised in the world (see Figure 10).

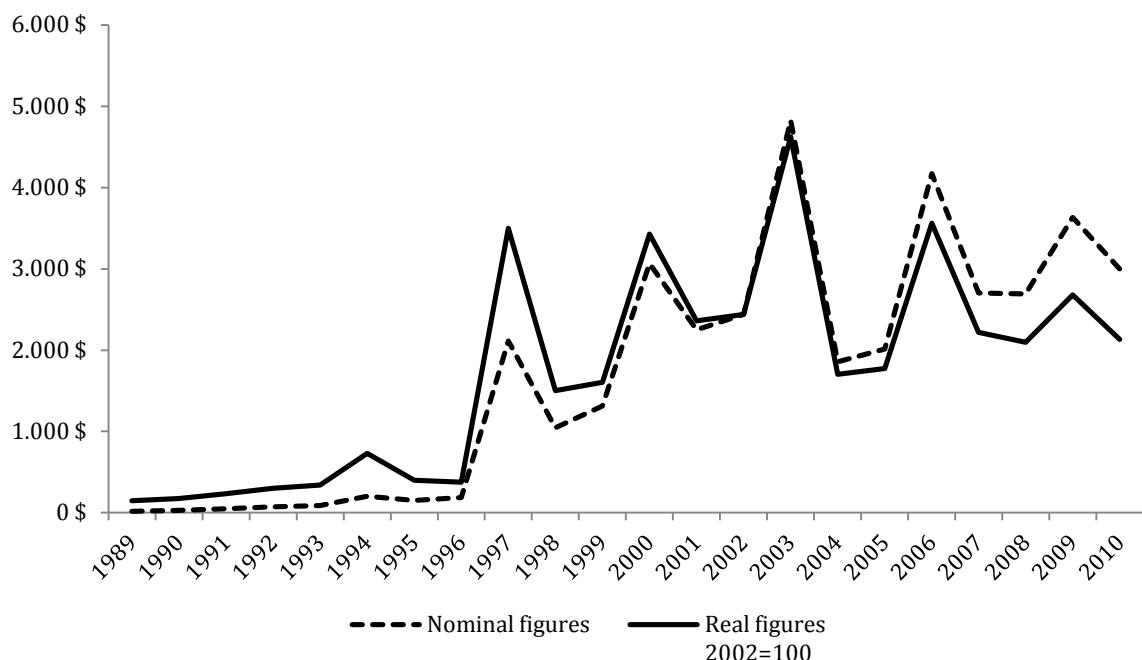
Figure 10 Direct State Funding in Latin America (US\$)



Source: DSF per registered voter: Casas Zamora (2005); DSF per voter: IFES (2009/2010): Mexico (2003), Costa Rica (2002), Dominican Republic (2002), Panama (2004), Uruguay (2004), Bolivia (2002), Nicaragua (2001), El Salvador (2003), Colombia (2002), Ecuador (2002), Honduras (2001), Argentina (2003), Brazil (2002), Guatemala (2003).

Figure 11 displays the increase in public financing in the mid-1990s compared to previous decades. It shows that the amount of public funding allocated in the mid-term elections of 1997 was ten times larger than that allocated in 1994, and five times the amount all parties reported to have spent in that election (Lujambio, 2003). It increased from 201.3 million pesos (729.5 million pesos measured in 2002 prices) to 2,111.5 million pesos (3,497.3 million pesos measured in 2002 prices).

Figure 11 Direct Public Funding, 1994-2010 (millions of Mexican pesos in 2002)*

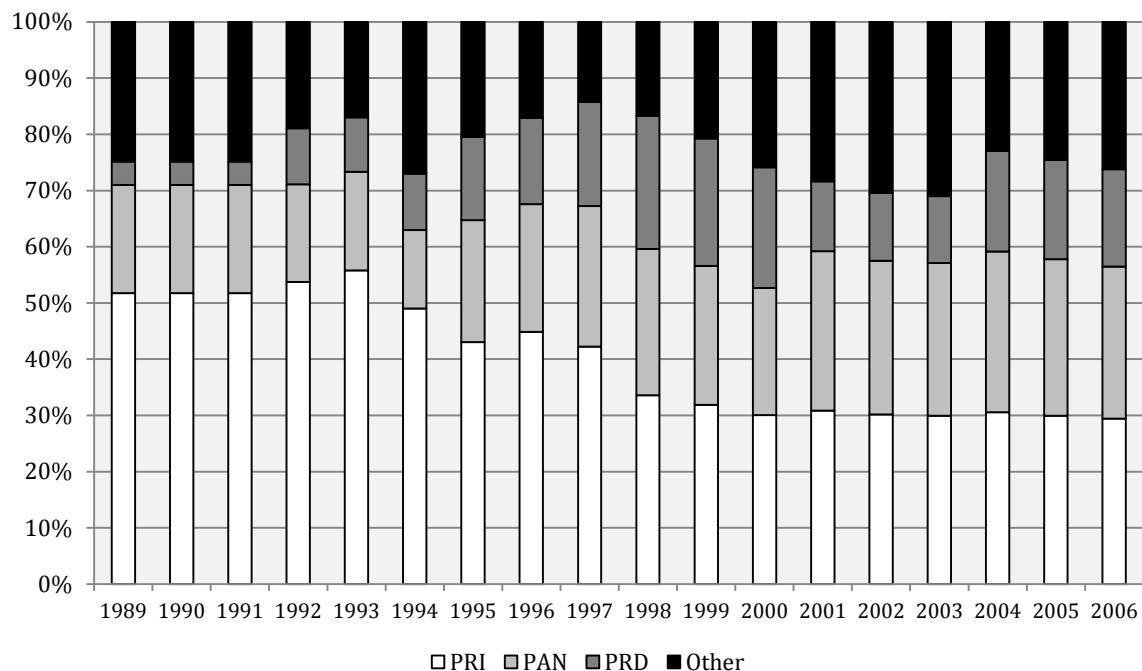


Source: 1989-1993 (Iturriaga Acevedo, 2007); 1994-2006 IFE.

* Includes ordinary and campaign public funding when applicable.

Second, the reform also established a distribution of the public subsidies that was far more equitable than in the past. The allocation formula established that 70 percent of the funding was distributed in proportion to the votes won in the previous congressional election, and 30 percent equally among all qualifying parties. Under the new rules, in the 1997 mid-term elections the PRI still took 41 percent of public funding, the PAN took 25 percent, and the PRD 19 percent (see Figure 12). Nevertheless, this was a significant improvement when compared to 1994 – when the PAN took only 14 percent and the PRD 10 percent – which was reflected in the professionalisation exhibited by opposition parties' campaign practices and communications, and the high level of competitiveness of the 1997 mid-term elections. In that race, opposition parties improved their electoral performance substantially, and the PRI lost, for the first time, its majority in congress.

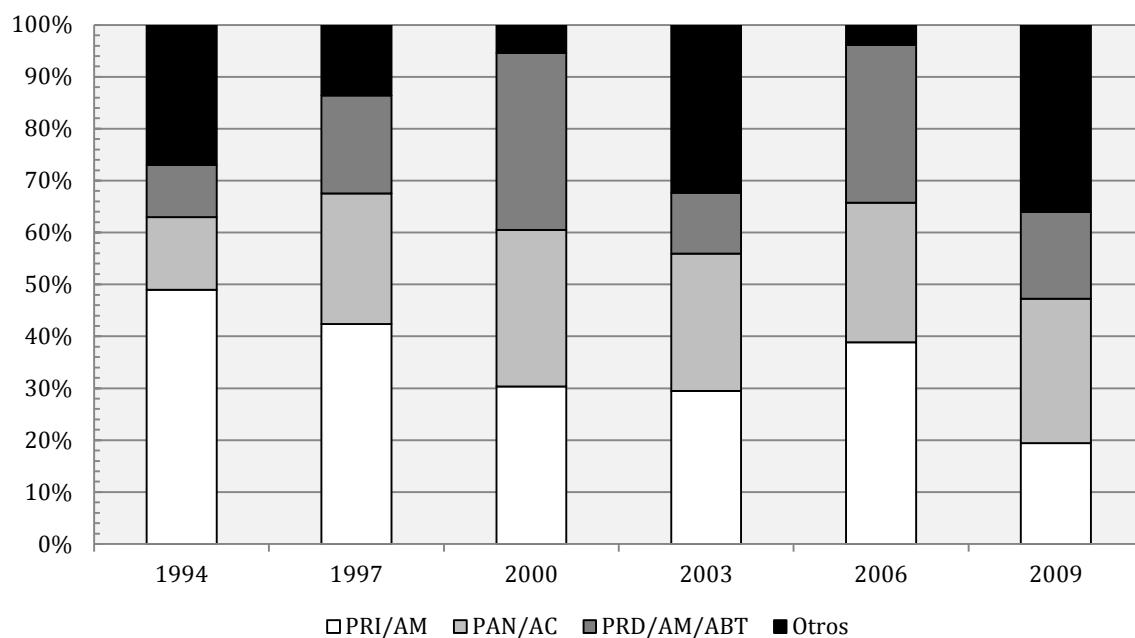
Figure 12 Direct Public Funding by Party, 1989-2006 (%)



Source: 1989-1993 (Iturriaga Acevedo, 2007); 1994-2006 IFE.

As a result, the allocation of public campaign financing in the presidential election of 2000 was even more balanced than in 1997 (the PRI took 30 percent of the total funding, the PAN took 23 percent, and the PRD 22 percent). However, due to coalition-building with other smaller parties, the PRD and the PAN got 34 and 30 percent, respectively, of the public campaign funding (see Figure 13). Thus, in terms of public financing, the PAN and the PRD started from a fairly equal base compared to the PRI (672 million pesos for the PAN, and 653 million pesos for the PRD) (Bruhn, 2004).

Figure 13 Public Campaign Financing in Mexico by Party, 1994-2009 (%)



Source: IFE.

Third, the reform set higher levels of restrictions on private financing. Private donations from individuals and moral persons were limited to 0.05 percent of the total of ordinary public funding. The law also stated that the sum of such contributions to each party could not exceed the 10 percent of total public funding given to all parties. Hence, although in 1997 the PRI's fundraising activities were still more efficient than those of the opposition – it took 59 percent of the funds, versus 27 percent by the PAN and 11 percent by the PRD – due to the new limits on private financing, and the substantial increase in state funding, the PRI got 42 percent of the total reported party financing (public and private), the PAN took 25 percent, and the PRD 18 percent (Lujambio, 2003). Similarly, in 2000, the PRI still had the biggest share of private funding: 64 percent of the funds, compared to 33 percent by the PAN, and nil share by the PRD. Nevertheless, due to the increases in electoral

competitiveness, 30 percent of the total political party funding was claimed by the PRI, 24 percent by the PAN, and 22 percent by the PRD (Lujambio, 2003).⁷⁰

Fourth, since one of the major sources of inequality in electoral competition was the PRI's substantial diverting of government funds for its partisan purposes, the reform preserved the prohibition, established in the 1993 reform, on government contributions and the electoral use of public resources other than those clearly established in the law.

Campaign expenditure limits

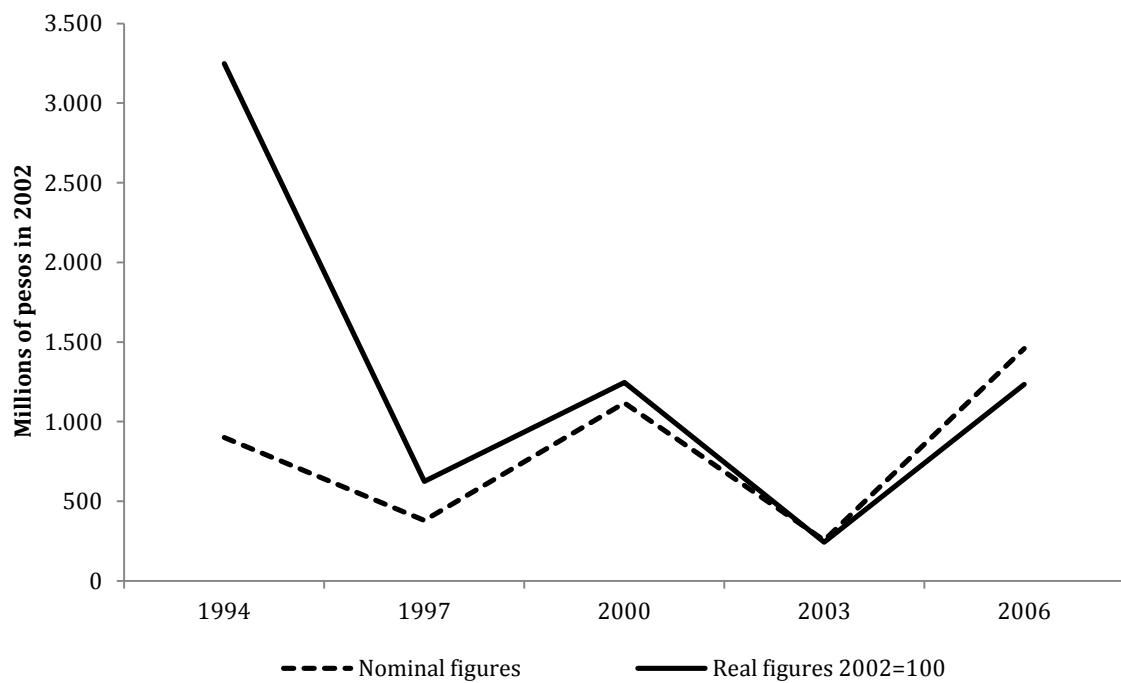
Many studies agree that among the most significant advances of the 1996 reform were not only the increased and more equally distributed state funding, but also the considerable reductions in campaign spending limits and the creation of oversight mechanisms to facilitate closer monitoring of party income and expenses (see Figure 14) (De Swaan et al., 1998; Becerra et al., 2000; Lujambio, 2003).⁷¹ The reform also imposed stricter and more comprehensive reporting requirements. Parties were obliged to submit detailed reports on their income and expenditures several times a year and, unlike in the 1993 reform, the IFE's auditing, monitoring, and sanctioning powers were extended in order to prevent violations of the law. The reform increased the extent to which party and campaign finance regulations could be enforced. The reduction of the spending ceilings was indeed a significant development of the reform, since it contributed to reducing asymmetries in campaign spending. For instance, De Swaan et al. (1998) show that the new limits helped to prevent the PRI's overspending

⁷⁰ In fact, from 1997 to 2000 the PRI's fundraising activities were far more efficient than those of the opposition, since it had 64 percent of the private financing, compared to 25 percent held by the PAN and 6.4 percent by the PRD (Iturriaga, 2007).

⁷¹ The reductions were primarily aimed at senatorial and congressional, rather than presidential, campaign spending limits, which made the presidential component of campaigns more important. In 1997, the congressional campaign spending limits had decreased by 54 percent since the 1994 reform, and the senatorial limits had decreased by 61 percent (Becerra et al., 2000). Congressional campaign spending limits then decreased from 831,470,955.00 in 1997 to 221,662,181.00 in 2000, and senatorial campaign spending limits decreased from 1,662,941,792.72 in 1997 to 404,680,384.82 in 2000 (Lujambio, 2003). However, limits on presidential campaign spending remained constant during the 1997-2006 period.

in the 1997 mid-term elections. Nevertheless, it is important to note that the expenditure limits were still comparatively very high. Of the Latin American countries that have established legal limits on electoral spending, the Mexican ceilings are the highest (US\$51.7 million), far above the Latin American average (US\$5.46 million) (Griner and Arias, 2007). Moreover, although offices within the IFE were created to monitor campaign expenditures, no hard sanctions were attached to non-compliance. Thus, in practice, the spending limits were (mostly) weakly enforced. Indeed, Demetrio Sodi, the 2006 PAN candidate for mayor of Mexico City, would acknowledge in a seminar held at Yale University in 2007 that around 70 percent of the candidates' campaign spending is not controlled by the IFE, and that 'there are lots of ways to spend money outside its regulation' (Romero and LLanos, 2009).

Figure 14 Total Campaign Spending Limit Allowed Per Party, 1994-2006 (millions of Mexican pesos in 2002)



Source: 1994, 2000 (Lujambio, 2003); 1997 (Becerra et al., 2000); 2003, 2006 (Córdova Vianello and Murayama Rendón, 2006).

Even so, after the reform, the electoral playing field was much more even with respect to previous elections. This is not to say that there were no significant resource asymmetries between the PRI and the opposition in the 1997 and the 2000 federal elections, but that the scale of dominant party resource advantages was considerably reduced, to the extent that, in spite of these remaining advantages, the PRI lost its majority in congress in 1997, and the presidency in 2000.

The regulation of private financing

The importance of private fundraising practices and parallel financing sources

A number of party and campaign financing regulations introduced in the 1996 electoral reform fostered the modernisation of Mexican campaign practices. Perhaps the most important of them was the substantially increased and more equally distributed public funding, since this enabled opposition parties to compete on a more equal footing with the dominant party. However, it would be a mistake to downplay the role of other features of the new system of political financing in the rise of Mexico's modern electioneering, such as the rules on parties' access to the media, and the role of sources of finance other than state funding. Although important, the role of the state in the financing and regulation of political parties and election campaigns in Mexico is often overestimated by analysts, whose attitude can be summed up by one commentator: that in Latin America 'very few countries have gone as far as Mexico where, by law, 90 percent of political funding should come from the state' (Posada Carbó, 2005: 17) (see also Becerra et al. 2000; Lujambio, 2003). Even though the 1996 reform established that public financing had to be greater than other financing sources, and although the reform provided more direct state funding to parties than practiced by any other country in the region (IFES, 2006, 2009), the weight of public campaign funding continues to be undermined by a number of limitations of the regulatory framework.

The 1996 reform established that public campaign funding must prevail over private financing, and retained the bans instituted in the 1993 reform on a number of financing sources other than state funding; nevertheless, it left substantial room for parallel sources of financing.⁷² Besides public subventions, these included: 1) contributions from the rank-and-file membership (and candidates for their campaigns); 2) donations, in kind or cash, from sympathisers; 3) revenues from the sales of publications, from meetings, lotteries, and other financial activities; 4) profits generated by trusts or funds from their own activities. And so, although the law included stricter ceilings for private donations from individuals, parties were allowed to receive large contributions from their members (*militants*), and add to private donations the revenues obtained from social events and public collections generated from other fundraising activities, as well as from banking investments. And in all cases, the limits of such contributions were not clearly specified by the law.⁷³

Moreover, in practice, there is no clear distinction between the resources coming from private sources and those coming from party members (including candidates' self-financing efforts). The significance of the state-provided funding vis-à-vis parallel financing sources is also undermined by the disclosure limitations of the regulatory framework. Despite the significant advances on this matter that have been achieved through continuous electoral reforms, the financing of campaign activities is still far from transparent in Mexico. Although the *COFIFE*'s reporting, monitoring, and auditing provisions are stricter than the party and campaign finance regulations of most Latin American countries, they are still quite limited compared to those of advanced democracies, where

⁷² Bans included donations from a number of sources, such as foreign entities, social or political organisations, corporations and NGOs, government contractors, and anonymous contributions (only Argentina established prohibitions against all these sources) (Zovatto G. and Freidenberg, 2007).

⁷³ The law allowed all private 'sympathisers' (moral and physical persons) of a party to donate up to 10 percent of the total ordinary public financing for all parties in that campaign period. Party militants, groups, and candidates were also allowed to donate up to 10 percent of the total ordinary public financing. However, others argue that party members and individual candidates were allowed to contribute as much as they wanted, as long as they did not exceed the party's public campaign financing (Langston, 2006).

the permissible extent of reportage, and the disclosure requirements established by the law, apply not only to parties, but also to candidates and donors.⁷⁴

It should be noted that the Mexican regime of party and campaign financing is usually regarded as one of the most advanced in Latin America, since it involves a number of publicity provisions, a detailed sanctions system, election management, and an overseeing body responsible for enforcing campaign finance regulations through substantial monitoring, investigations, and sanctioning powers (Plasser and Plasser, 2002). In the end, however, the low degree of rule of law in Mexico severely restricts – as it does in most countries of the region – the enforcement of party and campaign finance regulations, and renders parallel – and often illicit – sources of funding and fundraising efforts highly important for the financing of campaign activities, in spite of the substantial state subsidies provided (Carrillo Poblano et al., 2003; Zovatto G., 2003; Posada Carbó and Malamud, 2005; Zovatto G. and Freidenberg, 2007).⁷⁵

Therefore, rather than truly being a mixed system of political financing with a predominant component of state funding, the Mexican system is perhaps better described as one in which ‘the ‘predominance’ of public financing established by the law could be interpreted as up to 50% plus one

⁷⁴ A number of manuals and guidelines on the funding of parties and election campaigns suggest that disclosure requirements should apply to all major actors involved in political financing (IDEA, UNPD, IFES). However, Griner and Zovatto G. (2005) note that, although in the majority of Latin American countries (89 percent) electoral legislation requires parties to report their income and expenditures, only in a few cases are candidates or other actors involved in the financing of elections required to do so, which clearly undermines the transparency of political financing practices. They also argue that ‘it is not enough to record a party’s or a candidate’s income; reporting should also include details of all expenditures to allow one to assess the relationship between income and expenditures, and thus gauge the degree of transparency in the management of accounts’ (Griner and Zovatto G., 2005: 37). For instance, in Mexico, at least until 2006, there were no provisions for the disclosure of candidates’ incomes and/or expenditures. Langston (2006) notes that in congressional campaigns in which parties reported their campaign expenditures to the IFE, they were allowed to distribute the total spending in the districts as they saw fit; thus, it is not possible to know how much the candidate in a given district spends versus what the party spends at the national level, since both totals are prorated and then disaggregated at the district level (Langston, 2006).

⁷⁵ This holds true for candidacies for executive and legislative posts as well. However, whilst it is easier for candidates for executive posts to raise money in order to finance their campaigns, federal and local congressional candidates are more heavily dependent on public funds and (mostly) on their own resources in order to finance their campaigns. Interviews with former local and federal congressional candidates also suggest a substantial degree of cross-party variation in relation to the specific weight of public funding.

peso of public funding and the rest of private financing' (Zovatto G., 2003: 54) (see also Langston, 2006). The importance of financing sources other than state funding became evident after the 2000 presidential election, when investigations carried out by the electoral authority revealed major political financing scandals involving the PRI's and the PAN's presidential campaigns (the *Pemexgate* and the *Amigos de Fox* scandals).⁷⁶ In the case of the PRI, the IFE's investigation discovered that the party violated electoral law by accepting 500 million pesos (US\$147.2 million dollars) from the state-owned oil company *Petroleos Mexicanos* (PEMEX), which were not reported to the electoral authority. It also demonstrated that the public funds were illegally transferred to Francisco Labastida's campaign (the PRI's presidential candidate) by the director and other top executives of the company through the workers' union of PEMEX.⁷⁷

The investigation also revealed that the campaign of the PAN's presidential candidate, Vicente Fox, violated the legal ceilings on contributions and expenditures, and accepted donations (91,227,572 million pesos) from a number of banned sources, such as private business enterprises, foreign donors, the PAN's parliamentary group of the senate of the republic, and some contributions made anonymously (for a comprehensive account of the investigations on both political scandals see Córdova Vianello and Murayama Rendón, 2006).⁷⁸

Besides the limitations restricting the reporting, monitoring, and auditing provisions of the regulatory framework, the *Pemexgate* and *Amigos de Fox* political financing scandals demonstrated the high importance of private fundraising activities in supporting political competition in the newly competitive electoral market. In the case of the PAN's presidential campaign of 2000, parallel sources

⁷⁶ *Amigos de Fox* (Friends of Fox) was the name of the parallel campaign organisation (similar to a political action committee in the US) created to raise money and recruit campaign activists to support Vicente Fox's presidential campaign.

⁷⁷ Besides, that contribution exceeded the legal limit by 50 million pesos. In this case, the electoral authority punished the PRI with the largest fine imposed on a political party anywhere in the world (a fine of 1000 million pesos, twice the money illegally received) (Cordova and Murayama, 2006).

⁷⁸ Of the contributions made by 291 *natural and moral persons*, 13 were made above the legally established limit, and the PAN violated the campaign spending limits by 18.3 million pesos (Cordova and Murayama, 2006).

of financing and fundraising efforts proved to be very important in order to win the presidential election. A number of analysts and commentators agree that without the campaign resources provided by *Amigos de Fox*, it would have been very difficult – if not impossible – to challenge the PRI's electoral dominance. And the opportunity to supplement public with private funds was also crucial in supporting the transition from labour- and people-intensive to capital- and media-intensive campaign practices in Mexico.

Indirect public subsidies

Regulation of party access to the mass media and political advertising

The transition from traditional *people-* and *labour-intensive* to modern *capital-* and *media-intensive* campaign practices in a given country is determined to a large extent by the degree of mass-media penetration, the patterns of media use, the regulation of parties' media access and political advertising, and the limits on campaign spending. Campaign modernisation trends have been more pronounced in countries with high levels of media penetration (and consumption), but also where parties have substantial resources and there are few or no limits on campaign spending and advertising (Gibson and Römmele, 2001; Wlezien, 2010).

The electoral reform of 1996 not only granted large quantities of public (and private) money to opposition parties, but also made significant advances in the rules of party access to broadcasting, since it provided parties with substantial free access to the broadcast media.⁷⁹ More importantly, it gave them the option – and the financial means – to buy additional air time in the private media for

⁷⁹ According to the COFIPÉ (Article 47), during off-campaign periods each party had 15 free minutes per month to promote its candidates and programs. In presidential election campaigns, the law provided a total amount of free advertising air time for all parties of 250 hours on radio and 200 on television. In addition, the IFE purchased up to 400 twenty second spots (100 hours) on TV and up to 10,000 spots (125 hours) on radio per month, distributing them using the same formula as for the allocation of direct funding (30 percent of them, in equal shares, among all registered parties, and 70 percent proportionately to each party share of votes). In mid-term federal elections, when only the lower Chamber of Congress (Chamber of Deputies) was renewed, 50 percent of the time was allocated to parties (100 free hours on television and 125 on radio stations). The law neither sanctioned nor regulated private time for the mid-term election.

political advertising. In this sense, some scholars considered that, in contrast to the prevailing weak regulatory practices in the region (Griner and Arias, 2007),⁸⁰ the 1996 electoral reform introduced regulations governing party access to the broadcast media comparable to those Latin American countries with strict regulatory frameworks, like Brazil or Chile, where neither parties nor individual candidates are allowed to purchase advertising on television; instead, parties receive slots of free state-sponsored air time that are broadcasted simultaneously on all television channels on a daily basis during the election period (Plasser and Plasser, 2002).⁸¹

However, like the majority of Latin American democracies, the Mexican regulatory framework ushered in by the 1996 reform combined limited free air time on public and state-run media, and practically unlimited access to paid political advertising on private media outlets (which is far more prominent, by and large not closely regulated, and harder to control) (Griner and Arias, 2007; Zovatto G. and Freidenberg, 2007). The reform did not set specific restrictions to paid advertising in the mass media, but it was limited through the general ceiling on electoral expenditures. Therefore, since campaign spending limits were high and weakly enforced, political advertising prevailed over free broadcast time. Restrictions on the content of advertising were also very low. In the end, the increases in state subventions, and the weak restrictions on private financing, campaign, and advertising spending introduced by the 1996 reform, interacted with

⁸⁰ Griner and Arias (2007) note that most Latin American countries impose legal limits on paid political advertising in the media, either directly through bans or specific ceilings to paid media advertising, or indirectly through global campaign spending limits. However, such limits are often ignored by parties and candidates (Griner and Arias, 2007).

⁸¹ In both countries, paid political advertising in broadcast television is prohibited by law; however, in Chile, air time can be purchased from radio stations and cable television. Political broadcasts are usually between two and ten minutes long, depending on the number of competing candidates and, in the case of Brazil, on the size of each candidate's congressional delegation (see also, da Rocha Neto, 2007; Boas, 2010). Griner and Arias (2007) note that in Brazil and Chile, the substantial amounts of free state-sponsored broadcast time available in the private and public media has not replaced but complemented electoral spending. Since parties have been relieved from media spending, their resources have been redirected to cover the costs of professionalisation (opinion polls, other advertising, and the production of spots costs). In the case of Brazil, it is estimated that the costs linked to the production of political advertising in the broadcast media consume around 30 percent of electoral spending in presidential elections (around US\$34 million).

television-centric patterns of media use (high TV consumption) (see Chapter 5) in order to render Mexican campaigns highly media-oriented.

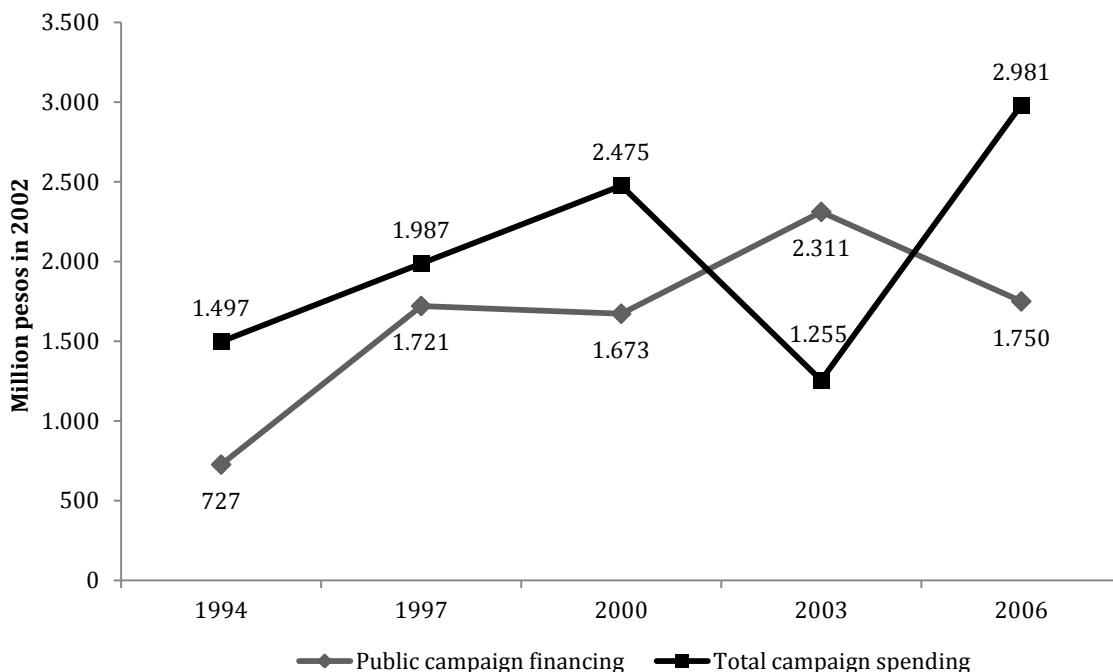
Changes in Campaign Spending

Campaign spending and the increasing cost of modern electioneering

Estimating the real cost of Mexican elections is not an easy but an uncertain task. Here, I rely on official reported data on parties' income and expenditures submitted to the electoral authority. However, although official data provide some useful insights on the electoral expenditures of parties, they also have some important shortcomings. As shown by a number of investigations on political financing scandals, parties tend to under-report the real amount of money they receive, as well as fail to disclose some of their financing sources (Córdova Vianello and Murayama Rendón, 2006). Violations of the spending limits are also quite frequent.

However, the official data reveal many important trends. First, they indicate that the electoral reform of 1996 had a significant impact on the levels, distribution, and structure of campaign expenditure during the 1997-2006 cycle. Figure 15 shows a substantial increase in electoral spending during the period, particularly in the presidential elections of 2000 and 2006. According to the data, campaign spending in presidential races rose gradually from 1500 million pesos in 1994 to 3000 million pesos in 2006 (measured in 2002 prices). Most of this growing trend is due to increases in broadcast-media spending (particularly on television), since disbursements in other kind of advertising, as well as operational campaign expenses, remained constant during the period. In mid-term elections, however, the tendency has been towards a decrease in electoral spending. This sounds logical if we take into account that in 1994, 2000, and 2006 the president was elected as well as the totality of Congress (the senate and the chamber of deputies), whereas in 1997 and 2003 only the lower house of Congress was renewed.

Figure 15 Public Campaign Financing and Total Campaign Spending in Mexico, 1994-2006 (millions of Mexican pesos in 2002)

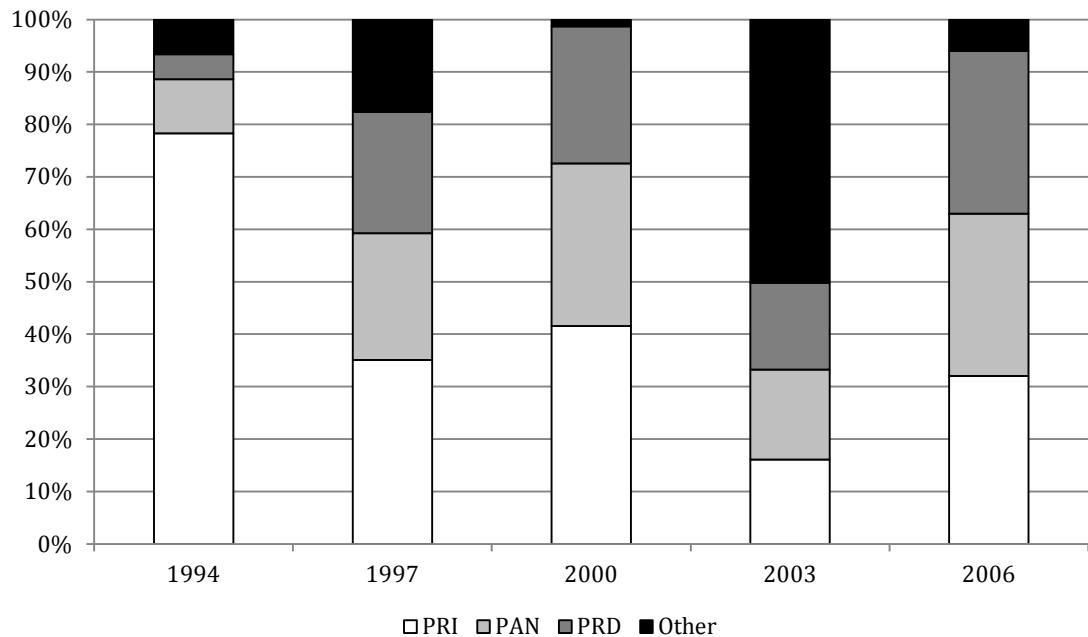


Source: IFE.

*In the mid-term congressional election of 2003, public campaign financing was higher than the legal campaign spending ceiling established by the electoral authority. Hence, parties were not allowed to spend the totality of the public campaign financing.

The effects of the 1996 electoral reform were also reflected in the distribution of campaign spending during the 1997-2006 period. In contrast to the 1994 presidential election, when the PRI's campaign disbursement amounted to 70 percent of the total electoral expenditures, in 1997 it was reduced to 36 percent of the total electoral outlay. Figure 16 shows that whilst electoral spending by the PAN and the PRD increased substantially throughout the four election campaigns between 1997 and 2006, the proportion of the PRI's electoral expenditures remained consistently around one third of the total outlay.

Figure 16 Campaign Spending in Mexico by Party, 1994-2006 (%)



Source: IFE.

Another important trend to emerge from parties' self-reported spending data is the relative weight of direct state subsidies as a proportion of the total electoral expenditures. In 1994, parties' subsidy-dependence in national campaigns stood at 726.6 million pesos, approximately half of total campaign spending, but after the 1996 reform it climbed sharply, to 86 percent, in 1997. However, it fell to 67 percent in 2000 and 58 percent in 2006. This indicates that parties and candidates financed the increasing cost of professionalised, media-centred election campaigns not only with public funds, but also with substantial contributions from parallel financing sources. The weight of public funding seems to have been more important in mid-term congressional elections (1997 and 2003) than in presidential races.

Nevertheless, interviews with a number of former congressional candidates of the three main parties suggest that their campaigns were more dependent on public campaign financing than those of executive (gubernatorial and municipal) candidates (Núñez Armas, 2009). Nevertheless,

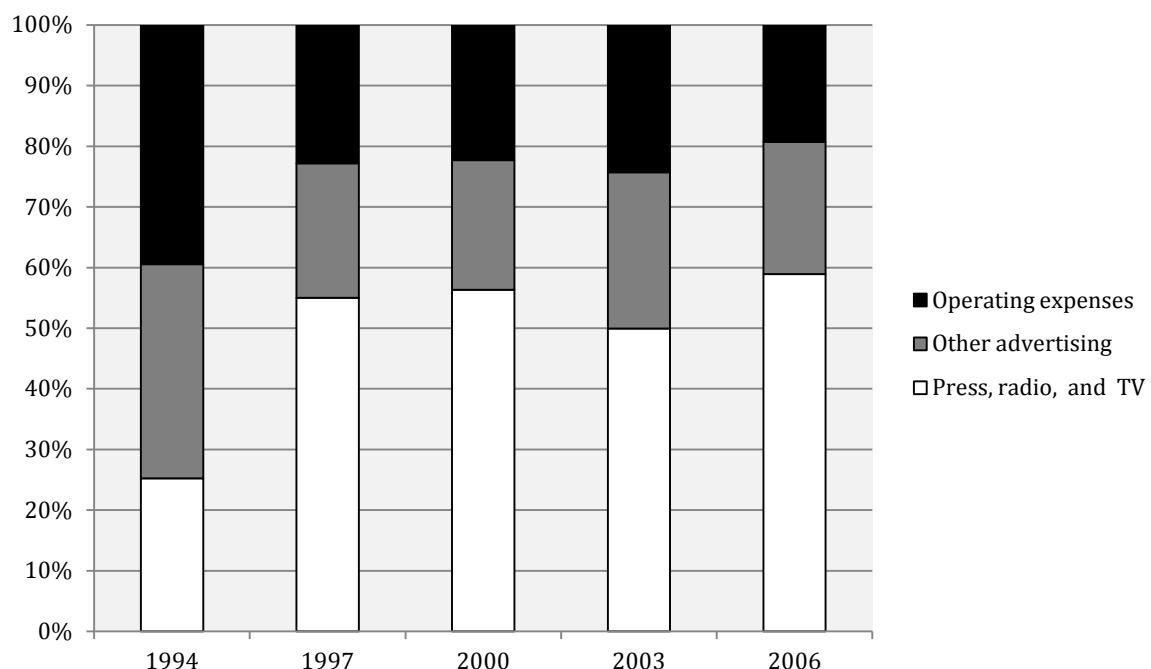
candidates also stress that, although useful, public funds were more often than not simply insufficient to finance the growing cost of election campaigns, and that campaign expenditures usually grew far above the amount of public funding and the official spending limits (Estefan Martínez, 2009; Llerenas Morales, 2009; Leyva Hernández, 2010; Serrano Jiménez, 2010; Velasco Lino, 2010).

Thus, even if one argues that private funding plays an additive role vis-à-vis public campaign funding, one also has to acknowledge that, except for in the 2003 mid-term election, the resources coming from financing sources other than state funding were a considerable portion of the total electoral outlays during the 1994-2006 period, especially in presidential elections (see Figure 15) (see, for a comparative analysis on the relative weight of direct state funding in Uruguay and Costa Rica, Casas Zamora, 2005). This suggests that, rather than parallel financing sources playing an additive role vis-à-vis public funding, as argued by some authors (Giménez Cacho, 2003; Lujambio, 2003), the opposite appears to be true: the latter is additive to the former. It could thus be argued that direct state subsidies substantially diminished, but did not eliminate, the role of resources coming from private, governmental, and alternative financing sources.

The structure of expenditure

How is the money spent in Mexican campaigns? Figure 17 shows the breakdown of campaign spending from 1994-2006 in Mexico. The effects of the 1996 electoral reform on the structure of campaign expenditure were evident in the mid-term congressional election of 1997. Whereas in the presidential election of 1994 media spending amounted to only 25 percent of the total electoral expenditure, in 1997 it amounted to 55 percent of the total outlays. Besides, due to the massive resource asymmetries between the PRI and the rest of the parties in 1994, most media spending was done by the dominant party, which spent 81 percent of the 103.7 million pesos devoted to paid political advertising on the mass media in that election.

Figure 17 Campaign Spending per Items, 1994-2006 (%)



Sources: IFE.

Thus, despite the existence of free, state-provided air time in the media, from 1997 to 2006 paid media appeals consumed most of the parties' campaign budgets, averaging 55 percent of the total electoral spending during the period. The reason is quite simple: most of the free air time provided by the law was on state-run, public media, with very limited audience share compared to private media outlets (see Chapter 5). In contrast, expenses on other types of – more traditional – political advertising diminished from 35 percent of total campaign spending in 1994 to an average of 23 percent from 1997-2006.⁸² Campaign operating expenses followed a similar trend. While in 1994

⁸² Propaganda expenses involve campaign advertising other than paid media (newspapers, radio, television), such as painted walls (*bardas*) and blankets (*mantas*), flyers, posters, billboards, sound equipment, rented places for campaign events (mass meetings, rallies), campaign merchandise, promotional materials and similar expenses, and, more recently, spots in cinema theatres and on the Internet.

they amounted to 40 percent of the total electoral spending, from 1997-2006 they decreased to around one fifth of the total outlays (an average of 22 percent).⁸³

A number of Latin American countries provide direct public funding only for the financing of campaign activities, rather than for parties' operational expenses (Zovatto and Freidenberg, 2007). Some others allocate funding for both party organisation and election expenditures, but only during election periods. In other cases, the subsidy provided between elections is quite scarce. Comparative studies on political finance in other Latin American countries show that such financing schemes may have a significant effect on the structures of electoral expenditure by producing a strong need to recreate national and local party organisations before election-campaign periods. This is because parties often lack sufficient resources to maintain regular party structures during off-election periods.

For instance, Casas Zamora's (2005) comparative analysis on party and campaign financing in Costa Rica and Uruguay shows that, contrary to widespread assumptions about excessive television advertising in Costa Rican and Uruguayan election campaigns, and despite extensive penetration of television in both countries, such excesses only emerge in the latter case. In Costa Rican election campaigns, in contrast, the largest share of electoral expenditures goes to the recreation of party structures (personnel salaries, payroll costs, professional fees, and the installation and operation of party branches and campaign headquarters), and to cover a number of organisational, transport, financial, and operating costs, rather than to paid political advertising. Thus, '[i]f Costa Rican national campaigns have any "spending trigger" at all it is hardly the excess of television advertising, but the *lack of permanent party structures'* (Casas Zamora, 2005: 117).

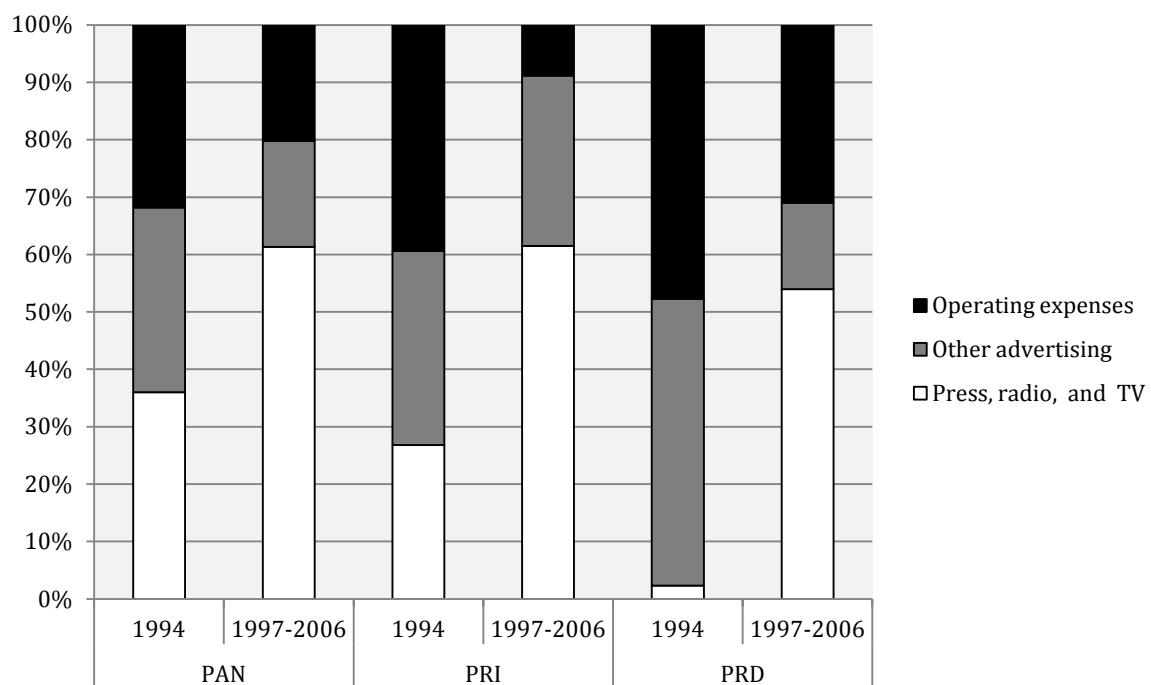
⁸³Campaign operating expenses involve salaries and wages of personnel and provisional staff, professional fees, temporary leasing of movable and immovable property, installation and operation of party branches and campaign headquarters, transportation, and other related expenses.

That is not the case in Mexico, in part because of the substantial state subsidies that parties receive not only during elections, but also between election periods. The electoral law provides substantial direct public financing in election and off-election periods to cover parties' operational expenses (*ordinary funding*), which is used for general party administration, education, training, research, and publishing. During election years, parties also receive an amount equal to the ordinary funding for campaign expenses. The availability of public funds in off-election periods keeps a number of regular party structures active, relieving individual candidates of the PRI, the PAN and, to a lesser extent, the PRD of the need to devote a considerable part of their resources to recreate these structures before elections.⁸⁴ Hence, from 1996-2007 parties and individual candidates were able to funnel most of their resources into paid advertising in the broadcast media. In the case of the smaller parties, their organisational weaknesses (which result in a limited electoral mobilisation capacity) make them even more dependent on political advertising in the media for campaigning. However, regardless of the main parties' organisational strength, electoral spending trends do not vary significantly between them and the other parties.

Figure 18 displays the relevant contrasts in electoral spending of the PAN, the PRI, and the PRD between the 1994 election and the 1997-2006 period. The data show the effects of the 1996 electoral reform on the electoral disbursements of the three main parties. Whereas in 1994 parties devoted the largest share of their legally registered expenditures to campaign operating expenses and other advertising items, from 1997 to 2006 they diverted most of their campaign resources into paid, mass-media advertising (mostly TV advertising).

⁸⁴ The high rent-seeking propensity of the system of Mexican financing (the highest in the region) significantly reduces the lack of regular party structures. It should be noted, however, that despite the substantial state funding, there is still a considerable degree of cross-regional and cross-party variation in terms of the presence (or absence) of permanent party organisations in Mexico. However, studies on congressional campaigns have stressed that PRI congressional candidates needed to reconstruct party structures before election periods prior to the advent of substantial public campaign funding in 1996 (Langston, 2006).

Figure 18 Campaign Spending per Items by Main Mexican Parties, 1994 and 1997-2006 (%)



Sources: IFE.

According to the official data, the leading parties' media spending increased dramatically during the period, from 378 million pesos in 1994, to 1093 million in 1997, and to 1756 million in 2006. This growth was particularly marked in presidential elections, in which total media outlays increased from 1314 million pesos in 2000 to 1756 million six years later. The PRI devoted more money to media advertising in all elections; nevertheless, media spending levels have gradually tended to equalise, and in 2003 and 2006 the three parties reported that they spent similar amounts in media advertising (see Figure 19).

Figure 19 Media Spending by Parties, 1994-2006 (millions of Mexican pesos in 2002)

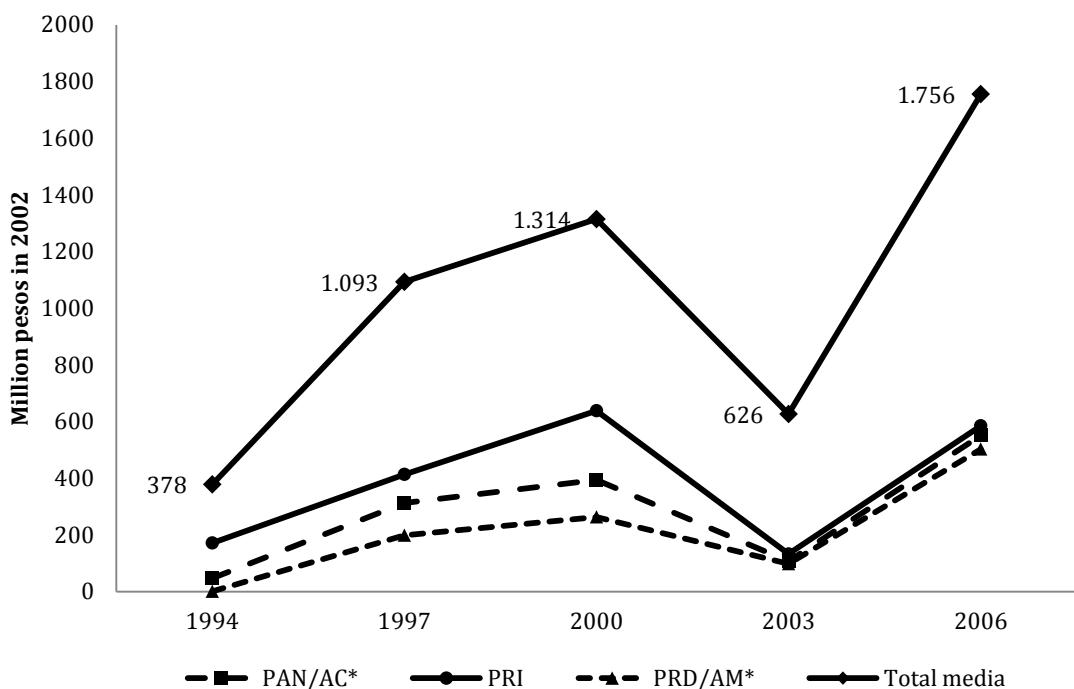
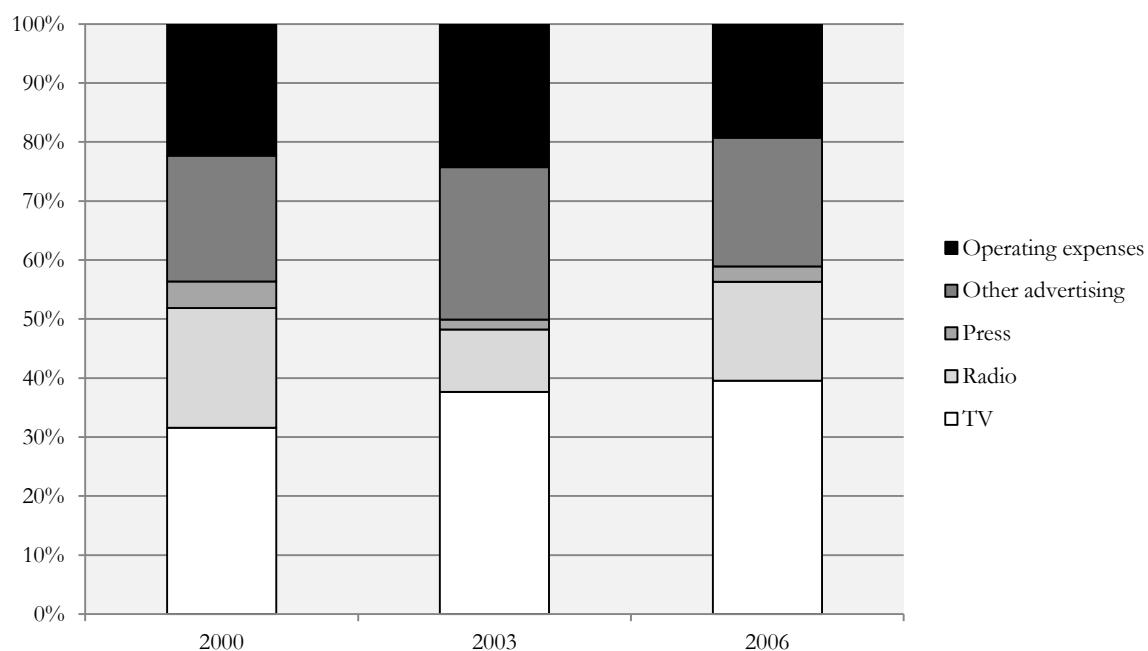


Figure 20 displays campaign expenditure per item, including the breakdown of media spending from 2000 to 2006.⁸⁵ Although television advertising coexisted with similarly heavy disbursements on other forms of political advertising, it consumed the single largest proportion of electoral outlays in Mexican elections during the period. For instance, of the 2,226 million pesos that comprised all parties' and candidates' self-reported campaign spending in the 2000 presidential election, 54 percent (around 1.2 billion pesos, or US\$130 million) was devoted to paid political advertising in the media (Cordova and Murayama, 2006). From that amount, 56 percent was spent on television ads (330), 36 percent on radio, and only eight percent on print media (Beltrán, 2007). In fact, the share of

⁸⁵ Until the election of 2003, parties were not required to provide a breakdown of their campaign expenditures in the mass media by the electoral authority. Other, non-official sources and secondary accounts provide disaggregated information on media spending in the 2000 election (Córdova Vianello and Murayama Rendón, 2006; Beltrán, 2007). Thus, unfortunately, it is not possible to know how much money was spent on television advertising by parties before 2000.

TV advertising as a proportion of the total campaign spending increased from 32 percent in 2000 to 40 percent in 2006.

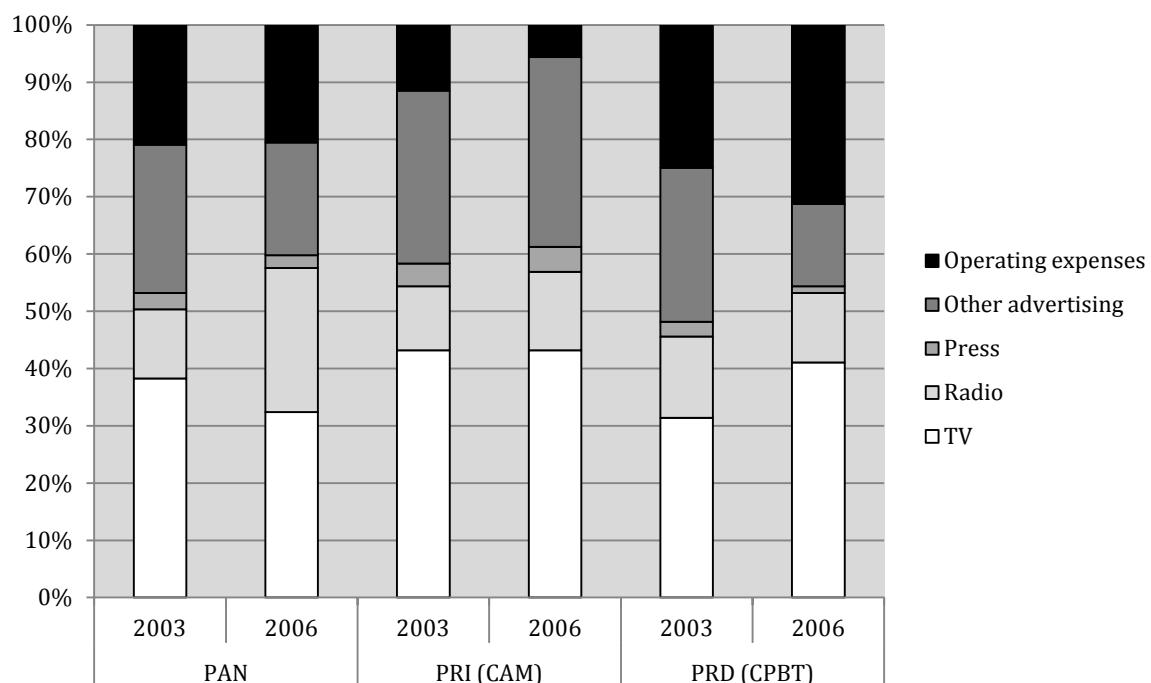
Figure 20 Campaign Spending per Items, 2000-2006 (%)



Sources: 2000, Cordova and Murayama (2006); Beltrán, (2007); 2003-2006, IFE.

During the professional era of electioneering, TV outlays do not seem to have varied substantially across the three main Mexican parties, nor did they between the mid-term congressional and presidential elections. Figure 21 reports the breakdown of campaign spending per item during the 2003 mid-term congressional election and the 2006 presidential election by the PRI, the PAN, and the PRD. Although parties spent much more money in the 2006 election – since it included presidential, congressional, and senatorial elections – media spending as a proportion of the total campaign expenditures did not vary substantially between both types of elections. Thus, in the Mexican case the ‘electoral spending trigger’ of campaigns is not the lack of regular party structures, but the excess of radio and television advertising.

Figure 21 Campaign Spending per Items by Main Mexican Parties, 2003-2006 (%)



Sources: IFE.

The 1997 mid-term congressional and the 2000 presidential elections were the beginning of what could be regarded as the modern era of campaigning. This period is not only characterised by more capital-intensive campaign practices – based on the extensive use of spots, mass-media appeals, surveys, consultants, and political marketing techniques – but also by more candidate-centred campaign practices. Although both individualisation and capital-intensive trends were the result of the interaction between a number of changing conditions in the party (see Chapter 4) and media (see Chapter 5) systems, the trigger-factor fostering campaign innovation was the regulatory framework resulting from the electoral reform of 1996. The new regulatory framework made it possible for opposition parties to appeal to the increasingly dealigned electorate coming from the PRI by means of modern, poll-driven and media-intensive campaign tactics and strategies. The systematic use of paid political advertising, sophisticated polling methods, the hiring of external campaign experts among other expensive, professional campaign innovations would not have been possible without

large-scale electoral reforms that provided generous public campaign funding for all parties, and the possibility of supplementing it with substantial private funds.

Conclusion

During the 45 years following the end of the Mexican Revolution, parties did not benefit at all from any kind of direct or indirect public funding. State funding was introduced in 1979 but, despite continuous electoral reforms introduced during the 1980s and the first half of the 1990s, the support provided by the state was scarce and unequally distributed. It was not until the electoral reform of 1996 that major legislation regulating party and campaign financing was introduced, levelling the electoral playing field. The dramatic resource asymmetries (as a result of the systematic use of government resources for electoral purposes) that separated the PRI from the opposition parties were gradually reduced by the introduction of neoliberal economic reforms, particularly by the privatisation of public enterprises (Greene, 2007), but also by important developments introduced by the electoral reform of 1996. A summary of major changes in the regulatory framework is provided below.

- **Substantial increases in direct/indirect public campaign funding, and a fairer allocation formula for public subsidies.** From 1996 onwards, substantial direct and indirect state subsidies were made available to all political parties. The new system of political financing made a significant contribution to fairer electoral competition by providing opposition parties and their candidates substantial resources, both financial and in terms of media access, allowing them to run more effective and professionalised campaigns, and so improve their electoral performance and challenge the PRI's electoral dominance. The availability of substantial direct public funding during election and off-election periods also diminished the need for financial resources in order to recreate national and local party organisations before elections, which is quite common in other cases in the region. So, thanks to the generous state subsidies (the highest of the region), parties and

individual candidates were able to spend the largest share of their resources on paid media appeals instead on the recreation of regular party structures.

- **Practically unlimited access to (and low restrictions on the content of) paid political advertising.** The new regulatory framework provided parties free air time on public and state-owned media, and almost unrestricted access to paid political advertising on private media outlets. It also set minimum restrictions on the content of campaign communications. Private access to the media prevailed over free, state-sponsored air time largely because of the limited audience share of public media (see also Chapter 5).
- **Significant room for parallel sources of financing and weak campaign spending limits.** Although the degree of enforcement of Mexican party and campaign finance regulations may seem higher than in other Latin American countries, the strictness of the regulatory framework has been overestimated in a number of studies on the evolution of party and campaign finance regulations. In fact, the lack of reliable information on the real amount of campaign contributions and spending makes it very difficult to assess the real influence of private money in politics, which is still pervasive and often pernicious. Indeed, the reform of 1996 included more effective restrictions on private and governmental contributions, campaign spending limits, and stricter reporting requirements. However, it also provided substantial room for parallel financing sources and, despite the legal ceiling on electoral expenditures, there is a general trend towards campaign overspending. Therefore, it could be argued that public funding has not replaced, but supplemented the need for campaign resources from private sources. The limitations of the reporting and auditing provisions of the regulatory framework, as well as the uncertain enforcement of a number of campaign regulations, undermine the ‘predominance’ of the public subsidies established by law, rendering fundraising efforts and parallel sources of funding highly important for the financing of presidential and

congressional campaigns, as in many other Latin American countries with direct state financing. However, while fundraising is easier for executive candidates, congressional candidates often have to resort to self-funding.

Changes in the regulatory framework were reflected in the levels and structure of campaign spending, which increased and became considerably more media-oriented than previously. From 1997-2006 all parties directed most of their campaign budgets into paid political advertising, particularly on TV advertising (Zovatto G., 2003: 85). Changes in the levels and structure of electoral expenditure during the 1990s thus reflect one important feature of the professionalisation of Mexican electioneering: the transition from *labour-* to *capital-intensive* and *media-centred* campaign practices.

7 Trends of Continuity and Change in Mexican Presidential Campaigns I: Campaign Organisation and Research

Introduction

Following David Farrell (1996), I regard election campaigns as a set of efforts carried out by campaign organisations (political parties and candidates) to win votes. These campaign efforts include a complex set of strategies, tactics, techniques, and activities – both financial and communicative – designed and planned to persuade and mobilise the electorate. This chapter and the following one look at campaign professionalisation trends in Mexican presidential elections relating to campaign organisation and research, and communication that have taken place over the last two decades. Nowadays, Mexican presidential campaigns exhibit a considerable degree of professionalisation and personalisation, but this was not always so. For most of the last century, Mexican presidential candidates ran essentially traditional, low-budget, labour-intensive, and locally oriented campaigns, based on direct, face-to-face contact between candidates and voters.⁸⁶

Until 1994, the dominant party's presidential campaigns had two basic components: a whistle-stop tour of the federal states, and a series of meetings and public lectures organised by the party's *Instituto de Estudios Políticos, Económicos y Sociales* (Institute for Political, Economic, and

⁸⁶ Traditional labour-intensive campaign practices are characterised by face-to-face contact between candidates and voters at the local level, such as public meetings, campaign rallies, door-to-door canvassing, etc., as well as by the amateurism of the staff due to the use of party volunteers and workers for electoral mobilisation efforts and as sources of voter feedback. On the contrary, professionalised, capital-intensive campaigns are characterised by their high cost, due to the intensive use of the mass media (mainly television), new technologies for political advertising, and hired professionals (political consultants, pollsters, and advertising agencies) who carry out important campaign functions and efforts previously undertaken by party workers and volunteers. It should be noted that, although the PRI campaigns were characterised by their low-cost, it does not mean that they were cheap. Actually, campaigns were part of a broader, clientelist electoral mobilisation strategy which involved the selective distribution of substantial public goods to those specific sectors of the population that made up the PRI's base of electoral support. Rather, I mean that, compared with the present stage, they were considerably cheaper.

Social Studies – IEPES) (Lomnitz et al., 2010).⁸⁷ Most of the PRI presidential candidates' campaign efforts consisted of visiting a large number of cities, towns, ranches, and even tiny villages across the country in order to deliver stump speeches and hold mass rallies with leaders, representatives, and members of the peasant, labour, and popular sectors of the party, as well as smaller 'meet-and-greet' events with local and representative groups, political bosses and notables, and entrepreneurs. General Lázaro Cárdenas, the presidential candidate of the PRM (one of the two predecessors of the PRI), carried out the first massive whistle-stop tour around the country in Mexican history during the second half of 1933 and into 1934.⁸⁸ Presidential campaign communications were initially limited to keynote speeches before packed crowds, but eventually, with the emergence of radio and television, they included interviews and speeches in local and national news programs (Langston and Benton, 2009; Lomnitz et al., 2010). Some authors argue that the ruling party's presidential campaigns during this hegemonic period had no competitive purpose, but instead had a predominantly endogenous orientation (Lomnitz et al., 2010). In other words, their primary function was not obtaining a plurality of votes, but 'reconstructing internal [party] unity; building a presidential image for the PRI's candidate; [and] showing the party's and its leaders' strength to both the future president and society' (Lomnitz et al., 2010: 50).

Opposition parties' presidential nominees also carried out people-intensive, decentralised campaigns. However, due to their limited resources and heavy reliance on a quite reduced base of

⁸⁷ The IEPES operated as the party's permanent information and research unit on national and regional policy issues. The meetings with the IEPES usually lasted for hours, and involved presentations by several academics, specialists, and representatives of the sectors of the party on a wide number of policy issues, most often in the presence of the candidate.

⁸⁸ Before the organisational changes aimed at creating a corporative and centralised party structure were introduced during the administration of President Lázaro Cárdenas, the dominant party had failed to create a centralised party structure. Therefore, it fell to the local political bosses to maintain political order (Langston and Benton, 2009). For this reason, the presidential campaigns of the first half of the 20th century were mainly decentralised because they depended on the candidate's staff and the local political leader's organisational structures for electoral mobilisation. However, in subsequent elections, once the party had managed to create a national and centralised structure, presidential campaigns showed a higher degree of centralisation, evidenced by a more active role played by national party organisations in the campaigns of presidential candidates.

party activists and volunteers, their campaign efforts had much more limited territorial (and media) coverage and electoral mobilisation capacity than those of their PRI counterparts. This period could be termed what the comparative literature on campaign change identifies as the *Pre-modern* or *First Stage* of campaigning (Farrell and Webb, 2000; Norris, 2000; Gibson and Römmel, 2008). Some have labelled this traditional, labour-intensive style of campaigning the ‘tortilla’ Mexican model (Wallis, 2001).

Presidential election campaigns have modernised dramatically over the last two decades, as a result of major changes in the political and media systems. The six-month country-wide tour has given way to a professionalised, ‘hybrid’ style of campaigning that combines modern, poll-driven, and media-intensive campaign techniques with the more traditional labour-intensive techniques and mobilisation tactics based on clientelist exchange and patronage networks.⁸⁹ Like other campaign practices based on direct voter contact, candidates’ public appearances and events in municipalities across the country still continue to play a relevant role in the modern Mexican presidential campaigns of the three major parties. However, they are now strategically scheduled, and explicitly linked to the more modern media-management features of the campaign (Langston and Benton, 2009). In the case of opposition parties, campaign change was not only shaped by major transformations in the electoral and the media markets, but was also heavily dependent on major reforms to the regulatory framework of political financing that pertained in the 1990s (see Chapter 6). For the dominant party, on the other hand, professionalisation was primarily driven by external shocks that followed increasing electoral competition in the late 1980s. Since the PRI did not face the significant financing and media access constraints experienced by the PAN and the PRD, however, it was able to adopt a number of professional campaign innovations earlier than its rivals.

⁸⁹ A topic of particular interest in the literature on campaign change is the issue of ‘hybridisation’, understood as the ‘country-specific supplementation of traditional campaign practices with select features of the media-driven, postmodern style of campaigning’ (Plasser and Plasser, 2002: 348).

Party-centred theories of professionalised campaigning (Gibson and Römmele, 2001, 2009)

have stressed the role of external shocks (such as a heavy electoral defeat or a substantial fall in electoral support) in fostering campaign change (for an analysis on the role of external shocks in campaign professionalisation trends in the Southern Cone of Latin America, see Espindola, 2006). For the PRI, the substantial decline in its electoral support in the 1988 presidential elections and its first defeat in a gubernatorial election, when they lost to the PAN in the northern state of Baja California, in 1989, triggered a number of modern campaign innovations, involving the systematic use of computers and opinion polling and a profound reorganisation of the party's electoral mobilisation efforts, with increasing coordination and oversight from its *Comité Ejecutivo Nacional* (National Executive Committee - CEN) (Calderón and Cazés, 1996; Bruhn, 1997; Heras, 2009).⁹⁰

The high-tech, grassroots voter-mobilisation developments were also supplemented by an intensive media effort primarily carried out via indirect communication channels. The PRI took advantage of its position as the state party to secure favourable and extensive media coverage of President Salinas' administration policies (Bruhn, 1997; Lawson, 2002). For instance, *Televisa* not only provided lavish news coverage, but even 'donated' advertising air time to promote the National Solidarity Program (*PRONASOL*): an extensive, poverty-relieving program with an important clientelist exchange component (Magaloni et al., 2007).⁹¹ Campaign innovations were first

⁹⁰ According to a former party strategist and coordinator of the system of information on public opinion of the CEN, after the loss of the Baja California governorship the party president, Luis Donaldo Colosio, sent a number of party strategists to the United States and Western Europe in order to look for more sophisticated campaigning methods suitable to the Mexican electoral context (Heras, 2009). The new electioneering tools were mainly centred on the 'promoters of the vote' program, a systematic, large-scale, and poll-driven grassroots mobilisation effort aimed at reaching core supporters and independent but PRI-leaning voters. This mobilisation effort was coordinated by the national party leadership, but with the substantial involvement of state and local party organisations. The extent of the penetration of such canvassing and 'get-out-the-vote' efforts into the non-aligned voters' camp is uncertain. It seems more likely that they were more successful in getting back and reenergising the party base. However, as Bruhn (1997) argues, since canvassing efforts were carried out primarily through territorial rather than traditional corporatist party structures, they might also have reached out to voters outside such structures and the party's traditional base of support.

⁹¹ The program included the distribution of both private and public goods, so it was also an effort to reach out voters beyond its core clienteles, possibly due to the dominant party's electoral use of public resources.

introduced at the state and local levels in municipal and legislative races (Heras, 1999, 2009; Pichardo Pagaza, 2009), and then in the 1991 congressional and the 1994 presidential federal elections, contributing – alongside the electoral use of the *PRONASOL* – to the PRI's solid victories in these races.

The electoral reforms throughout the 1990-96 period (but mostly the 1996 reform) had a tremendous homogenising effect on the level of professionalisation of Mexican campaigns (Wallis, 2001; Langston, 2006; Langston and Benton, 2009). By the late 1990s, all leading parties (the PRI included) faced the pressures of increasingly open and competitive electoral and media markets (see Chapters 4 and 5). Nevertheless, in contrast to the past, the new regulatory framework provided them with substantial public funding, allowing them to use opinion polling, focus groups, professionally produced paid radio and television advertising, and other modern campaign innovations.⁹² Professionalising trends were clearly reflected in the structure of campaign spending of the three leading parties from 1997 to 2006 (see Chapter 6). I will now review a number of professional developments in campaign organisation, staffing, and research that took place in presidential elections during that period.

⁹² Pollster Jorge Buendía (2010) also considers that the key factor driving campaign change were the abundant resources provided by the 1996 electoral reform to all parties, in order to adopt expensive capital-intensive campaign techniques (personal interview).

Organisation

The value of fielding a professional campaign organisation is underscored by the fact that this is one of the few aspects of an election that is under the candidate's control

(Herrnson, 1992: 859)

Presidential systems usually provide substantial incentives to seeking personal votes and adopting candidate- and media-centric campaign innovations (Wlezien, 2010). Modern Mexican presidential campaigns are, as in many other countries which allow for the separate and direct election of the executive branch of government, essentially candidate-centric affairs.⁹³ In other words, not only are campaign strategies, tactics, and communications primarily focused on the promotion of the images of presidential nominees, but important campaign functions relating to the agenda, means, and organisation of campaigns are largely controlled and coordinated by individual candidates and their staffs rather than by their parties, with the substantial participation of professional consultants and agencies external to party organisations. This is not to say that parties are irrelevant, as in some other Latin American countries. The support base and resources they provide to individual candidates are still important – perhaps decisive – factors in Mexican presidential elections.⁹⁴ Here, I focus on a number of relevant changes and cross-party differences in presidential campaign management and staffing in Mexico from 1994 to 2006, involving the degree of campaign

⁹³ Zittel and Gschwend (2008: 980) define individualised or candidate-centred campaigns as those in which candidates 'actively seek a personal vote [...] on the basis of a candidate-centred organisation, a candidate-centred campaign agenda and candidate-centred means of campaigning'. By contrast, in party-centred campaigns the party label remains more important than individual images and reputations, and party organisations maintain a substantial degree of control over key aspects relating to the financing, management, and agendas of individual candidates' campaign efforts and communications.

⁹⁴ In Mexico, the degree of professionalisation and individualisation of campaigns largely depends on the type of office (whether an executive or a legislative post). While presidential campaigns – as well as campaigns for other relevant executive positions (e.g. gubernatorial races and a number of important *municipios*) – exhibit a high level of electoral professionalism and individualisation, legislative campaigns (both at the federal and the state level) remain more focused on parties than on candidates, and traditional, labour-intensive campaign practices still play an important role.

centralisation, the role of political consultants and parallel campaign organisations, the *timing* of campaign preparations, etc. Particular attention will be given to the relationship between national party structures and the candidates' campaign organisations, including the criteria used for campaign staffing.

Changes in campaign staffing

A prominent feature of professionalised campaigning relates to the increasing specialisation of campaign staffing, and the employment of external experts, political consultants, and agencies in election campaigns (Norris, 2000; Gibson and Römmele, 2001, 2009). In campaign environments characterised by technological change, and because of the growing complexity of media systems, candidates' campaign organisations increasingly demand highly specialised services and expertise which are often beyond their parties' organisational and financial capacity (Farrell et al., 2001). For this reason, candidates' willingness to include external advice and know-how into their campaign teams has become a crucial aspect of campaign professionalism. In fact, it could be argued that the extent of professionalisation of a given election campaign is heavily dependent on the choice and degree of specialisation of its staff.

Most modern campaign innovations in the organisation of presidential campaigns occurred in the historic election of 2000 (Wallis, 2001; Shirk, 2005). However, a number of professional campaign-management developments took place in the 1994 PRI presidential election campaign of Ernesto Zedillo (Mexico's president from 1994 to 2000). One of the most significant was the substantial degree of autonomy afforded the organisation of the presidential campaign with respect to the central party structures. This was reflected in the development of campaign headquarters as separate from the national party headquarters, and the introduction of a management team that handled Zedillo's campaign (Pichardo Pagaza, 2001). The extent of this separation, though important – since it provided a more specialised and centralised structure of command that facilitated a number of modern campaign developments – should not be overestimated. The divide between the

party and Zedillo's campaign organisation remained fuzzy, since a number of members of his team also held important positions in the CEN. Moreover, this separation did not mean that the national party structures played a minor role in the presidential campaign. During the first half of the 1990s, the PRI was a highly centralised, disciplined, and well-financed organisation. And the money and other campaign resources were predominantly controlled by the national party leadership (Heras, 2009). It was thereby able to direct these resources to congressional and presidential candidates crucial in mobilising the party's support base (Solis Camara, 1994). In fact, a former party leader, Ignacio Pichardo Pagaza, stated that the CEN was still in charge of the organisation of congressional campaigns in 1994. However, its role was more restricted and subordinate to the presidential candidate's team than previously (Pichardo Pagaza, 2001, 2009).⁹⁵

As in the case of Zedillo's race, the degree of professionalisation exhibited by opposition candidates' campaign organisations was substantially affected by the resource availability and characteristics of their respective parties. Compared to the PRI, opposition parties – particularly the PRD – were quite small and resource-poor. However, while the PRD was a new, factionalised, disorganised, decentralised, and undisciplined party, the PAN was an already established, relatively centralised, disciplined organisation with substantial capacity and experience to back the campaign of its presidential nominee. Consequently, the campaign of the PAN's presidential candidate, Diego Fernandez de Ceballos, followed a predominantly party-based management model, with no major

⁹⁵ Before 1994, the CEN was mostly responsible for the coordination of presidential and a large number of congressional campaigns (for an analysis on PRI congressional campaigning during the authoritarian period, see Langston, 2006; Langston and Morgenstern, 2009). The presidential campaign headquarters were usually integrated within the national party headquarters, which contributed to the substantial involvement of the party's national leadership and sectorial organisations in the campaign efforts of presidential candidates. By contrast, Ernesto Zedillo placed its campaign staff in a separate (and distant) location. This upset the general party secretary (soon to be party president) and 'official' campaign manager, since 'it showed a deliberate detachment from the party' (Pichardo Pagaza, 2001: 72). Indeed, the distance was not only physical, but also reflected a shift in the management of the PRI's presidential campaign towards a more party-distant model, since the candidate and his team coordinated the campaign without much interference from the national party leadership (Pichardo Pagaza, 2001, 2009).

separation between the party and the candidate's campaign organisation. Nevertheless, this did not place major obstacles in the way of some modern campaign innovations. In spite of the party's limited public funding and fundraising capacities, which prevented it from running a more capital- and media-intensive campaign, the national party leadership acknowledged the importance of a changing campaign environment, and was able to explore innovations such as opinion polling, the use of computerised call centres, and moderate amounts (around one third of its limited resources) of paid radio and TV advertising on behalf of its presidential candidate (see Chapter 6).

The party that paid less attention to professionalised campaigning was the centre-left PRD. Like the PRI candidate, the PRD presidential nominee, Cuauhtémoc Cárdenas, sought to create a campaign structure that was directly under his command, so that he could establish general strategy and coordinate his campaign with substantial autonomy from his party (Romero Miranda, 1994). In the end, however, Cárdenas' campaign organisation remained principally composed of party members and just a few external advisors (Aguilar Zinser, 1995). Some of them, including his campaign manager, Adolfo Aguilar Zinser, advised Cárdenas to professionalise his campaign and adopt a number of modern, media-oriented innovations, such as a centralised campaign unit along the lines of the Clinton's 'war-room' in the 1992 U.S. presidential election, the use of professional communication consultants, polls and focus groups, media management, and advertising techniques.

Yet, most of their modernising efforts were blocked either by the candidate himself or by party bureaucrats, who preferred to run, as in 1988, a more traditional, grassroots-oriented campaign (Aguilar Zinser, 1995; Bruhn, 1998). The Cárdenas team initially considered employing U.S. campaign consultants; however, this initiative was ultimately abandoned, mainly due to the PRD's financial and media-access constraints. Later on, Cárdenas was advised by a Chilean consultant, Juan Forch, but this advice did not play a substantial role in his campaign (Aguilar Zinser, 1995; Oppenheimer, 1996). It should be noted, nevertheless, that the Cardenas campaign suffered not only financial but also important internal party organisational constraints. According to Aguilar Sinzer

(1995), professionalising the Cardenas campaign would also have required major changes in its management and staffing criteria if it were to privilege efficiency and expertise over loyalty and partisanship, as well as a considerable degree of displacement of party officers by non-party campaign professionals. These were requirements that the candidate ultimately refused to accept.

In general, campaign staffing and management during the 1994 presidential election remained predominantly party-based. The leading candidates' use of outside campaign experts, PR, media, and image-management consultants – as seen in the U.S., Western Europe, and other Latin American countries – was comparatively limited (see, for an analysis of the Brazilian case, da Rocha Neto, 2007). Even for the PRI, the employment of non-party specialists was basically restricted to local political marketers, pollsters, and advertising agencies; the opposition parties' use of external campaign expertise was even less.

Major transformations in campaign staffing and management had to wait until the 2000 elections. In contrast to 1994, all leading candidates showed more willingness to look beyond the resources and expertise provided by their respective parties. None did it as intensively and effectively as Vicente Fox, the PAN presidential nominee and eventual winner of the election. Indeed, much of Fox's victory is explained by the type of *candidate-centred*, professionalised campaign organisation, along with centrist messages that allowed him to retain his party's base, while drawing in independents and weakly attached voters whose main desire was for democratic change (Magaloni and Moreno, 2003; Moreno, 2009b). Fox and his campaign team were indeed pioneers in the transformation of the mechanics of running a presidential election in Mexico. They introduced a number of important campaign management innovations that were not previously seen in Mexican electioneering, such as a great degree of autonomy for the candidate's campaign organisation with respect to his party, the use of para-party fundraising structures, and the employment of a wide range of non-party campaign professionals. All of these developments played important roles in his successful presidential bid.

The Fox campaign team included a number of local experts on opinion polling, marketing, advertising, and media management, as well as U.S. political consultants like Dick Morris, Rob Allyn, and Alan Stoga. The team was supported by over 100 staff at the candidate's campaign headquarters, and thousands of party and campaign activists across the country (Wallis, 2001). The core of the candidate's campaign was the National Campaign Committee (NCC), which comprised the candidate and coordinators in charge of the departments of marketing, press, politics, operations, income, and expenditure. It also included representatives of the PAN's National Executive Committee (CEN), including the party's president (Cantú, 2001; Wallis, 2001; Bucio and Gutiérrez, 2005). However, it is important to note that the campaign coordinators and other key members of Fox's campaign team were appointed by the candidate himself, and the selection was based on their merits and expertise rather than on personal or partisan loyalties. For instance, the campaign manager, Pedro Cerisola, and the director of marketing, Francisco Ortiz, were both recruited by head-hunters, mainly because of their successful careers in the private sector (Cantú, 2001; Wallis, 2001; Bruhn, 2004). Conversely, staffing in Cárdenas' campaign was, as in his previous presidential bids, predominantly based on personal loyalty. Most of his team, including his campaign manager and close advisors, consisted of individuals whose main asset was their closeness to the candidate (Bruhn, 2004). In fact, Cárdenas ran with practically the same team as in 1994 – with important defections, though, since those advisors who had tried unsuccessfully to persuade him to follow a more modern campaign approach in 1994 migrated to Fox's camp.

Like Fox, the PRI's presidential candidate, Francisco Labastida, relied on a highly specialised campaign structure that included local experts in polling, marketing, and advertising, as well as foreign political consultants. His party also provided him with experienced campaign managers and strategists. However, the internal dynamics of Labastida's campaign were shaped by tension and conflict between different party factions, particularly the traditional *político* and technocratic wings. A number of analyses show that this divide constrained important strategic choices in the PRI's

presidential campaign, including the candidate-selection phase and a number of key campaign functions such as staffing, management, research, and communication (Flores Rico, 2000; Reveles Vázquez, 2003; Bruhn, 2004; Bucio and Gutiérrez, 2005; Rottinghaus and Alberro, 2005). These analyses strongly suggest that the assignment of campaign responsibilities, as well as the initial composition of and subsequent changes to the Labastida team, were primarily mechanisms to balance power and influence over the candidate's campaign among different party groups, and did not denote a search for competence. These staffing criteria ended up being detrimental to his campaign. According to a party insider, Labastida's team was characterised by

lack of consistency between appointments, functions, and tasks, no correspondence between the real hierarchies and formal responsibilities, and inconsistency and lack of communication between those responsible for the [campaign] strategy and those responsible for its execution (Flores Rico, 2000: 133; translation mine).

Party insiders and campaign staffers also complained that the recurrent disputes among PRI factions fostered indiscipline and an excessive fractionalisation in the command structure, which obstructed the execution of important strategic decisions (Flores Rico, 2000; Bucio and Gutiérrez, 2005). The disputes inside Labastida's team seems to have been representative of many struggles within the PRI on how best to approach campaigning in a newly competitive electoral market; a fight between those leaders of the territorial party's base that preferred to rely on a more traditional, grassroots-oriented campaign style (based on rallies and clientelist exchange practices), and those who were not tied to the party base and thus favoured a more poll-driven and media-based campaign model (Langston and Benton, 2009).⁹⁶

⁹⁶ According to Langston and Benton, these leaders are quite sceptical about *old-fashioned* campaigning methods since they 'strongly believe that that most part of the money that is invested in *invigorating the*

Candidates' concerns about intra-party unity have directly shaped staffing and management in Mexican presidential campaigns.⁹⁷ Although such worries have frequently involved a trade-off between party cohesion and competence, they have not been without reason. Along with a poor communications strategy and image management, party divisions proved devastating for the campaign of Roberto Madrazo, the PRI presidential nominee who trailed in third place in the 2006 elections (Cheng, 2008; Langston, 2009). Similarly, party unity concerns also forced Andrés Manuel López Obrador (AMLO), the PRD presidential candidate, to appoint Jesus Ortega, the leader of a rival party faction, who had limited media expertise, as his campaign manager, after he refused to back Ortega's attempt to become the PRD candidate for mayor of Mexico City (Bruhn, 2009). Ultimately, like their respective predecessors, López Obrador and Madrazo found it quite difficult to isolate their campaign organisations from intra-party conflicts, disputes, and divisions in order to make them more autonomous and specialised.

Compared to Vicente Fox's campaign, the organisation behind the 2006 PAN candidate, Felipe Calderón, followed a less party-distant model. However, he was also able to appoint his campaign team with significant degrees of freedom, and still count on the national party organisation's full support and resources. Like Fox, he managed to put together a small group of experts and professionals that was more capable of rapidly adapting and learning from its strategic mistakes than its PRI and PRD counterparts (Bruhn, 2009; Freidenberg and González, 2009). On the other hand, like the Cárdenas campaigns, important decisions in López Obrador's camp were made

party's base is stolen by these more traditional party leaders and does little to win votes on Election Day' (2009: 147-48).

⁹⁷ In fact, as Bruhn argues (2004), Labastida's nomination was in large part an effort to maintain party cohesion rather than appeal to voters beyond the PRI's core base. In the end, after a hard-fought, open, internal primary, 'the winning candidate was – if not the first choice of many groups – perhaps the least objectionable. Labastida's curriculum placed him as a reasonable compromise between the *técnico* and the *político* ends of the divide within the ruling party' (Bruhn, 2004: 126).

by the candidate alongside a close circle of collaborators with whom he had strong relationships of trust and loyalty (Camacho Guzmán and Almazán, 2006). They nevertheless ‘relied in a very limited fashion on professionalism, and lacked sensitivity toward changes that occurred in the electoral environment. It was very difficult for this group to take on positions that were not simply a reiteration of the candidate’s views’ (Lomnitz et al., 2010: 282). The campaign style management of the PAN candidate was more professional. Certainly, as Lomnitz et al. (2010) note, Calderón’s team was made up of a restricted group of persons who had collaborated with him during his time as Secretary of Energy in Fox’s cabinet. ‘However, decision making had a more equitable character, and the campaign strategy was based on measuring public opinion and giving marketing criteria considerable weight’ (Lomnitz et al., 2010: 282).

The role of political consultants

The role of political consultants in presidential election campaigns in Latin America has often been overestimated by scholars and commentators. Considering the low level of party system institutionalisation, the weakness of party organisations, and the prevailing candidate-centric nature of political competition in most countries of the region (Mainwaring and Scully, 1995; Mainwaring, 1999; Payne, 2007), one might expect consultants to have a prominent influence over electioneering. Nevertheless, a number of comparative studies on campaign professionalisation trends in Latin America show that there is significant cross-country and cross-party variation in the extent of the use and influence of non-party campaign experts (Martz, 1990; Angell et al., 1992; Mayobre, 1996; Waisbord, 1996; Priess and Tuesta Soldevilla, 1999; Espíndola, 2002; Cotrim-Macieira, 2005; Espíndola, 2006; da Rocha Neto, 2007). While many case studies argue that the consultant’s decision-making role is on a par with, or even above, that of party elites and officials, some others contend that, although important, the role of campaign consultants in Latin America seems to be quite restricted, especially compared to the U.S., and that it is perhaps more similar to the UK and other West European democracies, where, as Norris points out (2000), they act as part-time external

advisors who supply valuable know-how, but without displacing politicians, who are still predominantly in control of the campaigning process (for an analysis on the differences with respect to the role and influence of consultants in Latin America see, Espíndola, 2002, 2006; da Rocha Neto, 2007).⁹⁸

The local-politics consultancy industry developed rapidly, which is reflected in the increasing availability of professionals and experts from the media, advertising, marketing, and public-relations industries. Yet, it is still far less sophisticated than in the U.S. While the local-polling industry is well developed, other areas, relating to political marketing, image and media management, opposition research, etc. are much less so. Some pollsters, for instance, point to the lack of experts on the fields of campaign management, strategy, and advertising, especially at the sub-national level (Heras, 2009; Valdés Cervantes, 2009; Buendía, 2010). The federal system means that there are lots of elective executive and legislative posts at the federal and statewide levels. Nonetheless, whilst presidential, gubernatorial, and several mayoral races demand substantial professional expertise, congressional and legislative candidates in many electoral districts, who have tighter budgets, tend to run more retail, grassroots-based campaigns (Aceves González, 2005; Langston, 2006).

Foreign consultants

In Mexico, as in other countries of the region, foreign consultants have often been incorporated into candidates' campaign staffs, and have contributed – alongside party strategists, local-political marketers, pollsters, and media and image management specialists – to framing important campaign decisions. However, more often than not, decision-makers have been more closely associated with

⁹⁸ In their study on communication campaigns in the German case, Bergmann and Wickert (1999: 456) note that 'Germany does not (yet) have a category of professionals who hire themselves as *political consultants*', and that German candidates 'can – and indeed must – refer back to career staff members in the party organisations'. They further argue that the importance of advertising agencies responsible for designing and producing campaign ads is often overestimated. Ultimately, they 'are non-decision-making consultants who are required to follow rules laid down for them by the parties' (1999: 456-457).

the candidates themselves and their tight inner circle of close advisors. Moreover, the extent of foreign experts' influence on campaign strategies has differed significantly across parties. In the case of the PAN, foreign advisors such as Dick Morris, Rob Allyn, and Antonio Sola have played a key and influential role in the presidential campaigns of Vicente Fox in 2000 and Felipe Calderon in 2006. Their strategic advice and expertise were considered decisive in both election wins, according to campaign insiders, scholars, and commentators (Bucio and Gutiérrez, 2005; Camarena and Zepeda Patterson, 2007; Bruhn, 2009).

In contrast, the participation of two top international consultants, James Carville and Stan Greenberg, in Labastida's campaign was, though considerably restricted by party elites, ultimately seen as a contributory rather than preventative factor in the historical PRI defeat in 2000 (Flores Rico, 2000; Bucio and Gutiérrez, 2005).⁹⁹ This was, perhaps, the main reason behind the reliance of Roberto Madrazo on local marketing and advertising experts, pollsters, and experienced party strategists – most of them members of the CEN of the PRI and close allies of the candidate as well – in 2006 (Langston, 2009).¹⁰⁰ The campaigns of PRD presidential candidates have not been substantially different in this regard. Both Cárdenas and López Obrador made only limited use of foreign campaign expertise, and preferred instead to rely on party strategists and local experts in polling and advertising.

⁹⁹ Party and campaign staffers argued that they lacked relevant knowledge about the Mexican electoral context. Therefore, their strategic approach was considerably misguided. Bruhn (2004) made a similar claim. Dick Morris and James Carville were engaged in the 1999 Argentinean presidential election: the former worked with Fernando De la Rua, and the latter with Ernesto Duhalde. As he did with De la Rua's campaign, Morris defined 'change' as the key campaign issue of Fox's campaign. And Carville defined 'empowerment' as the key issue of Labastida's campaign. Again, only the former proved to be a winning strategy.

¹⁰⁰ Initially, Madrazo's media strategy was guided by the Spanish consultant David Pons. However, after the poor performance of the candidate in the first months of the campaign (especially in the first of two televised debates) he was fired, alongside most of his external campaign and media advisors.

Para-party campaign structures

Campaign structures parallel to party organisations were not used at all before the 2000 presidential election. Vicente Fox was the first presidential hopeful to use this type of campaign vehicle to mobilise early grassroots and financial support for his candidacy. On September 16, 1998, he created *Amigos de Fox* (Friends of Fox), an organisation similar to a U.S. political action committee. The resources provided by the *Amigos* allowed Fox to run his pre-campaign largely independent of the PAN's national and state executive committees, and made possible the substantial separation of the candidate's campaign organisation from niche-oriented and ideologically charged party elites and structures. In turn, this provided his campaign strategists with substantial degrees of freedom to develop a centrist, change-focused message that successfully mobilised voters beyond the PAN's traditional base (Greene, 2007). Raising independent campaign resources and extra-party grassroots support for his nomination campaign was perhaps the principle reason for Fox to create a para-party organisational structure, but hardly the only one.¹⁰¹ The other power reason was to supplement the small activist base and electoral mobilisation weaknesses of his party (Cantú, 2001; Bucio and Gutiérrez, 2005). In contrast to the PAN, *Amigos de Fox* was designed as a very flexible organisation with loose affiliation rules that fostered rapid growth. Consequently, it provided Fox's campaign with a considerable activist base that even rivalled the PAN membership, and it was better placed than the party's territorial structures to attract and mobilise the support of non-*panistas* sympathisers and independent voters.¹⁰²

¹⁰¹ As discussed in Chapter 5, state campaign subsidies are distributed among national party organisations, and this distribution is predominantly controlled by national party elites, not by individual candidates. Therefore, presidential hopefuls, such as Fox, who do not have the full support of the national party leadership, often have to resort to alternative financing sources to run their nomination campaigns. *Amigos* was key for this purpose, since it contributed around US\$16 million to finance Fox's pre-campaign, and over US\$28 million in the general election (more than 57 percent of the legal campaign spending limit) (Greene, 2007).

¹⁰² It is important to note that the PAN introduced major changes to the rules of party recruitment in 1997. Innovations involved more flexible and centralised affiliation procedures, including the introduction of a new type of membership (*adherents*) with more restricted rights and without the full privileges of the active

By contrast, Labastida's campaign organisation was heavily dependent on the traditional electoral mobilisation structures and resources of the PRI. Like Fox, Labastida created his own para-party structure, *Redes 2000* (*Networks 2000*), in order to seek votes beyond the PRI's traditional base. However, *Redes* played a rather modest role in his campaign. Although it may have helped mobilise substantial support for his nomination during the internal primary election, as with previous PRI presidential candidates most of Labastida's' electoral mobilisation efforts in the general election relied on the PRI's territorial and corporatist structures. Unfortunately for Labastida, such structures, as well as his own personal mobilisation network, had little success in reaching voters outside the party base; mobilising the party's core voters was, unlike the past, insufficient to win the election.

Continuity, rather than change, characterised campaign management and staffing in the third failed presidential bid of Cuauhtémoc Cárdenas. Unlike Fox and Labastida, Cárdenas established no parallel structure at all; instead, his campaign relied entirely on the organisational structures of the PRD and the other parties that comprised the left-wing *Alliance for Mexico*. This became a liability during the election, due to the organisational and electoral mobilisation weaknesses of the PRD and the rest of the parties in the coalition, particularly when compared to the PRI and the PAN.¹⁰³ López Obrador did establish a parallel campaign structure, *Redes Ciudadanas* (citizens' networks), in 2006; however, its role was more restricted than the one created by Fox, since its

members (such as to run or vote for leadership positions and candidacies) (Mizrahi, 2003; Shirk; 2005; Greene, 2007). This allowed the PAN to substantially increase its activist base while heavily restricting the newcomers' participation and influence on key internal party affairs, especially the candidate and leader selection processes. However, despite such developments, the party's total membership still remained comparatively small. It increased from around 100,000 in 1996 to 472,387 in 1999, and reached almost 600,000 members in 2000. *Amigos*, in contrast, increased rapidly, from 2000 members in June 1998 to 206,000 by the end of 1999; by February 2000 it reported 2 million members, and on the eve of the election it claimed to have 4.8 million members (Wallis, 2001; Greene, 2007).

¹⁰³ This was also paradoxical, since PRD candidates tend to be heavily dependent on their own campaign structures (parallel to party organisations) for electoral mobilisation and fundraising-related activities, etc. Moreover, as Greene argues, the 'type of campaign management and strategy of the PRD's candidate, Cuauhtémoc Cardenas, left him constrained to his party's resources and made traditionally leftist appeals that did not resonate with the average voter' (2007: 211).

primary objective was to overcome the organisational weakness of the PRD and the other parties that supported his candidacy. In the end, *Redes Ciudadanas* was not as successful as expected, which was reflected in its inability to monitor all the polls on Election Day, and so prevent fraud by other parties' operatives and representatives. Unlike Fox's in 2000, the Calderon campaign relied more on the PAN's organisational structure. Whereas there was a difficult relationship between the PRD and its presidential nominees, which tended to obstruct further professionalisation, the PAN's national and local structures became quite effective in supporting the campaigns of its candidates, including Calderon's.

Campaign preparations

Permanent/continuous campaigning

Timing is a crucial issue in modern election campaigns. One of the most pervasive features of professionalised campaigning is the intensive use of communication and media-management tactics and strategies to build and maintain electoral support well beyond official election periods. Much of the literature on modern campaign preparations focuses on the idea of permanent campaigning as the strategic use of office, polling, political marketing, and news-management techniques by elected individuals, parties, and politicians in building and maintaining popular support, not only during an election but also between election periods (Lilleker, 2006). Here, however, I choose to treat the concept of continuous campaigning as the use of a number of professional campaign practices (opinion polling, media management, paid advertising, etc.) by the candidates' teams at a point well before the beginning of the legal campaign season (Gibson and Rommelle, 2009).

Although some electoral communication strategies employed during the late 1980s and early 1990s may have resembled the sorts of modern, long-term campaign preparations seen elsewhere, Vicente Fox was the first presidential candidate to engage in a professional and continuous

campaigning effort.¹⁰⁴ On July 6 1997, three years before the 2000 presidential election, Fox, by then governor of the state of Guanajuato, publicly declared his ambition to secure the PAN's presidential nomination. Around one year later he created *Amigos de Fox* to help raise funds and court independent voters for his nomination campaign. Fox's early campaign efforts were crucial in allowing him to appeal to the electorate at large, and circumvent the obstacles posed by the PAN's regular nomination rules and procedures and the resistance of the national party leadership to his candidacy (Mizrahi, 2003; Bruhn, 2004; Shirk, 2005; Greene, 2007).¹⁰⁵ In addition to mobilising broad grassroots support at the national level, *Amigos* distributed campaign merchandising and sponsored an early television campaign, which started in July 1999. At this time, the PRI and the PRD were still struggling to select their presidential candidates, but Fox had not only already managed to discourage all of his internal competitors and win the PAN's nomination, but also to position himself among the electorate at large as the most viable opposition candidate to end around 70 years of single-party rule. As Wallis points out (2001: 233), 'the long campaign gave Fox a good degree of momentum in the race to head the opposition. While Cardenas grappled with the problems of Mexico City, Fox built up a solid base for his presidential bid'.

The campaign preparations of the PRI's presidential nominee were considerably shorter than Fox's. Moreover, campaign insiders agree that Labastida's campaign was an interrupted rather than a continuous effort. Although Labastida's team managed to get substantial media attention and public support following the first open primary election held by his party, in early November 1999, the huge

¹⁰⁴ Some would argue that Cardenas' campaign preparations for the 1994 presidential election were long-term, since they started soon after he lost the 'controversial' election of 1988 (Romero Miranda, 1994; Aguilar Zinser, 1995). However, despite this long preparation period, most of Cardenas' campaign efforts were rather labour-intensive, with practically no professionalised campaign activities, such as media management. Similarly, a number of poll-driven media-management strategies employed during the same period by President Salinas' administration closely resemble permanent campaign trends seen elsewhere (Lawson, 2002).

¹⁰⁵ Fox's pre-campaign also used negative campaign tactics and advertising to counteract the PRI reformist campaign, which included an open primary election designed to portray it as a renewed, democratic party (Greene, 2007).

financial cost of organising such a massive event caused a relatively short – but quite damaging – hiatus in Labastida's media campaign during the last two months of the pre-campaign (November and December) and the first month (January) of the official campaign periods (Flores Rico, 2000; Bucio and Gutiérrez, 2005).

Campaign preparations made by the PRD-led *Alliance for Mexico* candidate were no more seamless. This was striking, since Cárdenas had won the newly created election for mayor of the Federal District of Mexico City in the 1997 mid-term elections. Thus, he was, to some extent, in a better position than his rivals to use his office to attract media attention and build popular support, since most of the national media are concentrated in the capital city. However, when he resigned in 1999 to become the presidential candidate of his party for the third time, he had by then already lost the chance to do so. Cárdenas' administration and policies were generally seen as lacklustre rather than innovative or popular, and his team struggled to develop an effective media-management strategy (Bruhn, 2004). While Fox actively sought news media attention and intensively advertised his administration's achievements and innovations in the governorship of Guanajuato, Cárdenas preferred to keep a low profile. He 'refused to publicize his achievements and often repeated that his was an administration of action, not advertising' (Greene, 2007: 238). Besides, the relationship between his administration and the media was, in general, difficult, and with *TV Azteca* – the second national television network – extremely adversarial.

Continuous campaigning trends continued in the 2006 presidential election. The candidate of the PRD-led *Coalition for the Good of All* (*Coalición por el Bien de Todos*), Andrés Manuel López Obrador (AMLO), started his campaign practically the day after his election as mayor of Mexico City in July of 2000. Unlike his predecessor, AMLO took great advantage of this position to secure media coverage and popular support at the national level. His strategy consisted of combining ambitious public works projects for the middle class and populist policies for the urban poor (Bruhn, 2009) with effective media management and large-scale, paid advertising to publicise the achievements of his

administration (Trejo Delarbre, 2010a). One of his most effective news-management strategies involved organising daily press conferences – held in the early morning – which provided him with a significant degree of influence over the agenda of the Mexican city-based media, most of them with national audience reach (Pérez Cristino and Cuna Pérez, 2006). López Obrador was also quite careful to cultivate a cooperative relationship with major private broadcasters, and made frequent media appearances on diverse programmes ranging from regular newscasts to infotainment (Trejo Delarbre, 2010a). His strategies were very effective, and at the end of his term he had managed to position himself as the leading presidential hopeful at the polls.

The campaign preparations of the PAN candidate in 2006 were considerably shorter than AMLO's – and also Fox's in 2000. Felipe Calderon started his campaign around one year before the election, after his resignation as Secretary of Energy. However, due to PAN's presidential candidate selection process (a closed primary), he focused most of his efforts during the pre-campaign period on mobilising support among PAN members and sympathisers, rather than among the electorate at large. This resulted in a moderate use of professional campaign practices during the nomination campaign. The PRI candidate, Roberto Madrazo, started his campaign soon after he won the presidency of his party in 2002. However, from his position as party leader he was less successful in influencing the national media agenda than AMLO.¹⁰⁶

¹⁰⁶ It is important to note that other pre-candidates of the PRI sought media attention so as to increase their public visibility and profile. For instance, Arturo Montiel, governor of the State of Mexico and the strongest of Madrazo's competitors seeking the PRI nomination, also invested large sums of money in paid advertising and professional media management in order to build public support.

Research

Over the past 60 years, opinion polls have changed the nature of electioneering. Only the advent of television has had a greater effect
(Butler, 1996: 236).

Indeed, research into public opinion plays a major role in modern election campaigns. In the U.S., for instance, candidates and their campaign teams base their communication tactics and strategies upon much of the information gathered through a wide range of polling techniques and focus groups (Friedenberg, 1997; Burton and Shea, 2010). In Mexico, public opinion polls were introduced in the 1988 presidential election, and then widely utilised during the Salinas administration (1988-1994). They were intended to measure – and build – popular support for his neoliberal policies (Moreno, 1996).¹⁰⁷ However, it was not until the early 1990s that private polls were systematically used by the PRI as a method for tracking voters' responses to its campaign efforts. For most of the 1980s, the PRI – and the rest of the parties – primarily relied on traditional ways of generating campaign feedback, such as the size of attendance at rallies and the 'impressionistic' feelings of candidates, party bosses, and activists on 'how things were looking' in their respective districts, supplemented by occasional surveys.¹⁰⁸

For the PRI, the effectiveness of such traditional forms came increasingly into question after the 'scare' of the 1988 presidential election. However, it was only after the 1989 defeat in Baja

¹⁰⁷ The political use of polling during the Salinas administration, and the proliferation of dubious surveys, negatively affected the credibility of polls among Mexicans, since they were often regarded as so closely tied to the PRI government (Camp, 1996). It was not until the 1994 elections that they were accepted by the public, in large part because they were increasingly financed and publicised by the media and regulated by the electoral authority.

¹⁰⁸ In the case of the PRI congressional candidates, for instance, campaign evaluations and monitoring from the national party leadership often took the form of asking the candidate how many lunches he had organised and attended (Langston and Morgenstern, 2009: 30).

California that the national party's leadership finally acknowledged that these methods were no longer reliable ways of tracking voters' intentions in a context of increasing electoral competition, and decided to establish an 'in-house' public-opinion research unit to use polls in a more systematic fashion (Heras, 1991, 1999, 2006, 2009).¹⁰⁹ Polling developments were extensively applied, first during state-wide and local campaigns, and then during the federal mid-term congressional campaigns of 1991, in support of candidate selection processes (Pichardo Pagaza, 2009). They were also intended to provide a more precise way of targeting voters, measuring voting intentions, backing the development of media appeals, and assessing the penetration and effectiveness of the opposition parties' – and their own – campaign efforts and communications (Heras, 1991; Bruhn, 1997; Heras, 1999, 2009).¹¹⁰

Scientific survey research also played a major role in the PRI presidential campaign of 1994 as a form of voter feedback. Zedillo's campaign team had access to a large and reliable research base that included 25,000 quantitative interviews, 400 focus groups, and an exit poll (Oppenheimer, 1996). Polls were used to identify and target relevant electoral segments, track voting intentions, provide a continuous update on the positioning and evolution of the attributes of the candidate, assess Zedillo's – and rival candidates' – strengths and weaknesses, select and define the issues of his campaign, and test the penetration and effectiveness of campaign messages (Solís Cámara, 1994; Oppenheimer, 1996). Alongside surveys, focus groups also provided valuable input to assess the

¹⁰⁹ According to pollster and former PRI campaign strategist María de las Heras (2009), the defeat in Baja California was the triggering factor of systematic changes in the campaign feedback methods of the PRI, since the party's traditional sources of campaign feedback failed to foresee the outcome of the election, and actually predicted a solid PRI win (personal interview).

¹¹⁰ By 1991, the relatively good economic performance of President Salinas' administration and the electoral use of PRONASOL had prevented, to some extent, further dealignment, and significantly counteracted realignment trends among the Mexican electorate. Aggregate data analysis and the intensive – and extensive – polling efforts carried out by the CEN's public opinion research unit allowed PRI strategists to track relevant changes and continuities in the structure and behaviour of the electorate, divide the electoral market into relevant segments (particularly to distinguish core supporters from leaners and independent voters), and target them accordingly (Heras, 1991, 2009).

candidate's issue research and image management, influence the design and evaluate the impact of the campaign message – particularly of the definition of Zedillo's campaign slogan *Bienestar para tu familia* (wellbeing for your family) (Solís Cámara, 1994).¹¹¹ It should be noted, nevertheless, that interviews with former party president Ignacio Pichardo Pagaza (2009), and former secretary of the Electoral Action of the CEN Humberto Lira Mora (2009), indicate that other sources of voter feedback, such as polling-place/precinct-level election data, also played an important role in the party's market segmentation analysis in that election, particularly in congressional campaigns.

In contrast to the PRI, survey research had only a marginal impact on the PRD presidential campaign. The Cárdenas team commissioned just one benchmark poll and ten focus groups. Even still, he and most of his close party advisors questioned their validity, and even disregarded them, relying instead on the crowds that greeted the candidate at every campaign rally (Aguilar Zinser, 1995). This reliance on traditional over modern forms of campaign feedback led Cárdenas to overestimate his actual support base, and limited his team's capacity to track changes in public opinion and voter preferences that would have allowed him to adjust the campaign strategy and messages accordingly.¹¹² The PAN, on the other hand, was more open to new technologies and modern polling techniques. Without matching the PRI's extensive and sophisticated private polling and focus-group research, and despite its limited campaign resources, it made some significant advances in professionalising its campaign feedback methods. The national party leadership

¹¹¹ The PRI relied extensively on polls and focus groups for market segmentation. According to Solís Cámara (1994), given that the PRI's macro-partisanship was still significant among the electorate, the Zedillo campaign strategy was twofold. It sought to mobilise the PRI core supporters (according to the campaign polls, 30 percent of actual voters), and obtain additional support from PRI-leaning independent and undecided voters, whose voting decisions depended more on short-term factors linked to the images of candidates and to campaign issues. The mobilisation of the PRI base was addressed through direct, people-intensive, face-to-face contact tactics, primarily carried out via the party's organisational structures. Independents and undecideds, on the other hand, were addressed by means of media appeals based on a careful segmentation into voter subgroups (Solís Cámara, 1994).

¹¹² For instance, most of the campaign issues that Cardenas stressed in his speeches ranked quite low in voters' preferences, according to Zedillo's campaign surveys (Oppenheimer, 1996).

established computer centres in order to conduct opinion polls and gather and process electoral results (Mizrahi, 1998). Despite these developments, the use of scientific survey research by opposition parties in 1994 ultimately remained limited, and the one party that made intensive use of a wide range of polling techniques and focus groups was the PRI.

The 1996 electoral reform rendered costly, modern polling methods much more accessible to opposition parties. As a result, they were employed on a more regular basis by parties and candidates in federal and state-level elections during the late 1990s. Even the once reluctant Cárdenas made more systematic use of surveys and focus groups to select relevant campaign issues and test the penetration and design of its campaign messages in his successful race for mayor of Mexico City in the 1997 mid-term elections (Bruhn, 1999). Unlike 1994, all leading presidential contenders made wide use of survey research in the 2000 elections, but no one did it as intensively and effectively as the candidate of the PAN-led Coalition for Change (*Coalición por el Cambio*).

Fox's campaign team used daily tracking polls (Greene, 2007), seven in-depth, monthly cross-national surveys (Rottinghaus and Alberro, 2005), and a large number of qualitative interviews and focus groups (Lara and Rojas, 2002). Private polling was used to 'determine the potential of the Mexican public to be persuaded by an opposition candidate, to provide a continuous update on how the campaign strategy was working, to assist in solidifying Fox's image and message of change' (Rottinghaus and Alberro, 2005: 143). Fox's campaign strategists also drew heavily on polling for market segmentation. They used surveys to select issues that were most important to particular segments of voters (e.g. undecided) and tailor campaign messages accordingly, and test the effectiveness of Fox's media appeals (Bucio and Gutiérrez, 2005). They also made extensive use of qualitative methods for candidate, issue, and opposition research, to assess the effectiveness of the radio and TV ads and to develop rebuttals to negative attacks (Lara and Rojas, 2002). Fox's campaign feedback was also supplemented by a sophisticated website that provided comprehensive and relevant campaign information, as well as occasional interactive chat-room sessions with the

candidate. Alongside the data gathered through systematic survey research, Internet feedback provided the Fox team with relevant insights into the thinking of younger, more educated, first-time voters (Wallis, 2001, 2003) – a segment that supported him and was crucial if he was to win the election (Camp, 2003).

Perhaps the key difference in the use of modern survey research between Fox and the other leading presidential candidates was not a matter of intensity but one of integration with overall campaign strategy.¹¹³ Labastida's campaign team hired the services of the *Gould Greenberg Carville N.O.P. (Polling Strategy and Communication)*, an international political consulting firm set up by Philip Gould, Stanley Greenberg, and James Carville (Losada, 2000). The firm worked with local market-research companies to provide extensive polling feedback, qualitative research, and strategic communication advice (Bucio and Gutierrez, 2005).¹¹⁴ However, as in the case of campaign management and staffing, the divide between the technocratic and the traditional PRI factions affected Labastida's campaign research and communication functions. Whereas feedback from modern research methods fed directly into Fox's campaign strategy, a number of strategic decisions made by Labastida's team drew instead on the input provided by the PRI's traditional territorial and corporatist structures (Bucio and Gutiérrez, 2005; Rottinghaus and Alberro, 2005). This was, for sure, a significant step backwards when compared to the Zedillo campaign in 1994, which relied on modern research techniques as its primary source of voter feedback (Solís Cámara, 1994).

And so Esteban Moctezuma Barrágan, initially Labastida's (and formerly Zedillo's) campaign manager, complained about traditional PRI politicians who 'discarded the importance of public opinion polls, considering them a useless tool of technocracy, without understanding that there is no

¹¹³ Pollster Jorge Buendia (2010) also argues that there is still substantial variation in terms of individual candidates' use of private polling. While some candidates use polls to inform and develop their overall campaign strategies, many others merely use them to track voter intentions.

¹¹⁴ The firm was supported by the local firms *Pearson* and *Covarrubias y Asociados*, both specialists in quantitative and qualitative market- and opinion-research.

political party in the world [...] that does not shape its decisions according to the results from public opinion polls' (Moctezuma Barragán, cited in Rottingaus and Alberro, 2005).¹¹⁵ He also stated that the traditional wing of the party had ultimately become dominant and taken control of the Labastida campaign, displacing those who argued that polls should be the main form of campaign feedback.¹¹⁶ The use of surveys by the Cárdenas team in that election was not substantially different. Where Fox's campaign strategists drew heavily on polls to develop campaign messages targeted at specific demographic groups and undecided voters (Bucio and Gutiérrez, 2005), the PRD strategists, as in 1994, 'believed so firmly in their own ability to divine the pulse of the people that they criticized surveys as frivolous and refused to consult them on many occasions' (Greene, 2007: 238).

Cross-party differences in the use of polling to track voters' responses to campaign efforts were again evident in the 2006 presidential election campaign. At the start of the official campaign season, the majority of polls considered the PRD-led 'Coalition for the Good of All' candidate, Andrés Manuel López Obrador, to be the front-runner, with around a ten-point lead over Felipe Calderon, the PAN presidential nominee. López Obrador maintained this early advantage until late March, in spite of his rivals' campaign efforts. When confronted with this adverse situation, the Calderon camp proved highly responsive to both public and private internal polls that revealed that the initial campaign strategy launched on January 19, which sought to portray him as an honest, 'clean hands' candidate with 'courage and passion for Mexico', was not working as expected. As the candidate acknowledged in his campaign diary:

¹¹⁵ Initially, Labastida announced that he would be his own campaign manager; he later appointed Esteban Moctezuma, then removed him, replaced him, and finally added sub-coordinators responsible for different parts of the campaign (Bruhn, 2004: 144).

¹¹⁶ Pollster Paul Valdés (2009) also argued that some 'old-style' PRI leaders in charge of the Committee of Electoral Action also tended to question the usefulness of surveys, and preferred to rely on the information provided by the party's territorial structure and precinct-level historical results as their main source of voter feedback (personal interview).

the internal poll confirmed our concerns. We were losing strength, and the gap with the front-runner was already an eleven-point disadvantage. I met with my core team and asked them a full report of each of their areas. It was clear to me that I should turn the helm of the campaign. After a long and difficult evaluation session [...] we decided to review and re-launch the campaign (Calderón Hinojosa, 2006: 145-146; translation mine).

Soon after that meeting, Calderon made a number of important changes to his campaign team and strategy. In early March, he replaced Francisco Ortiz, the head of image and marketing of his campaign, with the Spanish consultant Antonio Sola. Like Fox, he also sought the advice of American consultants Dick Morris and Rob Allyn (Bruhn, 2009; Trejo Delarbre, 2010a). The importance of polling to Calderon's team again became evident when, in the middle of the crisis, Dick Morris suggested adopting 'crime' as the new campaign issue, while others in the team proposed campaigning on economic issues instead.

As the arguments on both sides were equally passionate, they agreed to conduct a poll [...] in order to determine which of the two issues was most important to citizens. It resulted in a document known as 'Adjusted Strategy', which made clear, once again, that they had to stick to the economy as their issue (Camarena and Zepeda Patterson, 2007: 114; translation mine).

As the research suggested, Calderon's strategists re-focused the campaign messages on economic issues such as employment and the relatively good macroeconomic performance and popularity of President Fox's administration, and portrayed the candidate as the 'President of Employment' (Black, 2006). Calderon's team also performed a major strategic shift in advertising tactics. On March 18, the PAN launched an intensive negative media campaign against López Obrador that painted him as a dangerous, intolerant, and economically incompetent populist who, if he were to win, would bankrupt the country. In this regard, the research also provided important guidance to Calderon's strategists by suggesting that they 'link Andrés Manuel López Obrador with the word 'Debt', not

'Crisis' as others had wanted, so the effect was stronger' (Camarena and Zepeda Patterson, 2007: 114; translation mine). Qualitative research also played an important role in the campaign strategy, since the negative – and positive – campaign ads on radio and TV were tested in focus groups and tailored to specific constituencies (McKinley, 2006).

One month after the shift in Calderon's communication strategy, most public polls showed that he was catching up to López Obrador, with a gap of less than 5 percent, which continued to narrow until early May, when the PAN's candidate appeared as the front-runner for the first time in the race. López Obrador's response to the decline in his poll ratings was particularly sluggish, even when his own private, internal polling data also confirmed that his support was dropping significantly (McKinley, 2006).¹¹⁷ López Obrador seemed so confident that he would overcome his opponents' negative campaigns, as he had in the past, that for around a month-and-a-half he did little else than simply deny the declining trend and question the reliability of unfavourable polls (the same polls that his team had accepted as valid just a couple of months before, when they still showed him ahead). His campaign manager, Jesus Ortega, 'dismissed polls showing López Obrador slipping into second place as propaganda created by Calderon' (Black, 2006). He also stated that

López Obrador won't change his strategy in response to Calderon's surge in the polls [...] [...] [He] plans to step up the number of days he holds rallies, meetings and factory tours to six days a week from five [...] We're maintaining the idea of a campaign that gives priority to direct contact with the people (Ortega, cited in Black, 2006).

Indeed López Obrador preferred to respond to his opponents' negative attacks in his speeches delivered at the rallies rather than through campaign ads (Ramos Pérez, 2006). It was not

¹¹⁷ Ana Cristina Covarrubias, López Obrador's pollster, conducted ten cross-sectional surveys during the legal campaign period (from January to June). After the campaign, she acknowledged that the surveys commissioned by her firm largely confirmed the steady decline in López Obrador's popularity shown by most public polls. According to her, López Obrador had a 14-point lead in January, and he still maintained a 10-point lead during February and March. However, his support gradually declined from April to June (Milenio, 2007). His own staff would also acknowledge that their internal polls showed that he fell behind Calderon in early May (McKinley, 2006).

until very late April – one month after the start of the PAN’s smear campaign – that Obrador’s team finally decided to adopt a defensive media strategy, and not until late May did it finally counterattack the PAN’s negative ads (Freidenberg and González, 2009). The PAN candidate and his team regarded polls and focus groups as valuable instruments for tracking voters’ responses to their campaign messages. This was reflected in major changes to Calderon’s image management, campaign staff, and strategy. As Black (2006) notes, ‘Calderon [...] responded to focus groups and polling data to re-position himself as a candidate who will create jobs’. In contrast, the low degree of responsiveness to the polls and the few and late adjustments to campaign strategy exhibited by López Obrador’s team suggest that sources other than modern research techniques shaped a number of their strategic campaign decisions.

Conclusion

Recent years have seen a number of major developments in campaign management, staffing, and research in Mexico. Here is a summary of these relevant campaign innovations:

- From 1994 to 2006 there was a shift from party-based to more party-distant models of campaign staffing and management, characterised by a clearer separation between parties’ and presidential candidates’ campaign organisations, the rise of autonomous campaign headquarters, and the increasing employment of non-party – many of them foreign – campaign professionals. It should be noted that, although national and local party organisations still play an important role in presidential campaigns, their degree of involvement in the candidates’ campaigns efforts varies considerably from party to party. The PAN candidates have, for example, been less dependent on their party’s organisational structures and resources in the running of their campaigns; they have been also more autonomous and disposed to look for external resources and expertise than their PRI and PRD counterparts.

- Despite important differences across parties and candidates, it can be argued that, from 2000 onwards, there was a general shift from short- to mid/long-term campaign preparations – which included poll- and media-driven campaign practices involving direct and indirect communication channels, such as paid advertising and news-management tactics – for building electoral support before the start of the legal campaign period. Some scholars and commentators even argue that modern elections are often won or lost even before the beginning of the legal campaign season. Indeed, Mexican competitive presidential elections have shown that candidates who seek media attention and build early support are usually better positioned in the polls at the start of the official campaign period than competitors who rely on short-term campaign preparations. However, this initial advantage may not be definitive: campaign dynamics during the official season matter as well.
- Although the use of modern survey research is now a pervasive feature of modern Mexican presidential campaigns, the extent of their integration within candidates' overall campaign strategies still varies markedly across parties. While polls and focus groups have consistently been the primary source of campaign feedback for the PAN's presidential candidates, for instance, with results being used to shape and guide their campaign tactics and strategies, their impact has been substantially more limited on the presidential campaigns of the PRI and the PRD.

8 Trends of Continuity and Change in Mexican Presidential Campaigns II: Campaign Communications

Introduction

Comparative research on campaign communication change reveals significant cross-country differences in the adoption and adaptation of political marketing strategies and campaign innovations initially developed in the U.S. (Fletcher, 1991; Bowler and Farrell, 1992a; Butler and Ranney, 1992; Swanson and Mancini, 1996b; Gunther and Mughan, 2000; Plasser and Plasser, 2002; Schafferer, 2006; Negrine et al., 2007). Most studies nevertheless acknowledge that some trends appear to be more or less worldwide, such as the increasing importance of the mass media during election campaigns, and particularly the ‘emergence of television as the preeminent medium of political communication and information’ (Gunther and Mughan, 2000: 9). Comparative studies that focus more specifically on political advertising also show that, although the extent to which broadcast media can be used for political advertising differs widely across countries, television plays a central role in campaign strategies implemented around the world (Kaid and Holtz-Bacha, 1995, 2006).

As with campaign modernisation trends in other latitudes, in Mexico television has become central to a number of activities and communications undertaken by campaign organisations, ranging from those efforts and messages that are largely under control of parties and candidates (i.e. direct or non-mediated campaign communications channels), to communication actions which are not directly controlled by them, but conveyed through news-media organisations (i.e. indirect or mediated campaign communications channels). In this chapter, I will review a number of professional developments in direct and indirect campaign communications introduced in the last three presidential elections.

Direct campaign communications involving the intensive use of paid political advertising in electronic media are among the major features of the professionalisation of Mexican campaign

practices in both presidential and congressional elections (Lozano, 2006). From 1997 to 2006, candidates for executive posts of all major parties spent most of their campaign budgets on mass-media appeals that focused on advertising spots in radio and television (see Chapter 6). The growing importance of the media is evident in professionalisation trends through direct and indirect campaign communications channels employed to influence news media coverage ('news media management'). Although the electoral efficacy of modern, media-based campaign techniques and strategies is often a matter of debate among scholars and commentators, numerous studies on voting behaviour demonstrate that (alongside social networks and other secondary organisations) the media play an increasingly important role as electoral intermediaries between Mexican parties and voters (Lawson, 1999; Moreno, 1999; Poiré, 1999; Lawson, 2002; Moreno, 2002b; Lawson, 2004a:b; Moreno, 2004; Lawson and McCann, 2005; Beltrán, 2007; Valenzuela and McCombs, 2007; Flores-Macías, 2009; Greene, 2009; Moreno, 2009b:a; Valdivia and Beltrán, 2009).

However, despite their current and growing importance, even as late as the mid-1990s media appeals had little relevance for parties' and candidates' electoral strategies, and this was not due to the lack of a communications infrastructure. Even though television had achieved a significant degree of penetration across the country, and was the most important source of political information for the majority of Mexicans, the broadcast media remained largely unused by individual candidates seeking executive and legislative elected public positions as an instrument to convey political messages until the late-1990s. Opposition parties' limited resources and media access made it practically impossible for them to adopt professionalised, media-intensive campaign innovations. Instead, their candidates primarily took their campaign messages directly to the public through people-intensive communication channels even as late as the mid-1990s. The PRI presidential campaigns were not substantially more media-oriented either. Regardless of its massive incumbency advantages in terms of campaign resources and media access, the PRI presidential hopefuls also

relied heavily on traditional, grassroots, retail politics and face-to-face communication channels, such as whistle-stop tours and rallies, for getting out their campaign messages.

The emergence and gradual penetration of radio and television allowed the PRI candidates to reach a larger number of voters, contributing to the nationalisation of the presidential campaign. However, it is important to note that during this pre-modern stage of Mexican campaigning, the dominant party had no explicit direct media strategy to promote either the party label or candidates' images among voters during election campaigns (like, for example, the sort of paid campaign ads used in the U.S.) (Langston and Benton, 2009). Instead, the PRI's direct campaign communications took the form of paid spots extolling the federal government's achievements in office – perhaps seeking to activate voters' positive retrospective evaluations (Langston and Benton, 2009). However, most of the PRI's candidates' campaign communications during the pre-modern period relied primarily on indirect channels, such as *Televisa*'s prime-time nightly newscasts. The PRI regime had such control over the media agenda that professional news management and political advertising techniques were largely unnecessary (see Chapter 5).

Television news programs provided extensive – almost ritualistic – coverage of their campaign events and activities, as well as publishing only favourable news stories, commentaries, and interviews, all of them intended to convey the image of a wise, powerful, and competent leader (Adler, 1993; Hallin, 1994; Hughes, 2006; Lomnitz et al., 2010) (see Chapter 5). Clearly, indirect media appeals played an important role in the image-building of the PRI's presidential nominees. Nevertheless, they supplemented, rather than displaced, traditional electoral mobilisation tactics, which remained the predominant component of presidential campaigns for most of the 20th century. It was not until the 1994 campaign of Ernesto Zedillo that the dominant party systematically adopted a more professionalised campaigning model, characterised by media-oriented and survey-based message development. Opposition parties, on the other hand, had adopted media-based campaign

practices more thoroughly before the late 1990s, but only after economic and political reforms had levelled the electoral and the media arenas to a significant degree.

Direct Campaign Communication Channels

Political advertising

Campaign organisations have two avenues of access to the media. One is via *direct* (also called *controlled*) *campaign communication channels*, through which they can control the output of their messages. In some countries, such as the U.S., parties and/or candidates are allowed to purchase air time on radio and television in order to disseminate their campaign messages directly to the electorate. In others, such as Brazil, Chile, and the UK, paid political advertising is not allowed; thus, direct messages are broadcasted through free, state-provided air time. Some other countries, like Mexico (until 2007), provide free air time to parties, and also permit paid advertising. Paid political advertising was used for the first time in systematic fashion in the 1994 presidential election. However, the only party that made intensive use of paid media appeals was the dominant party. Unlike previous PRI presidential candidates, Zedillo's campaign was more capital-intensive, and primarily media-oriented (Pichardo, 2001; Solis Camara, 1995). Zedillo's team put a lot of effort into producing high-quality spots for radio and television, and developing news-management strategies aimed to portray him as the most experienced, better prepared, and competent candidate. His direct and indirect campaign communications focused heavily on policy over character (Pichardo Pagaza, 2001, 2010). It is also important to note that, in contrast to subsequent presidential elections, paid media appeals in 1994 were predominantly positive instead of negative; policy- rather than personality-centred.

Despite some moderate increases in public funding during the early 1990s (see Chapter 6), the lack of financial resources and limited media access still put substantial obstacles in the way of adopting media-centred campaign tactics by the PAN and PRD presidential nominees in 1994 (see Chapter 5). When questioned by a journalist from the American news network C-SPAN on how the

PAN was getting its campaign message across to voters in that election, the party president, Carlos Castillo Peraza, acknowledged that, due to the party's financial constraints, campaigning was primarily through labour-intensive tactics (door-to-door canvassing, rallies, etc.), posters, billboards, other kinds of printed propaganda, radio, and 'a little bit of television [advertising]' (Castillo Peraza, 1994). Indeed, regardless of its limited resources, the PAN's campaign was to some extent more sophisticated and media-oriented than the PRD's.

Media spending by the PAN amounted to 36 percent of its total campaign disbursements (46.8 million pesos), compared to only 2 percent of the PRD's budget (0.8 million pesos). However, in the end, both parties fell far below the PRI's media spending in that election (171.5 million pesos) (see Chapter 6). The high importance assigned to the media by the PAN was also reflected in the preparation of Diego Fernandez de Ceballos for the nation's first televised debate. His campaign team spent several weeks researching the opposition, gathering and preparing evidence, compiling materials and figures for the debate, and analysing debate strategies used in the U.S., England, and France (Shirk, 2005). By contrast, the campaign communication and mobilisation methods of the left party remained essentially unchanged from the 1988 presidential race. PRD leaders and activists believed that the main electoral strength of the party relied on the impressive grassroots mobilisation capacity of the *neocardenismo* as a social movement.

The rise of electoral commercial competition and press freedom during the first half of the 1990s, and following the 1996 electoral reform, helped homogenise the presidential campaigns of all parties, rendering them much more capital- and media-intensive than before. A number of media-centric campaign developments took place in the 1997 mid-term congressional elections, and were developed further in the presidential elections of 2000 and 2006. However, no other party ran more media-oriented campaigns than the PAN in both elections. It must be noted, nevertheless, that the PRI's media spending in national TV networks in 2000 and 2006 was still higher than the media expenditures of any other party or coalition (see Chapter 6). Consequently, it had more paid media

time than the PAN and the PRD in both races – particularly in 2000, when the still-ruling party spent more than the PAN and the PRD together (see Table 20). Despite this, the paid media appeals of Fox and Calderon exhibited, in general, better media placement, timing, and targeting than those of either the PRI or the PRD. They were also more fully integrated within the candidates' respective campaign strategies than those of their rivals (Flores Rico, 2000; Bruhn, 2004; Moreno, 2004; Freidenberg and González, 2009; Trejo Delarbre, 2010a). In the 2000 elections, for instance, the campaign spots of the PAN presidential candidate not only had a more continuous presence in the media throughout the pre-campaign and legal-campaign periods than his rivals' (the campaigns of the PRI and PRD candidates started considerably later in the media), but his ads were, generally, more creative and less costly, and had more variety, rating, and impact than those of Labastida and Cárdenas (Flores Rico, 2000).¹¹⁸

Table 20 Total Paid Television Air Time in National Networks in the 2000 and 2006 Presidential Elections by Party (%)

	2000	2006
PAN	19.5	35.7
PRI	50	32.6
PRD	27	27
Other	3.4	4.7
<i>Total</i>	<i>100 (21 hours, 31 min)</i>	<i>100 (110 hours)</i>

Source: 2000: Trejo (2001); figures are reported for two main national networks (Channels 2 and 13), with data from *Reforma monitoring*. 2006: Trejo (2010); figures are reported for the main five national networks, with data from the *IFE monitoring*.

¹¹⁸ The Fox campaign produced almost 60 different television spots, many of them negative, which were tested in focus groups and targeted at diverse electoral segments (Korrodi cited in Trejo Delarbre, 2001).

The PAN also carried out a superior media campaign six years later. Unlike in 2000, when PRI advertising amounted to half of the total paid television air time,¹¹⁹ in 2006 the three parties advertised roughly equally on national television networks (see Table 20).¹²⁰ Nonetheless, the PAN and the PRI had more – and a more continuous – presence on the media throughout the legal campaign period than the PRD-led coalition. Moreover, the PAN focused more on voters watching prime-time than its rivals. While the PRI's and the PRD's spending on prime-time amounted to around half of their respective total television outlays, 63 percent of the PAN's television spending went on a prime-time slot. As a result, the PAN's paid ads amounted to 42 percent of the total prime-time paid political advertising airtime during the campaign, thus reaching a wider audience (see Table 21). Calderon also bested his rivals in the quality, creativity, and memorability of his commercials.¹²¹

Table 21 Paid Television Air Time in the 2006 Presidential Election by Party (%)

	<i>Total time (including national and local networks)</i>	<i>Five national networks</i>	
		<i>Regular time</i>	<i>Prime-time</i>
PAN	26.6	29.2	41.5
PRI	43.7	39.3	27.1
PRD	20.6	28.4	25.1
Other	9	3.2	6.3
<i>Total</i>	<i>100 (841 hours)</i>	<i>100 (50 hours, 14 min)</i>	<i>100 (60 hours, 27 min)</i>

Source: Trejo (2010), with data from the *IFE* monitoring.

¹¹⁹ According to Moreno (2004: 253), the PRI out-advertised the PAN and the PRD and, in some weeks near to the end of the campaign, Labastida had even more paid advertising than Fox and Cardenas together.

¹²⁰ The formerly dominant party, the PRI, still had more TV advertising time, but most of its television spending was done at the local level (see Table 21).

¹²¹ A number of content analyses show that the Calderon spots seem to have been more memorable, and generally exhibited better quality than those of his rivals; although some of López Obrador's announcements were also memorable, slick, and professionally produced, many of them were far less sophisticated (Lawson and Gisselquist, 2006; Freidenberg and González, 2009).

The strategic differences that separated the PAN from the PRD campaigns were clearly reflected in their candidates' privileged avenues of campaign communication, and particularly in the importance they assigned to mediated communication channels. The Calderon campaign relied heavily on media-based appeals as its primary way to reach voters. By contrast, and '[d]espite the failings of Cárdenas' three presidential campaigns, López Obrador announced in late 2005 that his campaign would be *a ras de suelo*, meaning a ground-based event tour that would not put so much emphasis on media advertising [since] this campaign style would bring him close to the people' (Langston and Benton, 2009: 148). Obrador even stated: 'I will be the first candidate to win without using television' (Camacho Guzmán and Almazán, 2006: 17). Accordingly, during the first months of his campaign he focused almost exclusively on direct, people-intensive channels, such as speeches given at campaign rallies, and made little use of direct or indirect media appeals (Pliego Carrasco, 2007). In fact, when the PAN launched a negative media campaign against him, for almost one month he preferred to defend himself in this way, instead of by means of paid ads. Unfortunately, his campaign strategy 'at the ground level' proved very ineffective in counteracting his rivals' media attacks. It was not until a late stage in the election that he turned to concentrate on the media campaign (Freidenberg and González, 2009).

Media/campaign strategies and tactics

Negativity

Despite being a widely criticised electoral tactic, negative campaigns are now part of the arsenal of campaign strategies and styles carried out by Mexican party and campaign organisations. In the presidential campaigns of 2000 and 2006, radio and television airwaves were not only filled by ads extolling candidates' virtues and promises, but also ones attacking their opponents (Lawson and Gisselquist, 2006; Lozano, 2006; Beltrán, 2007; Freidenberg and González, 2009; Moreno, 2009b:a). However, to what extent is negativity a *new* feature of modern Mexican campaigning? Certainly, opposition parties heavily questioned and condemned the PRI regime during the 1988 and 1994

election campaigns. Most of their attacks were, nevertheless, severely restricted by the type of people-intensive campaign practices used by their candidates. Changes in the media system and the regulatory framework of campaigns, leading to the rise of media-centred political competition, gave opposition parties the chance to appeal to a much larger audience, and greatly enhanced the effectiveness of their attacks on the PRI regime. This became evident in the 1997 mid-term elections.

Negativity was frequent in a wide range of political communications during the 2000 presidential election, with attacks on candidates' events and appearances, speeches, news coverage (Lozano, 2001; Mendé Fernandez, 2003; Lawson, 2004b; Moreno, 2004; Lawson and McCann, 2005), debates (Bruhn, 2004; Lawson, 2004a; Shirk, 2005), and political advertising (Moreno, 2004). Actually, all leading candidates used attack-based advertising tactics in that election. Fox and Cárdenas ran predominantly negative media campaigns, unlike Labastida. According to Moreno's analysis (2004), Fox's campaign was substantially more negative in tone than Labastida's for at least five of the six months of the legal campaign period (January-June).¹²² With the exception of April and the last weeks of the campaign, Fox's negative attacks on the PRI-regime and its candidate amounted to around half of the PAN's total paid TV advertising time. Moreover, in some weeks of the campaign, the PAN's negative ads peaked to around 90 percent of the total paid TV advertising time. In contrast, the campaign of the PRI nominee remained essentially positive, running predominantly issue-based appeals during the first four months of the race, and it was not until May that it went negative. Even still, with the exception of a single week in May and the last weeks of the campaign, the relative load of negativity of Labastida's campaign remained below 40 percent of its total advertising time (Moreno, 2004).

Negative persuasive messages were also a prominent campaign tactic in the 2006 presidential election. However, whereas in 2000 *Reforma* conducted daily monitoring, the available

¹²² The study draws on the monitoring of political advertising on Mexico City-based television networks conducted by the *Reforma* newspaper.

analyses on political advertising in 2006 only focused on the ads' content, regardless of how many times they were broadcasted (Lawson and Gisselquist, 2006; Paiva, 2008; Freidenberg and González, 2009). Thus, it is not possible to compare negativity trends between both elections. However, analyses show that, although Calderón's campaign was considered more negative, the proportion of negative ads produced by both candidates' teams was quite similar (39 percent of Calderón's, compared to 36.5 percent of López Obrador's).¹²³ Equally, they also show that, contrary to the public's general impression, most of Calderón's and López Obrador's spots were, in fact, positive appeals (61 percent, compared to 63.5 percent) (Paiva, 2008).¹²⁴

Certainly, negative campaigns played a major role in the leading presidential candidates' campaign strategies in the 2000 and the 2006 elections (Moreno, 2004; Freidenberg and González, 2009; Greene, 2009; Moreno, 2009a). All three parties chose to go negative, but none did so as quickly, intensively, and effectively as the PAN. The negative approach of the centre-right party proved to be an effective campaign tactic in both races (Moreno, 2004; Greene, 2009; Moreno, 2009a). Alongside other relevant factors, Fox's negative attacks on the PRI-regime and its candidate effectively framed the 2000 election as a choice between an unbearable, corrupt, and authoritarian status quo, and much-needed democratic change. Six years later, the PAN's intensely negative campaign against López Obrador was crucial in setting up a contest between a dangerous future of irresponsible economic management and debt, and one promising employment, economic stability, and growth.

¹²³ Assessments of negativity vary across studies (perhaps due to the different coding procedures and datasets employed). For instance, Lawson and Gisselquist (2006) suggest that López Obrador's ads were actually more negative than Calderón's spots (44 percent compared to 37 percent) and, although the PAN nominee's campaign was essentially seen as relying on fear, the two candidates relied on 'fear' in roughly equal percentages (33 percent, compared to 35 percent) (Lawson and Gisselquist, 2006).

¹²⁴ Lawson and Gisselquist's (2006) content analysis also echoes these findings.

Both election campaigns have taught leading candidates important lessons: particularly that timing is a crucial issue when deciding to ‘go negative’. In both races, challengers (Fox in 2000 and Calderon in 2006) who went negative early enough in the campaign were able to reduce the front-runners’ early advantage quite markedly. On the other hand, front-runners who responded to their rivals’ attacks fairly late in the campaign, such as Labastida in 2000 and López Obrador in 2006, were unable to recover most of the lost ground. Recalling the PRI candidate’s campaign in 2000, it was not until late April that López Obrador’s team finally acknowledged the need to respond to the PAN’s smear campaign, after nearly a month-and-a-half of continuous and heavy attacks by his rivals. A number of analyses provide evidence that this delayed response gave the PAN candidate an uncontested field during a critical – and probably decisive – period (Bruhn, 2009; Freidenberg and González, 2009; Greene, 2009; Moreno, 2009a). However, due to the conflict that followed the presidential election of 2006, a new electoral reform passed in 2007-8 prohibited negative campaigning and attack advertising in the mass media, which reduced their effectiveness significantly.

Indirect Campaign Communication Channels

Media and image management

As alternatives to direct communication channels, campaign organisations may also reach voters through *indirect*, also known as *uncontrolled, campaign communications channels*, such as the free coverage of campaign activities provided by the broadcast and print news media organisations. As discussed in Chapter 5, government control of the media rendered news management largely irrelevant during most of the authoritarian period. However, some media-management and permanent campaigning techniques involving survey-based message development emerged during the administration of President Carlos Salinas (Moreno, 1996). In spite of the lack of analyses on the effects that such media campaigns and techniques had on public opinion and voting behaviour, some authors argue that ‘together with expert image management on the part of the president’s staff,

careful media framing of key events successfully conveyed the impression of rapid social and economic progress [and]... contributed to a sweeping PRI victory in the 1991 legislative by-elections and a solid PRI win in the 1994 presidential contest' (Lawson, 2002: 54). It should be noted, though, that such 'news management' tactics took place in a media environment still characterised by a number of authoritarian government control mechanisms limiting media autonomy. Hence, it would be quite reasonable to argue that such mechanisms were behind these tactics' tremendous success in influencing media content and public opinion. Survey-based message development and media-management tactics were also used during the 1994 presidential election, by the PRI presidential candidate, albeit to a moderate extent. Zedillo and his team were fully convinced that the media would play a key role in the election; thus, the candidate's campaign communications, including speeches, interviews, press conferences, etc., were tailored for the mass media (Pichardo Pagaza, 2001, 2009). The PAN candidate, Diego Fernandez, also made limited use of news-management techniques.

In contrast, the PRD candidate, Cuauhtémoc Cárdenas, largely ignored the media as an instrument for reaching voters. His media coordinator tried to persuade him to adopt professionalised news-management and spin-control techniques, similar to the ones developed in the U.S. and in other Latin American countries.¹²⁵ However, Cárdenas disliked the American campaigning style. He felt uncomfortable in front of television cameras, and was also reluctant to take intensive media-training. 'He particularly saw the [U.S.] electoral process as a circus spectacle, and most candidates as meek puppets of marketing and the media' (Aguilar Zinser, 1995: 193-194). In fact, many of his close aides and advisors considered that his image and sombre personality were not well-suited to television (Aguilar Zinser, 1995). Unsurprisingly, his performances in most of his few media appearances – including the nation's first live televised debate – were lacklustre. Zedillo

¹²⁵ Zinser suggested that Cardenas establish a central rapid rebuttal campaign unit to counteract the intense negative propaganda directed against him and his party during the Salinas administration.

was not a much more telegenic candidate. Even though he performed slightly better than Cárdenas in the debate, he was also clearly beaten by the more charismatic, fluent, and aggressive Diego Fernández.

Nonetheless, unlike Cárdenas, Zedillo's team adjusted their campaign strategy after losing the debate. They focused more intensively on the media campaign, rather than on the PRI's traditional presidential campaign tactics, such as state visits and meetings with the IEPES (Pichardo Pagaza, 2001). Although Zedillo did not stop touring the federal states, his team directed considerably more attention than his rivals to the media-oriented aspects of the campaign, such as tailoring his speeches and policy proposals to suit television formats. Cárdenas did exactly the opposite. He intensified his visits to and rallies in small towns and avoided media appearances (more than 900) (Aguilar Zinser, 1995; Calderón and Cazés, 1996).

Six years later, in the 2000 elections, the Mexican media environment had become much more complex than ever before. It was transformed dramatically during the 1990s (Lawson, 2002), from an authoritarian to a hybrid media system exhibiting competing civic, authoritarian, and market-oriented models of newsmaking (Hughes, 2006). Print and broadcast media at the national level were more autonomous, open, and representative of Mexicans' electoral pluralism than in the 1994 presidential election. Asymmetries in campaign coverage reduced significantly in the late 1990s, and a number of infotainment trends clearly emerged during the same period (see Chapter 5). In consequence, the PRI-regime could no longer rely on the 'cooperation' of the national broadcast media to provide biased and lavish coverage of its campaign activities. Thus, the importance of image and media management, spin control, and other media-based campaign practices grew significantly for all leading parties (the PRI included).

A number of studies show that media coverage was, in general, quite balanced in 2000 (see Chapter 5). Besides intensive, paid media appeals, all major parties carried out important media-management efforts in order to influence news coverage during the election campaign, but no other

party did it as well as the PAN. Based on the monitoring data provided by the *IFE*, Flores Rico (2000) shows that, while the PRI managed to attract more news media attention than the PAN in states characterised by PRI governors' authoritarian media controls, the PAN enjoyed more coverage in the national broadcast media. This suggests that the PRI had more difficulty in influencing news-media coverage conducted by national TV outlets and Mexico City-based (but with a national audience reach) radio stations. His analysis also suggests that this was largely because Fox's campaign team had more experts in image and media management than the Labastida camp (Flores Rico, 2000). The monitoring conducted by the *Reforma* newspapers echoes this finding, and shows that Vicente Fox had more free air time in television and, especially, radio, than any other candidate (41 percent for Fox, 34 percent for Labastida, and 28 percent for Cárdenas). However, the tone of such coverage was slightly biased towards the PRI candidate.

Major changes in the structure and behaviour of the Mexican electorate during the 1990s (dealignment) also made it more necessary than ever for all leading candidates to appeal to voters outside their parties' traditional support base via the mass media. However, the predominant assumption inside Labastida's team was that the mobilisation of the party's base would be almost sufficient to win the election. In fact, as Bruhn notes, a number of the formerly dominant party's strategic choices during the candidate selection and campaigning processes reflected the underlying assumptions and attitudes of the more traditional party elites and strategists, who still regarded the PRI 'as the "main-stream" – the party of a Mexican majority, whose most important electoral task is holding its own base rather than reaching out to new territory' (Bruhn, 2004: 126). Unsurprisingly, most adjustments to Labastida's campaign strategy were oriented towards seeking more involvement and cooperation of local party bosses (usually PRI governors) and their party machines in his campaign, as well as to privileging more traditional electoral mobilisation practices over modern, media-oriented campaign tactics and strategies (Flores Rico, 2000; Nájar, 2000; Bucio and Gutiérrez, 2005).

For instance, some campaign staffers complained that the candidate's campaign events and appearances planned by the more traditional members of his team often contradicted the initial communications strategy, which sought to portray the PRI as a renewed, less corrupt, and more democratic party. According to these critics, Labastida often showed himself in public with prominent local PRI bosses, even if they had a bad image among the electorate at large (Bucio and Gutiérrez, 2005). Such appearances, and the negative media coverage of them, did not convey the message of 'a new PRI, closer to you', but damaged the candidate's image, and suggested party continuity rather than change. Generally, as we have seen, the campaigns of the PAN candidates exhibited superior media management than those of their PRI and PRD rivals. Indeed, the PRD candidates made little effort to adopt professional media management advice and techniques in a more systematic fashion. The campaign of López Obrador in 2006 exhibited the reductive techniques of his predecessor's poor media management.

Direct-marketing techniques

Direct-marketing techniques are becoming an increasingly important component of modern, professionalised campaigns worldwide, since they provide campaign organisations (parties and candidates) with the potential to reach voters directly. They include 'direct mail, direct email, direct texts and any other form of communication that is sent directly to the individual' (for instance, telemarketing) (Lees-Marshment, 2009: 167). In Mexico, however, the broadcast media still remain far more important than direct-marketing and web-based campaign channels in getting political messages across to the electorate. Mexican parties and candidates still put more faith in radio, television and grassroots mobilisation than in such techniques (Bucio and Gutiérrez, 2005). It should

be noted, though, that they are increasingly used not only in presidential campaigns, but also in congressional races.¹²⁶

Direct mail

In 1994, all major parties engaged in direct-marketing activities/used the mail to appeal to voters. The PRI perhaps made a more intensive use of this communication technique, not just in paper form but also through campaign video-tapes (Pichardo Pagaza, 2001; García Calderón and Figueiras Tapia, 2006). Survey data show that 39 percent of citizens were contacted by the PRI, 25 percent by the PAN, and 12 percent by the PRD. Direct-mail contact increased in 2000; the PRI remained the party that reached more citizens via this technique (48 percent), followed by the PAN (32 percent), and the PRD (22 percent) (see Table 22). It is important to note that Fox's team used direct-marketing techniques (direct mail and email) not only during the election campaign, but also in the pre-campaign period as part of his continuous campaign strategy (Cantú, 2001).

Table 22 Political Parties' Direct Mailings by Party ID, 1994 and 2000 (%)

Party ID/Year	PRI		PAN		PRD	
	1994	2000	1994	2000	1994	2000
PRI ID	40.0	49.1	33.6	25.9	10.9	14.9
PAN ID	39.9	49.2	24.0	36.2	11.3	20.8
PRD ID	40.2	46.3	21.3	31.4	22.0	41.3
Independents	40.6	47.8	22.0	33.0	12.2	23.8
All	39.4	48.3	24.6	31.9	12.1	22.1

Sources: The 1994 data are taken from the Office of the Technical Advisor to the Presidency/President of Mexico, Post-electoral poll (September). Question asked: 'Tell me if, in the last election campaign, you received propaganda or mailings at your home from any political party'. The 2000 data are taken from the Mexico 2000 Panel Study, post-electoral, cross-sectional component. Question asked: 'In the last few weeks of the campaign, did you receive propaganda or mailings at your home from any political party or presidential candidate?'

¹²⁶ For instance, federal deputy María Elena Pérez de Tejada stated that she and other PAN congressional candidates used phone banks extensively in their campaigns.

Campaign organisations usually concentrate their direct-contact efforts on undecided, swing, and independent voters. Alternatively, they may focus on mobilising their core or traditional supporters (Baines, 1999, in Lees-Marshment, 2009). This kind of mobilisation approach may be particularly appropriate for parties with a large number of loyal partisans, such as the hegemonic PRI. Survey data do suggest that Mexican parties and candidates tended to follow a looser, catch-all, direct-contact strategy, seeking to mobilise similar support across all categories of voters, in the 1994 and 2000 presidential elections. With the exception of the PRD in 2000, all leading parties targeted their own and their rivals' strong and weak identifiers, rather than specific groups of voters (see Table 23). Similarly, Buendia and Somuano (2003) note that in 2000, all major parties concentrated their mailing efforts on those constituents who were most likely to vote (those more affluent and with greater political sophistication), but targeted all kinds of voter groups as well.¹²⁷ Of course, this raises doubts about the extent of the use of databases to target relevant electoral segments.

Table 23 Presidential Candidates' Direct Mail by Party ID in 2000 (%)

	<i>Francisco Labastida</i>	<i>Vicente Fox</i>	<i>Cuauhtémoc Cárdenas</i>
Strong PRI ID	27.2	7.4	4.9
Weak PRI ID	22.5	18.8	8.8
Lean to PRI	12.5	9.4	9.4
Strong PAN ID	29.6	27.2	13.6
Weak PAN ID	29.1	17.4	11.2
Lean to PAN	21.8	17.3	10.9
Strong PRD ID	23.8	16.7	21.4
Weak PRD ID	22.4	14.5	19.7
Lean to PRD	34.6	23.1	23.1
Independent	14	10.7	8.3
<i>All</i>	23.9	15.9	11.1

Source: Mexico 2000 Panel Study, post-electoral, cross-sectional component. Question asked: 'In the last few weeks of the campaign, did you receive propaganda or mailings at your home from any political party or presidential candidate?'

¹²⁷ While three of every ten individuals in the lowest category of political sophistication were contacted through this technique, almost seven of every ten in the highest category received a letter (Buendia and Somuano, 2001).

Internet-based techniques and new technologies

Television advertising and direct contact channels have been supplemented in recent years by new web-based technologies. All leading parties since 2000 – but mainly the PAN – have used the web as a way of reaching voters. In the 2000 presidential election, all major presidential campaigns operated websites. The Fox's campaign had a particularly impressive one loaded down with the candidate's biographical data and campaign diaries, videos of Fox's television spots, daily policy and press releases, weekly campaign summaries, interactive chat-room sessions with the candidate, among other relevant campaign information. Labastida's campaign also developed a comprehensive website. While the campaigns of Fox and Labastida made extensive use of internet-based campaigning tools, the Cárdenas' campaign employed them in a more limited way (Wallis, 2001, 2003; Bucio and Gutiérrez, 2005).

Online campaigning channels became even more relevant in the 2006 elections. Both top contenders, Calderón and López Obrador, developed campaign websites, and widely used the e-mail as a campaigning tool. However, Calderón devoted more money and resources to internet advertising than any other candidate (Politics Online, 2006). His spokesman, Arturo Sarukhan, stated '[o]ur war room believes it is a crucial vote-winning tool' (Taipei Times/AP, 2006: 7). Calderón's website allowed his supporters to read his campaign speeches, view photos from campaign events, answer online polls, send an e-mail or a SMS message to the candidate, communicate with each other via chat rooms, donating online, and even play some games (Politics Online, 2006). His team also used attack e-mails intensively as part of its smear campaign against López Obrador. 'The negative e-mails support[ed] Calderon's radio and TV campaign [...] Many of the e-mail messages forwarded again and again by Calderon supporters call[ed] Lopez Obrador a corrupt demagogue and a danger to Mexico' (Taipei Times/AP, 2006: 7). López Obrador's team responded with its own e-mail campaign. However, it reached out to less voters than the one launched by Calderón's camp. According to a poll conducted by the firm *Consulta Mitofski*, from the 8 percent of people that

received political e-mails during the campaign, 45 percent of them got messages supporting Felipe Calderón, and only 12 percent received e-mails backing AMLO. On the other hand, 32 percent of respondents said they received messages attacking López Obrador, and only 5 percent got negative e-mails against Calderón (Campos, 2006). In general, the Lopez Obrador campaign made a less efficient utilisation of internet-based techniques than Calderón's. The PRI candidate, Roberto Madrazo, also mounted its own campaign website, but it was not as elaborate or engaging as those of his two closest competitors (Politics Online, 2006).

As in most Latin American countries, Internet access in Mexico is growing rapidly, but is still comparatively limited when compared to the U.S. and Western Europe. This renders political Internet use an increasingly important but still developing aspect of politico-electoral competition. Although recent limitations established by the 2007-2008 electoral reform regarding the purchasing and content of political advertising in electronic media, and the reduction of public financing for election campaigns, have led some analysts to argue that candidates would begin to use the Internet more intensively, in fact their use of the medium remains quite limited compared to the U.S. context. Although in the 2009 mid-term congressional election campaign, parties made a greater and more sophisticated use of the Internet, including websites, blogs, social networks, etc., than in previous races, the still restricted access of the population to the web continues to prevent parties and candidates from using it more effectively. This is unlike in the U.S., where widespread access to the Internet means that it plays an increasingly important role, not only as an effective way to communicate political messages, but also in conducting activities relating to the financing of campaigns.

Conclusion

Index of professionalised campaigning

Following previous studies on the professionalisation of campaigns in Western Europe (Gibson and Römmele, 2009; Strömbäck, 2009; Moring et al., 2011) and Latin America (da Rocha Neto, 2007), I have developed a professionalised campaigning index (CAMPROMF) that builds on these works, but is adapted to the specific Mexican context. The index focuses on the three key dimensions of the campaigning process examined in this chapter and the previous one: management, research, and communications. The three components of the index have a similar weight. However, the communication component is slightly more prominent since it has five items. The research and organisation dimensions have 4 and 3 items respectively.

The data used to assign scores were mainly obtained through the detailed narratives of changes in presidential campaigning of the three leading parties, secondary literature, and a series of semi-structured interviews with a number of party officials, pollsters, and consultants. Additionally, the data collected through the narratives, secondary literature, and interviews were complemented by media reports on campaign strategy on the various aspects covered by the study, online news sources, party-produced information, and judgmental coding. The index comprises twelve items: (1) use of telemarketing; (2) use of direct mail; (3) use of outside political/media consultants; (4) use of opinion polling; (5) use of focus groups; (6) research of own campaign; (7) opposition research; (8) internet-based campaign techniques (interactive website/e-mail); (9) paid advertising; (10) news management; (11) continuous campaigning; (12) separate campaign team. Up to three points can be assigned to each item, ranging from 0 (no use) to 3 (extensive use). The more a campaign engaged or made use of these techniques/developments, the more professionalised it was considered to be. Thus, a fully professionalised campaign would have a score of 36 points (for a full description on the coding procedures, see Appendix A).

Table 24 presents the scores of the CAMPROF index by party from 1988 to 2006. This index will be used in the next chapter for carrying out a qualitative, multivariate analysis on the factors that have influenced the professionalisation of Mexican campaigns during the analysed period. The index scores show substantial cross-time and cross-party variation in the extent of parties' adoption of professional campaign innovations during the analysed period. In 1988, for instance, the index scores show that all leading candidates ran non-professionalised campaigns. Six years later, the degree of professionalisation of Mexican presidential campaigns remained quite limited. The index scores indicate that the one party to conduct a highly professionalised presidential campaign in that election was the PRI. By contrast, the PAN campaign exhibited a low level of professionalisation, and the PRD candidate ran, as in 1998, a labour-intensive, non-professionalised campaign.

In the 2000 and the 2006 elections the index scores increased markedly for all parties. Nevertheless, the party that performed best in the index was the PAN, followed by the PRI. The impressive increase in the PAN's score, from 9 points in 1994 to 33 points in 2000, reflects a major change in the campaigning style of the centre-right party towards a high level of professionalisation. In the case of the PRI, the score suggests a relatively high level of professionalisation. The score for the PRD also grew significantly from 1994 to 2000, which indicates a move from labour- to capital-intensive and media-oriented campaign practices. Nevertheless, the low score (16) still suggests a rather minor degree of professionalisation. The 2006 index scores show that all parties ran predominantly professionalised presidential campaigns. The PAN again ranked first in its use of professionalised campaign techniques. The scores of the PRI and the PRD suggest a medium-high level of campaign professionalism.

Table 24 Professionalised Campaigning Index Scores by Party (1988-2006)

Campaign item	1988			1994			2000			2006		
	PRI	PAN	FDN	PRI	PAN	PRD	PRI	PAN	PRD	PRI	PAN	PRD
Telemarketing	0	0	0	0	0	0	1	1	1	2	2	2
Direct mail	0	0	0	3	2	1	3	3	2	3	3	2
Political/media consultants	0	0	0	2	0	0	2	3	1	2	3	2
Opinion polling	1	0	0	3	1	0	2	3	1	2	3	2
Focus groups	0	0	0	3	1	0	2	3	1	2	3	2
Research of own campaign	0	0	0	2	1	0	3	3	1	2	3	2
Opposition research	0	0	0	1	1	0	2	2	1	2	3	2
Interactive website/E-mail	0	0	0	0	0	0	3	3	2	2	3	3
Paid advertising	0	0	0	2	1	0	3	3	2	2	3	2
Media management	0	0	0	2	1	0	2	3	1	1	3	1
Continuous campaigning	0	0	0	0	0	0	1	3	1	1	1	2
Separate campaign team	0	0	0	2	1	1	2	3	2	2	2	2
<i>Total score</i>	<i>1</i>	<i>0</i>	<i>0</i>	<i>20</i>	<i>9</i>	<i>2</i>	<i>26</i>	<i>33</i>	<i>16</i>	<i>23</i>	<i>32</i>	<i>24</i>

Note: 0 = no use or almost no use; 1 = low use; 2 = relative often/frequent use; 3 = extensive use

9 Pathways to Campaign Professionalisation: QCA Analysis

Introduction

This chapter provides a systematic assessment of the professionalisation of Mexican parties by using fuzzy-set Qualitative Comparative Analysis (fsQCA). It seeks to explain why Mexican parties succeeded or failed to adopt professionalised campaigning in the last four presidential elections. Initially introduced by Charles Ragin in 1987, QCA techniques have developed rapidly ever since (Ragin, 1994; Ragin et al., 1996; Ragin, 2000, 2008a; Rihoux, 2008; Byrne and Ragin, 2009; Pennings, 2009; Rihoux, 2009; Rihoux and Lobe, 2009; Rihoux and Ragin, 2009; Kogut, 2010; Wagemann and Schneider, 2010). They have been used more and more in the field of comparative politics to analyse a wide number of issues, including democratisation (Schneider and Wagemann, 2006; Schneider, 2008) and party competition (Redding and Viterna, 1999; Veugelers and Magnan, 2005). More recently, fsQCA has been introduced into comparative political communication research (Downey and Stanyer, 2010).

The QCA approach is preferred over more conventional quantitative statistical methods because it provides multivariate analysis techniques suitable for small- to medium-N data – for instance, countries or organisations. Therefore, it allows testing of the joint causal impact of the system-level variables (explored in previous chapters) and party-level factors (described in this chapter) in one model, with campaign professionalisation as the outcome variable. It is important to note that previous studies that focused on the causal role of party-level variables on campaign professionalisation have been restricted by the small number of observations (usually for only one election period) used to test these causal variables' impact on the outcome variable. This has prevented analysis by means of quantitative, multivariate statistical techniques (i.e. multiple-regression analysis) (Gibson and Römmele, 2009; Strömbäck, 2009; Moring et al., 2011). Therefore, although such studies have demonstrated a positive and strong correlation between aggregate scores of party-level variables and professionalisation trends, they cannot tell us much about the

explanatory power of each of the party-specific factors. Unfortunately, a quantitative assessment of their net effects would require more advanced statistical techniques, such as linear regression and, of course, larger datasets.

QCA is also used because it is often better suited to deal with the issues of *causal complexity*, *conjunctural causation*, and *equifinality* than traditional quantitative techniques. Put simply, conjunctural causation posits that it is often the *combination/interaction* of explanatory variables (causal paths or configurations), rather than the additive and linear effects of independent variables, which leads to a given outcome or dependent variable. For this reason, instead of estimating the net effects of single variables, QCA uses Boolean algebra to assess the relationship (or explicit connection) between the outcome and all combinations of multiple causal factors. Since explanatory variables in QCA are not assumed to affect the outcome independently, the term *causal condition* – or *condition variable* – is preferred over *independent variable*. The principle of equifinality posits that different causal paths can lead to the same – or very similar – outcome. For this reason, causality in QCA is not assumed to be ‘symmetrical’. Landman (2008) lists four important reasons why QCA is a powerful tool for the comparison of few cases:

First, it allows for the inclusion of information that has not been measured precisely, but that is represented through reasonable judgements and the application of criteria that are defensible. Second, it uses the combinatory logics of binary variables found in Boolean algebra to simplify the complexity of the world in order to tease out the set of necessary and sufficient conditions that account for an outcome of interest. Third, it allows for an assessment to demonstrate how certain causal conditions *contribute* to an outcome, and how such a contribution needs to take place alongside the presence of other important factors in order for the outcome to take place. Fourth [...] the technique also allows the assessment to determine the reasons for the outcome *did not* occur in certain cases (Landman, 2008: 81).

QCA requires five steps.

- 1) Identification of the positive and negative cases associated with a particular outcome-variable (in this case, campaigning professionalisation).
- 2) Identification of the factors (causal conditions) believed to influence the positive value of the outcome variable.
- 3) The transformation of the outcome- and condition-variables' raw data/indicators into fuzzy-set scores in order to produce a working dataset. This process involves the coding and/or calibration of the outcome- and condition-variables as either dichotomous (crisp-set) or more continuous (fuzzy-set). In contrast to earlier versions of QCA (crisp-set QCA), which only allowed for the use of dichotomous variables (Pennings, 2009; Rihoux and de Meur, 2009), fsQCA permits the use of dichotomous and continuous variables in the same model (see Table 25). Whereas the coding of dichotomous variables only entails the setting of the cross-over point in order to assign the value of 1 or 0 to each case, the transformation of raw data into fuzzy-set scores requires three thresholds: one for defining full membership (1), one for full non-membership (0), and one to indicate the cross-over point (0.5). Then, the calibration function of the fsQCA software can be used to calculate the cases' fuzzy-set membership scores in each causal and outcome variables (*direct method of calibration*). It is important to mention that, although the threshold setting and the calibration of raw data to determine the extent of membership of a given case in a set can be computer assisted, they are not mechanical processes, and analysis should be based on theoretical and substantive grounds (Ragin, 2008a, 2009).
- 4) Construction of the 'truth table' – or table of configurations – which is a synthetic display of all configurations based on a given dataset. It can be seen as the most complex answer to the question on which conditions – or combinations of conditions – are sufficient for a given outcome to (or not to) occur.

- 5) Analysis of necessary conditions and the test for sufficient conditions for both the presence and absence of the outcome. This step requires the use of Boolean algorithms in order to find the simplest patterns in the configuration of causal conditions that lead to a positive and negative value in the outcome variables.

Table 25 Crisp Versus Fuzzy Sets

Crisp set	3-Value fuzzy set	4-Value fuzzy set	6-Value fuzzy set	'Continuous' fuzzy set
1 = fully in	1 = fully in	1 = fully in	1 = fully in	1 = fully in
			0.9	0.9
		0.8 = mostly but not fully in	0.8	0.8
		0.67 = more in than out	0.7	0.7
			0.6 = more or less in	0.6
	0.5 = neither fully in nor fully out			0.5 = neither in nor out*
			0.4 = more or less out	0.4
		0.33 = more out than in		0.3
			0.2 = mostly but not fully out	0.2
				0.1
0 = fully out	0 = fully out	0 = fully out	0 = fully out	0 = fully out

Source: Adapted from Ragin (2008a: 31).

*cross-over point/maximum ambiguity

Selection and Operationalisation of QCA Variables

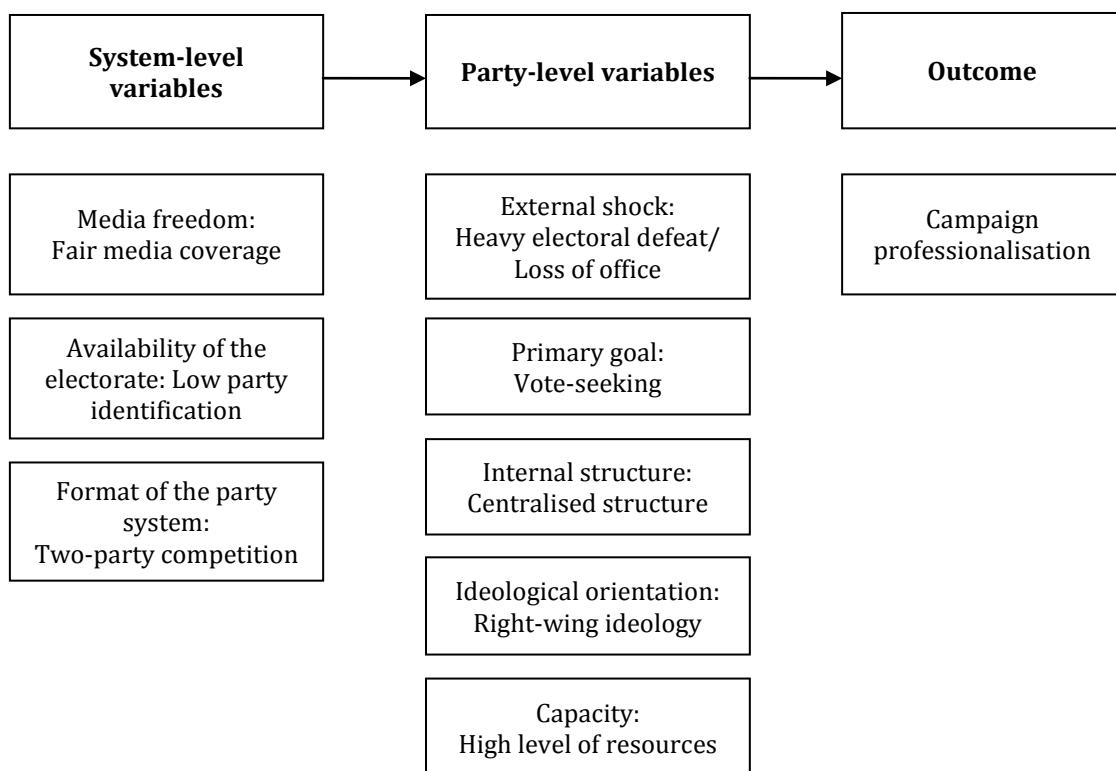
Outcome variable

Campaign professionalisation (camprof): Fuzzy scores of the outcome variable were obtained from the camprof index scores of the three leading parties' presidential campaigns during the 1988-2006 period (see Table 24 in the previous chapter). Scores were processed through the direct method of calibration by using the compute command and the calibrate function of the software package fsQCA (Ragin, 2008a:b).

Causal conditions

Campaign professionalisation is a fairly complex process that involves party-level responses to major structural changes in the political party and the media systems. This study identifies eight factors which are deemed significant to explain the professionalisation of Mexican presidential election campaigns. They involve three systemic conditions: the level of media freedom, the availability of the electorate, and the format of the party system. There are also five party-specific conditions, including external shocks, as well as the party's primary goal, internal structure, ideological orientation, and resource capacity (see Figure 22).

Figure 22 Explanatory Model of Campaign Professionalisation



I now describe the system- and party-level causal conditions included in the analysis, and how they were operationalised for QCA. The media and party system causal conditions were derived from the raw data set out in Chapters 3 and 4, also following the direct method of calibration. Party-specific

variables were coded dichotomously by using the indirect method of calibration, based on secondary literature and sources (full description and details on the coding and calibration of the variables are provided in Appendix B).

Media system change

- 1) **Media freedom.** *Fair media coverage (fairmedcov)*: As discussed in Chapter 5, media system conditions are important for explaining campaign professionalisation. Here, I focus on the differences in media coverage in order to develop an index that measures the degree of fairness in the media coverage of election campaigns for all parties (see Figure 8). Other media system related factors were also considered to be included in the analysis, such as changes in the levels of media concentration and media freedom during the analysed period. However, it was considered that the most proximate factor fostering the adoption of media-centric campaign innovations were changes in the degree of electoral pluralism and autonomy in media coverage (Swanson and Mancini, 1996a).

Electoral/party system change

- 1) **Availability of the electorate.** *Low party identification (lowpartyid)*: Among the changes in the structure of the electorate that favour electoral professionalism is the increasing availability of independent or non-aligned voters. ‘A direct cause for campaign innovations is seen in the changing relationship between parties and the electorate. This mainly refers to the weakening of party ties’ (Holtz-Bacha, 2004: 224). Similarly, Klesner (2005) argues that the process of Mexican voters’ dealignment from the PRI is key to understanding changes in parties’ electoral strategies, since ‘[w]ith more independent and weakly attached voters in the electorate in the 1990s, the parties [...] were forced to adapt their campaign strategies to capture the floating voters now available to the opposition’ (Klesner, 2005: 104-105) (see Chapter 4). The size of the available electorate is measured by the proportion of independent

voters in each election (the higher the numbers of independents, the higher the available electorate). The levels of party identification were preferred over other, alternative measures of electoral availability that focus on the behaviour rather than the structure of the electorate (such as levels of aggregate electoral volatility) because they provided more variation over the time period under analysis.

- 2) **Format of the party system.** *Two-party competition (twopartycom)*: An electoral market factor that fostered professionalisation is the format of the party system. According to Klesner (2005), the combination of the predominant two-party competition with single-member district plurality elections has also encouraged Mexican parties' adoption of media-based, catch-all electoral strategies (Klesner, 2005). This is measured through the proportion of relative-majority electoral districts (300) with bipartisan competition (Effective Number of Parties value between 1.5 and 2.5) (see Table 5 in Chapter 4).¹²⁸

Party change

Party-specific conditions

Intervening conditions

- 1) **External shock.** *Heavy electoral defeat/loss of office (extshock)*: Most party scholars argue that party change usually comes after an external shock, such as an electoral defeat or poor electoral performance (Panebianco, 1988; Katz and Mair, 1992; Harmel and Janda, 1994; Katz and Mair, 1994). External shocks also play an important role in a number of theoretical and empirical accounts of campaign professionalisation (Harrop, 1990; Müller, 1997; Gibson and Römmele, 2001; Espíndola, 2006; Gibson and Römmele, 2009). For an electoralist or a catch-

¹²⁸ I consider that, although the party system is dominated by three big parties, in some Mexican states the structure of competence is rather more bipartisan: for instance, between the PRI and the PAN in the north, or between the PRI and the PRD in the south of the country.

all party, change is considered most likely to occur after loss of office or a dramatic collapse in its electoral support. It was dichotomously coded with 0 = no shock and 1 = external shock.

- 2) **Primary goal.** *Vote-seeking (catch-all):* Following Gibson and Römmele (2001), it is hypothesised that a party with vote-maximisation as its primary goal (catch-all, cartel, or electorally oriented party) would be more positively oriented to adopting professional, capital- and media-intensive campaign techniques, given that they would allow them to read and adapt more rapidly and efficiently to changes in the structure and behaviour of the electorate. It was coded as a dichotomous variable with 0 = non-catch-all and 1 = catch-all and the crossover point was set at 35 percent of the vote.
- 3) **Internal structure.** *Centralised structure (centralisation):* According to Gibson and Römmele (2001), parties with a more centralised, internal organisational culture and structure are more likely to adopt professionalised campaigning, as they are more capable to carry out the extensive internal structural and cultural changes required by the adoption of professional campaign innovations – such as the buying of external expertise – than parties with decentralised organisational structures (Mair et al., 1999; Norris, 2000). Following Moring et al. (2011: 55), it was defined as ‘an existing tradition of hierarchy and importance of party leadership’. It was also coded as a dichotomous variable, with 0 = decentralised and 1 = centralised.
- 4) **Ideological orientation.** *Right/centre-wing ideology (rwideology):* Some studies suggest that having an ideological standpoint compatible with the use of ‘business-type’ practices may be a relevant factor promoting campaign professionalism (Kavanagh, 1995; Scammell, 1995; Gibson and Römmele, 2001). According to this perspective, parties with a right-wing or centre-right ideological orientation are expected to be more positively disposed towards the adoption of marketing principles and techniques and the use of outside consultancy firms than left-wing parties, which are usually more closely tied to grassroots mobilisation tactics,

and thus more reluctant to adopt these ‘business-type’ practices. It was dichotomised as 1= right/centre-right, 0 = left/centre-left). Coding was done based on substantive knowledge, but also considering other sources, such as voter and elite surveys and party manifestos.

- 5) **Capacity.** *High level of resources (highresour):* The adoption of professional, capital- and media- intensive campaign innovations requires substantial financial resources, due to their high cost (Gibson and Römmele, 2001). In contrast, ‘[i]t is the campaigns that are overmatched financially that resort to old-fashioned personal contact [with voters]’ (Green and Smith, 2003: 335). This was measured by overall party expenditure in the election year. Parties were ranked from 0 to 1, according to their reported campaign spending.

Table 26 displays the fuzzy-set membership scores of campaign professionalisation, as well as the structural and party-level causal conditions included in the model.¹²⁹

Table 26 Fuzzy-Set Membership Scores of Campaign Professionalisation and Causal Conditions

Party	Professionalisation	Fair media coverage	Low party ID	Two-party competition	External shock	High resources	Right-wing ideology	Centralisation	Catch-all
PRI1988	0	0	0	0.2	0	1	1	1	1
PAN1988	0	0	0	0.2	0	0	1	1	0
PRD1988	0	0	0	0.2	0	0	0	0	0
PRI1994	0.55	0.35	0.41	0.71	1	1	1	1	1
PAN1994	0.2	0.35	0.41	0.71	0	0.3	1	1	0
PRD1994	0	0.35	0.41	0.71	0	0.1	0	0	0
PRI2000	0.83	0.97	0.74	0.74	0	0.9	1	0	1
PAN2000	0.95	0.97	0.74	0.74	0	0.8	1	1	1
PRD2000	0.39	0.97	0.74	0.74	1	0.7	0	0	0
PRI2006	0.73	0.96	0.83	0.65	1	0.9	1	0	0
PAN2006	0.94	0.96	0.83	0.65	0	0.8	1	1	1
PRD2006	0.8	0.96	0.83	0.65	1	0.7	0	0	1

¹²⁹ Details on the raw data used and the calibration of the fuzzy scores are provided in Appendix B.

QCA Analysis

FsQCA software (Ragin et al., 2009) was used in order to produce the truth table (Table 27); Boolean minimisations were used to reduce the complex expressions displayed in it.¹³⁰ In this table, each row represents a sufficient causal configuration – or statement of sufficiency – for campaign professionalisation (rows with Camprof = 1) and non-professionalisation (rows with Camprof = 0).

Table 3 shows that most cases are analytically different from each other, since, except for the first configuration, all rows (or configurations) with empirical evidence contain just one case each.

Table 27 Truth Table of Configurations of Causal Conditions of Campaign Professionalisation

	Fair media coverage	Low party ID	Two-party competition	External shock	High resources	Right-wing ideology	Centralis.	Catch-all	Camprof	Consist.	Cases
1	1	1	1	0	1	1	1	1	1	1	PAN00 PAN06
2	1	1	1	1	1	1	0	0	1	1	PRI06
3	1	1	1	1	1	0	0	1	1	1	PRD06
4	1	1	1	0	1	1	0	1	1	1	PRI00
5	0	0	1	1	1	1	1	1	1	0.93	PRI94
6	1	1	1	1	1	0	0	0	0	0.55	PRD00
7	0	0	1	0	0	1	1	0	0	0.29	PAN94
8	0	0	0	0	0	1	1	0	0	0.21	PAN88
9	0	0	0	0	1	1	1	1	0	0.11	PRI88
10	0	0	1	0	0	0	0	0	0	0.11	PRD94
11	0	0	0	0	0	0	0	0	0	0.08	PRD88

Consistency cutoff: 0.932203

Analysis of necessary conditions for campaign professionalisation

First, I tested for necessary conditions. Necessary conditions are those that must be present for a given outcome to occur, but their presence do not guarantee that occurrence (see, for more on necessary conditions, Goertz and Starr, 2003). The fuzzy-set analysis of necessary conditions is presented in Table 28. According to it, no condition is a 100 percent consistent necessary condition

¹³⁰ Software and documentation available at: www.fsqca.com or www.u.arizona.edu/~cragin/fsQCA/

for campaign professionalisation to occur. Three conditions, however, display high consistency values: fair media coverage, high resources, and low party ID, and are thus closer to necessary conditions. All of them seem relevant rather than irrelevant factors in a context of liberalisation from a dominant party system. Since necessary conditions are usually removed from parsimonious solutions (Ragin, 2008a), it should be noted that fair media coverage and low party identification were not components of the two paths leading towards the outcome variable offered by the parsimonious solution of the sufficiency analysis.

Table 28 Analysis of Necessary Conditions: Outcome of Campaign Professionalisation

Conditions tested	Consistency	Coverage
Fairmedcov	0.94	0.76
~fairmedcov	0.20	n.r.
Lowpartyid	0.90	0.81
~lowpartyid	0.39	n.r.
Twopartycom	0.85	n.r.
~twopartycom	0.44	n.r.
Extshock	0.44	n.r.
~extshock	0.55	n.r.
Highresour	0.91	0.70
~highresour	0.27	n.r.
Rwideology	0.76	n.r.
~rwideology	0.23	n.r.
Centralisation	0.48	n.r.
~centralisation	0.51	n.r.
catch-all	0.74	n.r.
~catch-all	0.25	n.r.

n.r. = not relevant because consistency value too low

Analysis of sufficient conditions: campaign professionalisation

The FsQCA software produces three different causal solutions: complex, parsimonious, and intermediate. First, I will examine the four configurations included in the complex solution, which is a minimal formula derived without the aid of any logical remainders (configurations of conditions that lack empirical observations). The character ~ signals negation or the absence of causal conditions (see Table 29). It should be noted that all of them exhibit high consistency values, superior to 0.85

(the cut-off point recommended by Ragin), and so can be regarded as sufficient causal paths to professionalisation. It is important to note that I also ran models with only systemic and only party-specific variables. However, their solutions (not shown here) displayed quite low consistency values if they were to be considered sufficient causal solutions (Ragin, 2008a). They also covered only a small number of cases (limited coverage). This indicates that neither system- nor party-level conditions are by themselves sufficient to produce campaign professionalisation.¹³¹

Table 29 Analysis of Sufficient Conditions for Campaign Professionalisation (Complex Solution)

Configuration/Causal recipe	Coverage	Consistency	Cases (solution set membership)
1 fairmedcov*lowpartyid*twopartycom* ~extshock*highresour*rwideology*catch-all	0.38	1	PAN06 (0.65), PRI00 (0.74), PAN00 (0.74)
2 fairmedcov*lowpartyidc* twopartycom* extshock*highresour*rwideology*~centralisation*~catch-all	0.11	1	PRI06 (0.65)
3 fairmedcov*lowpartyid*twopartycom* extshock*highresour*~rwideology*~centralisation* catch-all	0.11	1	PRD06 (0.65)
4 ~fairmedcov*~lowpartyid* twopartycom* highresour*extshock*rwideology*centralisation*catch-all	0.09	0.93	PRI94 (0.59)

Solution coverage: 0.718412, solution consistency: 0.990050, consistency cut-off: 0.932203

Let us examine the complex solution first (Table 29). According to this, all the systemic variables, involving fair media coverage, low levels of party identification (or a high proportion of independent voters), and two-party competition, combined with party-specific factors such as right-wing ideology and high campaign resources, are sufficient to produce professionalised campaigning, even in the absence of external shock. In three out of four configurations, media and party system conditions seem to play a more important role in fostering professionalisation. In the same causal recipes,

¹³¹ In this sense, correlation analysis shows a strong and positive relationship between systemic variables and the scores of the Index of Professionalised Campaigning (0.87), significant at the 0.01 level. It thus suggests that the degree of campaign professionalisation is driven, but not determined, by system-level variables. I also performed a non-parametric test (Kendall's Tau) in order to compensate for the small number of observations (N=12). The correlation was 0.73, and significant at the 0.01 level.

access to high campaign resources – a party-specific factor, but highly shaped by changes in the regulatory framework of party and campaign financing (see Chapter 6) – is present.

In the fourth recipe, party-specific variables, in combination with two-party competition, are sufficient to produce professionalisation. However, this configuration only covers one case, with a moderate level of professionalisation: the PRI in 1994. The party-centred theory of professionalised campaigning (Gibson and Römmele, 2001) argues that parties with a centralised organisational structure are more likely to professionalise their campaign efforts than parties with a more decentralised organisation. However, the results of this solution raise questions about the relevance of centralisation for campaign professionalisation in presidential systems, since the Mexican presidential candidates of the PRI and the PRD have been able to run fairly professionalised campaigns with decentralised party structures: the former in 2000 and 2006, and the latter in 2006.

Table 30 Analysis of Sufficient Conditions for Campaign Professionalisation (Parsimonious Solution)

<i>Configuration/Causal recipe</i>	<i>Coverage</i>	<i>Consistency</i>	<i>Cases (solution set membership)</i>
1 twopartycom*catch-all	0.60	0.91	PAN06 (0.65), PRD06 (0.65), PRI00 (0.74), PAN00 (0.74), PRI94 (0.71)
2 twopartycom*highresour*rwideology	0.64	0.89	PRI06 (0.65), PAN06 (0.65), PRI00 (0.74), PAN00 (0.74), PRI94 (0.71)

solution coverage: 0.759928, solution consistency: 0.907328, consistency cutoff: 0.932203

I now turn to the paths included in the parsimonious solution shown in Table 30, which uses all logical remainders, thus allowing both easy and difficult counterfactuals. This solution includes two causal paths to professionalisation. Essentially, it suggests that the key factors that explain campaign change are two-party competition in combination with party-level variables, such as catch-all behaviour, or high resources and right-wing ideology. This is not to say that other party and media system conditions are not significant. During the mid-1990s, changes in the media system and electoral law effectively levelled the country's electoral arena. Thus, systemic (perhaps necessary) conditions of professionalisation, such as an increasingly competitive and available electoral market

and a competitive and free media system, were set in place in the 2000s for the first time. It is on this level playing field that party-specific factors became increasingly relevant to explain parties' success or failure to professionalise their campaign practices.

Both recipes have a high enough level of consistency to be considered sufficient paths to professionalised campaigning. However, the first path, involving only bipartisan competition and catch-all behaviour and organisation, appears oversimplified and theoretically contestable, since it is difficult to run this kind of capital-intensive campaigning without at least having enough resources. The second configuration is theoretically and empirically more compelling, since right-wing and centre-right parties with substantial resources in a competitive, two-party electoral environment seem more able to adopt professional campaign practices. This is true even in the absence of fair media coverage, external shock, and party-specific variables (such as centralisation), or even catch-all status. However, unlike the first path, this does not explain the PRD's professionalisation in 2006.

Table 31 Analysis of Sufficient Conditions for Campaign Professionalisation (Intermediate Solution)

<i>Configuration/Causal recipe</i>	<i>Coverage</i>	<i>Consistency</i>	<i>Cases (solution set membership)</i>
1 fairmedcov*lowpartyid*twopartycom* highresourc*rwideology*catch-all	0.44	1	PAN06 (0.65), PRI00 (0.74), PAN00 (0.74)
2 fairmedcov*lowpartyid*twopartycom* highresourc*extshock*catch-all	0.18	1	PRD06 (0.65)
3 fairmedcov*lowpartyid*twopartycom* highresourc*extshock* rwideology	0.18	1	PRI06 (0.65)
4 twopartycom*highresourc*extshock* rwideology*centralisation*catch-all	0.09	0.77	PRI94 (0.71)

solution coverage: 0.718412, solution consistency: 0.961353, consistency cutoff: 0.932203

Table 31 presents the intermediate solution. As with the parsimonious solution, this is a minimal formula, but determined with the aid of only those logical remainders which are consistent with the researcher's theoretical and substantive knowledge. Thus, the minimisation is based on the assumption that the presence of causal conditions should contribute to the outcome (thus permitting

only ‘easy’ counterfactuals). The intermediate solution is quite similar to the complex one, since it also includes four different paths to professionalisation. And actually, it adds little parsimony to the complex solution. However, as expected, centralisation was removed from three of the four causal recipes. This is because intermediate solutions usually exclude those variables that theoretically should, but do not, contribute to explain the outcome.

Again, four causal conditions – fair media coverage, low party ID, two-party competition, and high resources – emerge as the most important factors shaping professionalisation in three of the four causal pathways, but only when combined with party-specific conditions such as catch-all behaviour, an external shock, or right-wing ideology. Moreover, these causal configurations cover five of the six cases of professionalisation. The results of the three solutions suggest that centralisation is the one party-specific ‘priming’ variable which does not seem to be as relevant as the party-centred theory initially argues. It only contributes to explain one instance of professionalisation, being the PRI in 1994. However, the formerly dominant party has also been able to run fairly capital- and media-intensive campaigns in a context of increasing decentralisation. Similarly, the PRD has never been a truly centralised party, but ran a relatively professionalised campaign in 2006.

Analysis of the non-occurrence or negation of the outcome: structural and party-specific blocks to professionalisation

The issue of causal asymmetry – or asymmetric causation – is one of the most important axioms of qualitative comparative analysis (Ragin, 2008a). Put simply, asymmetric causation means that different combinations of causal variables may be relevant when explaining either the presence or absence of a particular outcome. Or, in other words, the factors – or combinations of conditions – responsible for the occurrence of a given outcome are seldom the inverse of those leading to its non-occurrence. Thus, one common and important good practice in QCA is not only to analyse the occurrence, but also the absence of outcome variables (Schneider and Wagemann, 2010). The aim is to shed light on the factors blocking the emergence of professionalised campaign practices.

Analysis of necessary conditions for the absence of campaign professionalisation

Table 32 shows the results of the analysis of the same causal conditions, with the absence of professionalisation as the outcome. In contrast to the analysis of necessary conditions with professionalisation as the outcome, no necessary conditions were found. All values were too low to be considered necessary conditions.

Table 32 Analysis of Necessary Conditions for the Absence of Campaign Professionalisation

Conditions tested	Consistency	Coverage
Fairmedcov	0.37	n.r.
~fairmedcov	0.75	n.r.
Lowpartyid	0.42	n.r.
~lowpartyid	0.82	n.r.
Twopartycom	0.59	n.r.
~twopartycom	0.66	n.r.
Extshock	0.23	n.r.
~extshock	0.76	n.r.
Highresour	0.49	n.r.
~highresour	0.67	n.r.
Rwideology	0.57	n.r.
~rwideology	0.42	n.r.
Centralization	0.51	n.r.
~centralisation	0.48	n.r.
catch-all	0.29	n.r.
~catch-all	0.70	n.r.

n.r. = not relevant because consistency value too low

Analysis of sufficient conditions for the absence of campaign professionalisation

The sufficiency analysis of the absence of campaign professionalisation also offers three different causal solutions. The complex causal solution with the negation of professionalisation as the outcome provides four causal recipes (see Table 33). According to the first causal recipe, the lack of fair campaign coverage and a broad and strong partisan alignment to the PRI, combined with the absence of an external shock, lack of financial means, left-wing ideology, and a sectarian, niche-oriented and decentralised party organisation, is a sufficient configuration to explain the PRD's failure to professionalise its campaigns. According to the second recipe, the lack of professionalisation in the PAN during the same period is explained by a quite similar configuration of conditions, the one difference (besides ideological orientation) being that the PAN was a more centralised party. Since the lack of resources was heavily determined by the regulatory framework of party and campaign financing, it was factors external to opposition party organisations that seem to have been mostly responsible for the lack of campaign professionalisation in all cases, but especially during the late 1980s. It could be argued that, since both parties were predominantly niche-oriented rather than catch-all competitors, lack of catch-all behaviour and organisation cannot be ruled out as a relevant causal factor. However, under such extremely difficult structural conditions, even displaying catch-all behaviour would have been perhaps insufficient to produce professionalised campaigning.

Table 33 Analysis of Sufficient Conditions for Non-Campaign Professionalisation (Complex Solution)

Configuration/Causal recipe	Coverage	Consistency	Cases (solution set membership)
1 ~fairmedcov*~lowpartyid*~highresour* ~extshock*~rwideology*centralisation*~catch-all	0.236842	1	PRD1988 (0.94), PRD1994 (0.59)
2 ~fairmedcov*~lowpartyid*~highresour* ~extshock*rwideology*centralisation*~catch-all	0.236842	1	PAN1988 (0.94), PAN1994 (0.59)
3 ~fairmedcov*~lowpartyid*~twopartycom* ~extshock*highresour*rwideology*centralisation*catch-all	0.134675	1	PRI1988 (0.8)
4 fairmedcov*lowpartyid*twopartycom* extshock*highresour*~rwideology*~centralisation*~catch-all	0.094427	0.871429	PRD2000 (0.7)

Solution coverage: 0.702786, solution consistency: 0.980561, consistency cutoff: 0.871429

Something similar can be argued with respect to the third causal recipe, which explains only one instance of non-professionalisation, being the formerly dominant party's campaign in 1988. This recipe includes structural factors such as the lack of fair media coverage (or in this case, substantial media control), a strong partisan alignment to the PRI, and the absence of party competition, combined with party-level variables such as high resources, right-wing ideology, centralisation, and catch-all behaviour. Despite the presence of party-specific factors in this configuration, systemic conditions that largely favoured the dominant party also seem to have been mostly responsible for the absence of professionalisation in the 1988 PRI presidential campaign. The fourth configuration explains the PRD's failure to adopt professionalised campaigning in 2000, at a time when the campaign context was much more open to this kind of labour-intensive campaign style. It clearly shows that party-specific variables, such as the party's left-wing ideological orientation, and the lack of a catch-all organisational and centralised structure, were responsible for the PRD's failure to run a more professionalised presidential campaign in that election.

Table 34 Analysis of Sufficient Conditions for Non-Campaign Professionalisation (Parsimonious Solution)

Configuration/Causal recipe	Coverage	Consistency	Cases (solution set membership)
1 ~lowpartyid*~extshock	0.662539	0.912580	PRI1988 (0.94), PAN1988 (0.94), PRD1988 (0.94), PAN1994 (0.59), PRD1994 (0.59)
2 ~rwideology*~catch-all	0.390093	0.840000	PRD1988 (1), PRD1994 (1), PRD2000 (1)

Solution coverage: 0.815789, solution consistency: 0.855519, consistency cutoff: 0.871429

Note: Solution based on the selection of one prime implicant out of two logically redundant (the second one was ~fairmedcov).

Table 34 presents the parsimonious solution, which includes two different recipes. The first one combines an unavailable electorate with the lack of an external shock, and covers all the cases with no —or low— professionalisation, including the formerly dominant and opposition parties. It seems that the capacity of opposition parties to professionalise their campaigns was hampered by the unavailability of the Mexican electorate, and the absence of a perceived electoral failure or decline in support. Under such favourable electoral environment conditions, professionalisation was simply redundant to the PRI's electoral success, since it merely had to focus on the mobilisation of its support base by means of traditional, clientelist, labour-intensive campaign practices. In the second causal recipe, particularly relevant to the PRD, two party-specific conditions – its left-wing ideological standpoint and niche orientation – emerged as the most important factors preventing campaign professionalisation. This configuration covers all instances of the non-professionalisation of the PRD.

Although both configurations show high consistency values, they should be taken with caution: particularly the second, since it suggests that party-specific variables are sufficient to explain the absence of professionalisation or, in other words, that extremely hostile media and party system conditions, such as the ones prevailing in the 1988 and 1994 elections, were irrelevant to explain the lack of professionalisation of the PRD. Party-specific factors were, probably, more important in 2000 to explain the PRD's failure to adopt professionalised campaigning, once the systemic conditions which had sustained single-party dominance had substantially diminished. However, the lack of

campaign change of the PRD – and the PAN as well – during the 1980s and the first half of the 1990s seems to be better explained by structural rather than party-specific variables. Consequently, the first causal recipe, in which an unavailable electorate plays a central causal role in preventing professionalisation, seems more convincing. Theoretically, then, it could be argued that the limited party competition and the resulting lack of party and campaign change could be better explained by the limited availability of the Mexican electorate.

Table 35 Analysis of Sufficient Conditions for Non-Campaign Professionalisation (Intermediate Solution)

Configuration/Causal recipe	Coverage	Consistency	Cases (solution set membership)
1 ~fairmedcov*~lowpartyid*~twopartycom*~extshock	0.476780	1.000000	PRI1988 (0.8,0.97), PAN1988 (0.8,0.97), PRD1988 (0.8,0.97)
2 ~fairmedcov*~lowpartyid*~highresour*~extshock*~catch-all	0.473684	1.000000	PAN1988 (0.94,0.97), PRD1988 (0.94,0.97), PAN1994 (0.59,0.8), PRD1994 (0.59,0.94)
3 ~rwideology*~centralisation*~catch-all	0.390093	0.840000	PRD1988 (1,0.97), PRD1994 (1,0.94), PRD2000 (1,0.61)

solution coverage: 0.766254, solution consistency: 0.911602, consistency cutoff: 0.871429

The intermediate solution offers three causal configurations (see Table 35). In the first one, three systemic conditions – involving biased media coverage, a low number of floating voters (due to the high PRI macro-partisanship), and lack of party competition, combined with the lack of an external shock – explain the absence of professionalisation in 1988 for all parties. In the second recipe, unfair media coverage, the reduced size of the available electorate, the lack of an external shock, scarce campaign resources, and catch-all behaviour are sufficient to explain the lack of professionalisation of opposition parties in the 1988 and the 1994 elections. It should be noted that, unlike the previous solution, this one shows that it was not only a hostile media and electoral markets that were the factors responsible for opposition parties' lack of professionalisation, but that party-level variables, such as niche-oriented organisation and the minimal resources available to candidates, also played a

role in preventing campaign change. Although this configuration covers the elections of 1988 and 1994, it seems more suited to explaining campaign continuity in the 1990s.

Finally, in the third configuration, party-specific variables fully explain the absence of professionalisation for the PRD from 1988 to 2000, without recurring to any systemic condition. According to this recipe, being a left-wing and decentralised party, but without displaying the behaviour and organisation of the catch-all type, presents insurmountable obstacles to campaign professionalisation. This configuration is quite similar to the second parsimonious solution; thus, it shares the same flaws. It is difficult to explain the absence of professionalisation in the PRD in the 1988 and 1994 elections (especially in the former) theoretically, without taking into account the impact of extremely unfavourable systemic conditions. For this reason, this recipe seems to be much more relevant to explain the PRD's failure to professionalise its campaign efforts in 2000.

Conclusion

This thesis argues that, although professional campaign innovations in Mexico may have been primarily driven by major changes in the electoral, legal, and media arenas discussed in previous chapters, internal party traits mattered as well. This is particularly so when explaining differences in terms of the timing and level of professionalisation between parties. Party-centred analyses of professionalised campaigning stress the role of party-level variables – such as parties' organisational features, resources, and behaviour – in the move from traditional to professionalised campaign practices (Gibson and Römmele, 2001, 2009; Strömbäck, 2009; Moring et al., 2011). The evidence presented here also lends support to this view. Both the Qualitative Comparative Analysis presented in this chapter and the detailed narratives in Chapters 7 and 8 show that structural changes were insufficient to produce the professionalisation of Mexican campaigns, and that party-level dynamics also played a crucial role in the process. The QCA analysis indicates that party-specific variables such as catch-all behaviour and organisation, the parties' ideological orientation, and the availability of a high volume of campaign resources contributed significantly to the adoption of professional

campaign innovations by main Mexican parties. External shocks also played a relevant role in some cases of campaign professionalisation, particularly for the PRI. The analysis also suggests that centralisation does not seem to be as important as the party-centred theory of professionalised campaigning argues.

Nevertheless, as similar analyses (Strömbäck, 2009), this study indicates that, though important, the impact of party-specific variables in the professionalisation process should not be overestimated. According to the QCA results, in none of the instances of professionalisation did party-level variables alone explain the adoption of professionalised campaigning, but always in conjunction with changing structural conditions. Statistical analysis also supports this claim: the correlation between the scores assigned to the parties in the Professionalised Campaign Index and the overall sum of the scores of party-level variables was positive and strong (0.58), and statistically significant at the 0.05 level. A non-parametric test (Kendall's Tau) was also run to compensate for the small number of observations. The correlation was 0.47, and significant at the 0.05 level. It is thus clear from these results that the professionalisation of Mexican campaigns was the outcome of a fairly complex interaction between major changes in the political and media environments and party-specific conditions.

10 Conclusions: The System- and Party-Level Determinants of Campaign Professionalisation in Mexico

Introduction

The main argument of this thesis is that, in any polity where parties are relevant in structuring political competition, the professionalisation of political campaigns should be understood as part of a broader process of party change and adaptation to profound transformations in the political and media systems. More specifically, the evidence presented in this study shows that campaign change in Mexico was the outcome of a fairly complex interaction between both structural and party-specific conditions. The aim of this chapter is to provide a detailed narrative that integrates the findings on the causal role of the system- and party-level variables discussed in previous chapters in the campaign professionalisation process. First, I review the impact of changes in the electoral and media arenas, as well as the rules of political finance. Then, I analyse the relevance of a number of party-specific variables – including electoral shocks, catch-all organisation and behaviour, ideology, resources, and centralisation.

The Role of Systemic Variables

Along frequent violations to civil liberties, an uneven electoral playing field in terms of ‘access to resources, media, and the law’ (Levitsky and Way, 2010a: 10) is a key aspect of competitive authoritarianism that ‘allows incumbents to thwart opposition challenges without resorting to significant fraud or repression’ (Levitsky and Way, 2010b: 60). Opposition parties in competitive authoritarian regimes generally lack access to political finance and major media outlets in order to compete on a relatively even footing against autocratic incumbents that abuse systematically of state resources and institutions. Under such conditions, political competition remains substantially limited, and professional, capital-intensive campaign innovations are highly unlikely (if not impossible) to occur.

As discussed in previous chapters, a number of systemic factors pertinent during the authoritarian period prevented campaign change in Mexico to a large extent. In the 1988 elections, for instance, the electoral and media markets (see Chapters 4 and 5), as well as the rules of political financing (see Chapter 6), were still so rigged in favour of the dominant party that modern campaign innovations were practically unnecessary for PRI candidates, and almost impossible for their rivals to develop. The government's control of the media, the resource asymmetries between the PRI and the opposition, the low availability of the electorate, and the resulting limited extent of electoral competition constituted tremendous obstacles to the professionalisation of Mexican campaign practices. Under such uneven structural conditions, party-level factors had little relevance to the issue of campaign continuity or change.

The role of party-specific variables, however, started to grow in importance in the early 1990s, mostly for the ruling party. The PRI took advantage of its substantial resources and catch-all and centralised organisational structure in order to modernise its electoral strategies in the 1991 and the 1994 federal elections. This was in response to decline in its electoral support and the rise of party competition across the country in the late 1980s. The impact of party variables was more restricted in the case of the PRI challengers, however. Certainly, the lack of resources and niche orientation of opposition party organisations played some role in preventing the adoption of professional, media-based campaign innovations for the PAN and the PRD presidential nominees in 1994 (particularly for the latter). This is reflected in the parties' structures of electoral expenditure during this contest. Even though both parties devoted most of their (still limited) campaign resources to operating expenses, and advertising in other contexts than paid media, the PRD's media spending amounted to only 2 percent of its total electoral outlays, compared to 35 percent of the PAN's in the 1994 election (see Chapter 6). Indeed, both parties had extremely limited private fundraising

capacity, and most of their scarce resources came from public funding.¹³² In addition, media coverage was still substantially biased in favour of the PRI. Thus, there was still only limited room for opposition parties' agency in that election. As Wallis (2001: 233) points out, '[n]o matter how sophisticated a campaign the opposition might have liked to have run [...] the structural obstacles were too difficult to surmount'.¹³³

Nevertheless, by the late 1990s the campaign context had changed dramatically. Decades of socioeconomic development had shifted the structure of the Mexican electorate, and the recurrent economic crisis in the 1980s and mid-1990s had fostered increasing voter detachment from the PRI (Molinar, 1991b; Klesner, 1994, 2005). Furthermore, neo-liberal economic reforms during the 1980s and the first half of the 1990s had eroded the dominant party's main source of patronage (Greene, 2007). And the large-scale electoral reforms of the first half of the 1990s had provided substantial public funding for all parties, levelling the electoral playing field and markedly increasing the competitiveness of the party system (Molinar, 1991b; Becerra et al., 2000; Méndez de Hoyos, 2006).

Major structural transformations were not only restricted to the political system, but occurred in the media system as well. Increasing market competition in the mid-1990s, also as a result of economic reform and privatisation, propelled the opening-up of the media and saw significant changes in election news coverage, all of which reflected the increasing pluralism of the Mexican electorate and further contributed to a fairer and more competitive market-place for votes (Trejo Delarbre, 2001; Lawson, 2002; Hughes, 2006). Therefore, from the late-1990s onwards, 'on both finance and media grounds, the opposition has been able to compete on something like a level playing field' (Wallis, 2001: 233), and a number of structural conditions necessary for the rise of

¹³² The dominant party's control over the economy and the lack of rotation in government discouraged private donors from funding opposition parties.

¹³³ In fact, it was not until the 1997 mid-term elections that both parties professionalised their electioneering efforts in a consistent and systematic fashion (the PAN, though, adopted some professional campaign innovations in 1994).

professionalised campaigning were by now in place. It was in this newly competitive electoral environment that party-level variables played an increasingly important role in shaping – or in some cases preventing – campaign change.

The Role of Party-Specific Variables

External shocks

External stimuli (or shocks), such as electoral defeats or dramatic falls in electoral support, are the focus of much of the literature on campaign change (Harrop, 1990; Gibson and Römmel, 2001, 2009). Previous studies on electoral campaigning in Latin America have also seen external shocks as explanatory factors of campaign professionalisation. In his comparative analysis of campaigning trends in Argentina, Chile, and Uruguay, Espíndola (2006) concludes that ‘[r]ecent electoral campaigns in the Southern Cone show a significant presence of professionalised campaigning, much of it introduced as a consequence of shocks or events that were largely external to political parties’ (Espíndola, 2006: 130).¹³⁴

The evidence presented in the current thesis shows that external shocks did play a role in some instances of professionalisation in Mexico, particularly for the formerly dominant party. The 1988 electoral scare was a relevant factor triggering the PRI’s adoption of a number of modern campaign innovations in the 1991 and the 1994 federal elections. However, the impact of electoral failures was less clear in the campaigns of successive PRI presidential nominees. For instance, it is highly debatable whether the historic PRI defeat in the 2000 presidential election fostered increasing professionalisation six years later, since Madrazo’s campaign in 2006 was actually no more

¹³⁴ It should be noted that Espíndola’s analysis not only focuses on electoral defeat and loss of office, but also includes other types of external events, such as proscription during military dictatorships, economic crises, and external support for democratisation. These factors make it difficult to analytically distinguish between external shocks and broader systemic changes.

professionalised than Labastida's. For opposition parties, on the other hand, electoral shocks were much less relevant in fostering campaign change, for a number of reasons. First, it is important to note that a number of opposition parties' heavy electoral defeats during the 1980s and the 1990s were not seen in that way by opposition leaders and activists. In large part this was because for most of the authoritarian period it was not unusual for opposition parties to lose a presidential election by a wide margin to the hegemonic PRI (as was the case in the 1982 and 1985 elections). In some other elections, parties tended to regard their candidates' defeats as the consequence of electoral fraud, rather than the result of campaign dynamics and strategies. For instance, the PRD and the PAN defeats in the 1988 election were not processed as failures. In the case of the PRD, although Cárdenas only got 31 percent of the vote, versus 51 percent secured by the PRI nominee, this was the highest figure that had been attained by an opposition presidential candidate since the revolution. What is more: because the election was marred by fraud, party elites and activists actually believed that Cárdenas had, in fact, won the election. Something similar can be said of the PAN's defeat in that race.

One might expect that later on, when elections became more competitive, electoral failures would have become more relevant in driving campaign innovations for all parties. However, this was not always the case. For instance, although the Cárdenas defeat in the 1994 election was in fact perceived as a failure – in large part because, unlike 1988, he came a distant third place in the race – it did not produce a substantial shift in his campaigning style in the 2000 presidential election. His poor electoral performance in 2000 may have contributed to the increasing professionalisation of the López Obrador campaign efforts in 2006, but it seems more plausible that other factors, such as the closer electoral contest, the availability of a wealth of resources, and the party's increased catch-all orientation, were more relevant. In short, it seems that other party-specific conditions have significantly mediated the impact of electoral-market competitive pressures and electoral failures on party and campaign change.

Nevertheless, most party scholars agree that an electoral setback – especially when it involves loss of office – usually serves as a powerful catalyst for strategic and internal organisational change, since it results in a substantial loss of resources, which in turn produces substantial internal pressure for transformation (Panebianco, 1988; Katz and Mair, 1992; Harmel and Janda, 1994; Katz and Mair, 1994). But several empirical accounts of party change in a range of national contexts show that even with external shocks to the party, strategic and organisational innovations, including changes in campaign tactics and strategies, can be impeded, or even prevented, by a number of internal party traits (Panebianco, 1988; Kitschelt, 1994; Harmel et al., 1995; Müller, 1997; Roberts, 1998; Burgess and Levitsky, 2003; Levitsky, 2003; Greene, 2007; Levitsky, 2007). These accounts conclude that parties' responses to external stimulus for change are not as straightforward as early models of party competition suggested (Cotter, et al., 1989; (Downs, 1957). And so, an increasing number of analyses seek to understand how external incentives interact with internal party variables in producing party change and adaptation (Müller, 1997).¹³⁵ For instance, important changes in parties' organisational characteristics, issue positions, and electoral strategies can be blocked by party leaders, bureaucrats, or factions if they feel that their positions may be put at risk (Panebianco, 1988). In some other cases, path-dependency with respect to past practices and organisational features may also hamper organisational innovations (Panebianco, 1988; Greene, 2007) (see, for an excellent review on the different theoretical approaches to party organisational change, Harmel, 2005).

¹³⁵ Some analysts, for instance, seek to understand the actions of the dominant coalition/faction within the party, the struggles among potentially dominant factions, or changes in the internal power relationships among groups within the party (Ishiyama 1995; Levitsky 2003; Panebianco 1982; Roberts 1998). Some others focus on the interests and potential payoffs of leaders (Ishiyama 1995; Koelble 1992), while others look more at different aspects of parties' institutional and organisational flexibility (Kitschelt 1994; Levitsky 2003; Roberts 1998; Greene, 2007; (Burgess and Levitsky, 2003; Levitsky, 2007).

Catch-all organisation and behaviour

Mexican parties responded in different ways to the challenges posed by the new and more competitive electoral market. Such responses were largely determined by electoral dynamics and incentives external to parties, but also by their organisational capacities and resources. And so, of the party-level variables included in the QCA analysis (see Chapter 8), party organisation and behaviour of the catch-all type emerged as particularly relevant to explain Mexican parties' adoption of professional campaign practices. In the case of the PRI, its catch-all orientation played a significant role in the modernisation and diversification of the party's electoral strategies as the electoral market became increasingly competitive.

Dominant parties like the PRI are not easy to classify according to the models defined in the U.S. and European literature on parties and party systems. While some authors regard it as a mass-bureaucratic party (Mizrahi, 2003), some others consider it as to be a catch-all party that 'has lacked a clearly defined ideology, and its primary purpose is not to make policy but to garner votes for establishment candidates [...] [a party] seeking support from all social classes and casting its net across the ideological spectrum from left to right' (Handelman, 1997: 68). Indeed, the hegemonic PRI draws broad electoral support from a range of constituencies, including peasants, blue-collar and white-collar workers, professionals, and small-business owners through its corporatist structures (the labour, agrarian, and popular sectors) and wide patronage networks. Its greatest support, however, has traditionally come from the rural, less affluent and less educated sectors of the population (see also, Klesner, 2005).

Yet, by the late 1980s, socioeconomic modernisation had shifted the weight of the Mexican electorate from rural to urban areas, diminishing the size of the party's core constituencies on the one hand and increasing the size of those social groups outside its traditional support bases – such as the urban poor and middle classes – on the other (Molinar, 1991b; Klesner, 1994; Pacheco Méndez, 1995). In this new electoral environment, the party's traditional corporatist linkages, which had

primarily relied on unions and peasant organisations, became increasingly ineffective in delivering votes, particularly in the country's urban centres. Thus, the party leadership of the PRI replaced them with new clientelist linkages during the 1990s (Collier, 1992; Levitsky, 2007). The party's traditional corporatist structures – especially the labour sector – were circumvented through the PRONASOL program and the so-called 'Territorial Movement', a massive, grassroots electoral mobilisation program aimed at building new patronageclientelist networks with mass constituencies outside the party's traditional base, particularly with low-income urban sectors (Dresser, 1991; Collier, 1992; Cornelius et al., 1994; Calderón and Cazés, 1996; Bruhn, 1997; Magaloni et al., 2007). Additionally, the PRI developed poll-driven and media-based programmatic appeals at the national level and in urban areas, targeted at the middle classes (Solís Cámara, 1994; Heras, 1999).

The successful PRI election campaigns of 1991 and 1994 are clear examples of the diversification in the PRI's electoral tactics and strategies, which would have been quite difficult, if not impossible, to achieve without the party's large – and almost unrestricted – access to government resources, as well as its catch-all and highly centralised organisational structure (see, for more on the PRI's strategic organisational restructuring, Gibson, 1997; Levitsky, 2007). But this twofold electoral strategy did not come without issues. Langston and Benton (2009) note that there have been 'struggles within the PRI over the best way to approach campaigning in the competitive period, with some leaders of the "territorial base" of the party arguing that spending on rallies and clientelist exchange are better forms of meeting the opposition challenge than simply relying on TV appeals' (Langston and Benton, 2009: 147).¹³⁶ The tension between territorially based and media-oriented elites still persist within the party to the present day and, as seen in Chapter 7, it posed

¹³⁶ By contrast, those party leaders who are not tied to the party's base are quite sceptical about the effectiveness of these old-fashioned campaigning methods, since they 'strongly believe that that most part of the money that is invested in *invigorating the party's base* is stolen by these more traditional party leaders and does little to win votes on Election Day' (Langston and Benton, 2009: 147-48 – emphasis in the original).

significant barriers to the further professionalisation of the PRI's presidential campaigns in the 2000 and 2006 elections.

In contrast to the PRI, opposition parties did not have access to a 'politicized state bureaucracy' and resources. They also lacked the 'grassroots structures that permit direct contact with (and the delivery of concrete material benefits to) voters' (Levitsky, 2007: 209). Therefore, they were at great disadvantage in their attempts to adopt an electoral strategy based on large-scale clientelistic exchange. Thus, given their position, it was much more feasible for them to follow a more programmatic, poll-driven and media-based, catch-all electoral approach in order to challenge the PRI's dominance. However, this was not necessarily easy to achieve. For most of the authoritarian period, the PAN and the PRD were small parties with limited campaign resources and electoral mobilisation capacity (see Chapters 3 and 4). As Greene (2007) notes, the impediments to party development faced by elites and activists who joined opposition parties when resource asymmetries and the use of targeted repression were high forced them to build small party organisations with highly exclusive affiliation rules, primarily oriented to recruiting 'hard core activists who were more likely to remain active despite high costs and low benefits' (Greene, 2007: 208). They were also forced to maintain tight, programmatic linkages with core (albeit reduced) electoral constituencies. Although these niche-oriented organisational structures were important – perhaps crucial – for opposition parties' development and survival under single-party rule, they were ill-suited to adapting to an increasingly competitive electoral market (Greene, 2007; see also, Mizrahi, 2003).

Thus, despite the diminishing PRI incumbency advantages and the increasing number of floating voters and media opening during the 1980s and 1990s, a number of opposition parties' ideologico-programmatic and organisational dynamics – involving activist recruitment, candidate selection, and campaigning – still displayed niche-oriented features in the mid-1990s that prevented them from taking advantage of growing electoral dealignment and so expand their limited bases of

support (Klesner, 2005; Greene, 2007). This greatly delayed the transformation of their parties into catch-all competitors, and impeded the transition from traditional, labour-intensive practices to modern, capital- and media-intensive campaign methods. Regardless of increasing media opening and the growth of public campaign financing, the leaders, candidates, and activists who joined opposition parties in their early stages tended to prefer specialised policy appeals to core constituencies by means of grassroots campaigns.¹³⁷ By contrast, the more moderate and pragmatic personnel who joined them after the dominant party's resource advantages had substantially diminished were more willing to make centrist appeals to the electorate at large through media-based campaign communication channels (Greene, 2007).¹³⁸

The decline of the PRI incumbency advantages and the rise of electoral competition would eventually lead to significant changes in the opposition parties' elite recruitment dynamics – and in their internal balance of power – that allowed them to gradually move away from a niche to an electoralist catch-all position, and adopt a more professionalised and media-intensive campaigning approach.¹³⁹ However, the opposition parties' catch-all transformation has been a slow and halting

¹³⁷ Greene (2007) notes that this was particularly true in the case of the PRD, since 'many older-style party elites had dedicated their lives to consciousness raising and local organization building'. However, it applies to the PAN as well, since campaigning was seen as a method to educate citizens and to disseminate the ideological principles of the party, rather than a vote-seeking instrument, by the older generation of activists (see also Mizrahi, 2003).

¹³⁸ It should be noted that niche-oriented organisational features and behaviour were mutually reinforcing and complementary. For instance, restrictive recruitment practices provided opposition candidates with passionate and highly committed party and campaign activists who fully engaged in labour-intensive campaigns, facing the challenging task of persuading voters to embrace their programmatic-based appeals and refuse the patronage-based appeals of the dominant party. However, the reduced numbers of these 'grassroots gladiators' posed important restrictions to opposition parties' electoral mobilisation capacity in the new, competitive campaign environment. Thus, one of the reasons that the presidential candidate of the PAN in 2000 built a para-party organisation was not only to get additional private funds, but also to recruit campaign activists en masse in order to supplement the still limited activist base of his party (Greene, 2007).

¹³⁹ The substantial decline of resource asymmetries between the PRI and the opposition parties shaped an increasingly competitive electoral market, and made the PAN and the PRD sufficiently attractive to more moderate and pragmatic politicians who were more disposed to change their parties' organisational characteristics, issue positions, and political strategies.

process. For instance, Mizrahi (2003) contends that, even after the PAN came to power in 2000, it still exhibited sectarian features (closed and exclusive elite affiliation patterns) that limited its capacity to respond effectively to a changing and more demanding electorate.¹⁴⁰ Clearly, path-dependency with respect to earlier, niche-oriented models of party organisation and behaviour delayed the adoption of professional, media-based campaign practices for both parties. Nevertheless, path-dependence has been considerably stronger in the PRD than in the PAN: it could be argued that campaign professionalisation in the centre-left party has been slower and more halting than in its centre-right competitor.

While the PAN's presidential candidates have generally been very responsive to changes in the electoral and media environments, and most likely to use centrist programmatic appeals and poll-driven, and media-based campaign strategies, along the lines of electoral-professional parties in advanced Western democracies (Panebianco, 1988), their PRD counterparts have tended to rely excessively on the sorts of grassroots tactics that foster personal contact with voters. Indeed, the PRD's origins in the Cárdenas grassroots campaign of 1988 would strongly determine the party's subsequent presidential electioneering efforts. Despite the defeat, this race was seen as a successful experience by party elites and activists, and so appropriate to be repeated in subsequent elections. This was regardless of the large-scale electoral and media system changes and substantial campaign professionalisation on the part of the PRI and the PAN. And so, in spite of the failings of Cárdenas' races, López Obrador also privileged people- over media-intensive channels in the early stages of his campaign. It was not until the final phase of his race that he adopted a more media-oriented campaigning approach. By contrast, according to Langston and Benton (2009), the centre-right party was 'the best able to professionalise its campaign strategies because it had no strong leaders

¹⁴⁰ She also argues that, even though the PAN and the PRD adopted catch-all features during the 1980s, they moved again to a more sectarian position during the 1990s.

defending the ground war, and it did not have a foundational moment that was based on this same style of campaigning' (Langston and Benton, 2009: 149).

Ideological orientation

According to party-centred accounts of professionalised campaigning, an ideological orientation consistent with the use of business-type practices, such as marketing and outside consultancy, can play some role in the emergence of professionalised campaigning (Gibson and Römmele, 2001). Consequently, right-wing and centre-right parties are generally seen as more likely to adopt the sorts of marketing principles and techniques that were first used in the private sector than their left-wing/centre-left competitors (Gibson and Römmele, 2001). Following previous works (Kavanagh, 1995; Scammell, 1995; Webb, 2004; Gibson and Römmele, 2009; Smith, 2009), this study lends support to this argument. The centre-right PAN found it much easier to adopt a number of professional, marketing-based campaign innovations than its left-wing competitor. This is especially true after it attracted into its ranks a considerable number of small- and middle-size business entrepreneurs – so-called *neopanistas* – who were profoundly dissatisfied with the PRI-regime's economic policies (particularly the 1982 debt crisis and the nationalisation of the private banking system). The PAN even gave them substantial freedom to define the party's electoral tactics and strategies, and organise election campaigns (Mizrahi, 1994; Loaeza, 1999; Mizrahi, 2003; Shirk, 2005). Entrepreneurs not only contributed to the party financially, they also became candidates of the PAN, and played a critical role in the organisation of the campaigns (Mizrahi, 1994: 139). As Klesner notes, *neopanistas* played an important role in the transformation of the PAN's electoral strategies because they 'preferred a catch-all party to a confessional party' (Klesner, 2005: 130). Their managerial skills, resources, and more modern campaign strategies were crucial to the PAN's electoral success against the PRI in a number of elections – at the municipal and state levels – over the course of the 1980s and 1990s (Shirk, 2005).

According to Mizrahi (2003: 72), ‘from their experience in business organizations, these entrepreneurs gained valuable leadership skills and organisational resources that were later put to use in their political activities’. Perhaps the best example of this was the 2000 presidential race of Vicente Fox. Wallis (2001) indicates that the candidate’s background in the private sector helped him to run a slick and professional campaign, since ‘he utilised the connections and techniques that he developed there to his advantage in the campaign’ (Wallis, 2001: 230). The technocratic orientation of the PRI presidential candidates, as well as the centre-right orientation of the party during the 1990s, also fostered the adoption of professional marketing techniques and external advice. By contrast, the PRD elites were much less positively disposed towards the adoption of such kinds of political marketing practices (Aguilar Zinser, 1995; Oppenheimer, 1996; Bruhn, 1998, 2004, 2009; Langston and Benton, 2009). The rejection of modern campaign styles is, alongside the recurrent internal divisions, institutional and organisational weakness, and confrontational behaviour, perhaps one of the critical causes of the PRD’s electoral failures (Bruhn, 1998).

Campaign resources

Another major party-specific variable in explaining campaign professionalism is the availability of substantial campaign resources. Nevertheless, the extent to which this variable involved only party agency remains arguable. At least until the late-1990s, opposition parties’ resource availability remained heavily dependent on the limited public resources provided by the state, since they were virtually locked out of the private fundraising market. Thus, increases to public party and campaign funding negotiated between the ruling party and the opposition during the 1990-96 period played a large role in enhancing opposition parties’ resource – and therefore campaign – capacity (see Chapter 6). For instance, limited resource availability significantly influenced opposition parties’ electoral strategies in the 1994 presidential election, particularly the preference of grassroots- over media-oriented campaign tactics, since these parties could not match the PRI’s media spending and large-scale, sophisticated, private opinion polling (Aguilar Zinser, 1995).

However, the situation changed markedly in the late 1990s. The 1996 electoral reform made substantial public resources available to them, allowing their candidates to run more capital- and media-intensive campaigns (see Chapter 6). In the case of the PRI, campaign resources were largely dependent on its position as a state party, and followed the government's control of a large public segment of the economy. According to Greene, the state's significant participation in the economy allowed the dominant party to raise much more funds than the opposition in a variety of ways, 'ranging from the direct use of public funds and administrative resources, to the provision of public sector jobs, the use of highly targeted spending bills, and awarding contracts and public protection for corporate kickbacks' (Greene, 2007: 149). However, after neoliberal economic reforms shrank the public sector, and once electoral reforms put more effective barriers to the partisan use of public resources, the PRI had to revert more and more often to alternative financing sources.

Like the opposition parties, the PRI benefited from increases in state funding provided by the 1996 electoral reform (Lujambio, 2003; Iturriaga Acevedo, 2007), and its candidates resorted more often to private fundraising to finance its campaigns (see also Chapter 6). Of course, from its position as the state party, it was much easier for the PRI than for the opposition parties to get additional resources to the ones provided by the law (Lujambio, 2003; Iturriaga Acevedo, 2007).¹⁴¹ According to the parties' self-reported private income, from 1997 to 2000 the PRI raised 64 percent of its total budget through private funding (the PAN raised 25 percent and the PRD only 6 percent) (Iturriaga Acevedo, 2007) (see also Lujambio, 2003).

It should be noted that, despite the parties' increasing dependence on public campaign funding, their organisational capacity to accrue extra campaign resources has increasingly become a key issue in the financing of presidential campaigns and, therefore, in their level of professionalisation. In some cases, private fundraising efforts have proved to be crucial in providing

¹⁴¹ There are no official figures previous to 1994, but other sources suggest that the PRI had tremendous advantages in this regard (Oppenheimer, 1996).

candidates with sufficiently large resources to run highly professionalised campaigns. For instance, Vicente Fox had access to a considerable campaign chest in 2000, not only due to the substantial public financing funnelled through his party, but also thanks to the funds raised by his parallel campaign organisation, *Amigos de Fox* (Shirk, 2005; Greene, 2007). By contrast, campaign financing and innovations in the PRD have typically been more heavily dependent on the financial base provided by the reforms to the system of political financing. This is because the party – and its candidates' para-party – structures have not been able to supply many resources in addition to the ones provided by the COFIPe to the presidential candidates' campaign budgets (Bruhn, 1999, 2004, 2009).¹⁴² For example, from 2001 to 2005, the PRD raised only 16 percent of the legally reported total private funding, versus 45 of the PAN and the 30 of the PRI (Iturriaga Acevedo, 2007).¹⁴³ Of course, this has had consequences for the extent of parties' campaigning professionalisation. Since the PAN and the PRI have counted upon extra campaign resources, their candidates have often been able to run more professionalised campaigns than their PRD counterparts.

Centralisation

The qualitative comparative analysis set out in Chapter 8 raises doubts about the relevance of centralisation for the professionalisation of campaigns. The QCA results do not demonstrate that centralisation is as important as theoretically expected. Having a hierarchical and centralised organisational party structure only appears to be relevant to explaining one instance of professionalisation, being the PRI in 1994. However, the formerly dominant party has also been able to run fairly capital-intensive, professionalised presidential campaigns with an increasingly decentralised organisational structure. Similarly, the PRD has never been a centralised party, but has

¹⁴² For instance, the Cárdenas campaign in 2000 had to supplement public resources with bank loans (Bruhn, 2004).

¹⁴³ It should be noted that this has often involved illegal campaign financing practices (Córdova Vianello and Murayama Rendón, 2006).

adopted a number of professional campaign innovations as well. On the other hand, the absence of a hierarchical party culture and structure appears to be of some relevance when combined with other party-specific factors – such as the lack of catch-all behaviour and organisation – but only to explain the absence of professionalisation in the PRD's campaigns in 1994 and 2000.

This is not to say that the presence/absence of a hierarchical internal party structure does not matter at all. The professionalisation of campaigning is a fairly complex and multidimensional process and, clearly, a number of important campaign functions relative to management are substantially dependent upon the extent of internal centralisation offered by party organisations to their candidates. This allows more control, and provides a higher level of coordination and discipline over the party's campaign communications, strategies, and objectives. Some of the campaigns analysed certainly indicate that the lack of a disciplined and centralised party structure may well not impede capital and media-intensive campaign innovations, but might put significant obstacles in the way of achieving an effective and centralised campaign command structure. For instance, a number of campaign staffing and management issues in the 2006 López Obrador presidential campaign seem to be related, to some extent, to his party's undisciplined and decentralised organisational structure (Bruhn, 2009). Similarly, the PRI presidential nominees Labastida and Madrazo seem to have faced significant campaign coordination issues under the PRI's increasingly decentralised organisational structure.¹⁴⁴ This suggests that the relationship between centralisation and professionalisation is not as clear and straightforward as might be expected, and requires further theoretical elaboration and analysis.

¹⁴⁴ While in the past the PRI was a highly centralised party, by 2000 the increasing strength of governors and the resulting decentralisation seem to have diminished the capacity of the CEN to coordinate and control campaign activities.

Conclusion

This study shows that the professionalisation of political campaigning in Mexico was a process driven by significant structural, democratisation-related transformations involving: 1) the transition from a dominant party authoritarian system with extremely limited electoral competition to a multiparty and fully competitive one; 2) the move from an authoritarian to a hybrid media system with predominantly civic and market-driven components; 3) last but not least, large-scale reforms to the system of political finance. Substantial increases to public financing for all parties in the mid-1990s had a triggering effect on the adoption of professional, capital-intensive campaign innovations. This has important implications for the comparative analysis of campaign professionalisation in cases of democratisation from competitive authoritarian regimes, characterised by ‘resource disparities; unequal access to the media; and unequal access to the law’ (Levitsky and Way, 2010b: 58). The Mexican experience strongly suggests that without significant changes in terms of access to campaign resources and the media (particularly television) for all parties, campaign professionalisation is not likely to happen. Thus, the emergence of a level electoral playing field is perhaps a condition *sine qua non* for campaign change in these sorts of hybrid regimes.

On the other hand, this study also shows that, although important, systemic changes cannot fully explain professionalisation trends in Mexico. Substantial cross-party differences in the level of campaign professionalism during the analysed period, indicate that factors other than structural changes also played a key role in the process, even though structural transformations had already levelled the electoral and media arenas to a great extent. Previous studies on campaigning professionalisation in other Latin American countries have concluded that variation in parties’ responses to the availability of new political marketing techniques and changes in their opponents’ campaigning styles ‘have to a certain degree been related to internal factors, such as party’s history and ideology, but that a deciding element has been external events or shocks that have affected the party or the whole political system’ (Espíndola, 2006: 117). By contrast, this work actually shows that,

although the transition from traditional to modern campaign practices in Mexico was driven by systemic changes and factors external to party organisations, intra-party variables also substantially shaped the adoption of professional, media-centred campaign innovations across parties. Particularly relevant party-specific factors were the move from niche-oriented to catch-all party organisations, the availability of a high volume of campaign resources, and the parties' ideological orientation. Thus, while party-specific factors were not the ultimate causes of campaign change, they were key mediating conditions between the political opportunity resulting from major transformations in the political and media systems on the one hand, and campaign innovations on the other. They are therefore crucial in order to explain cross-party differences in terms of campaign professionalism in Mexico.

Appendix A

Coding for the Campaign Professionalisation Index

The Campaign Professionalisation Index comprises twelve items: (1) use of telemarketing; (2) use of direct mail; (3) use of outside political/media consultants; (4) use of opinion polling; (5) use of focus groups; (6) research of own campaign; (7) opposition research; (8) internet-based campaign techniques (interactive website/e-mail); (9) paid advertising; (10) news management; (11) continuous campaigning; (12) separate campaign team. Up to three points can be assigned to each item. The more a campaign engaged or made use of these techniques/developments, the more professionalised it was considered to be. Thus, a fully professionalised campaign would have a score of 36 points. Two basic approaches were taken in the present study in order to assess the extent of the professionalisation of campaign activities.

- The activities were coded ranging from 0 (no use) to 3 (extensive use).

3 = Extensive use.

2 = Relatively often/frequent use.

1 = Low/little use.

0 = No use or almost no use.

- The activities were coded ranging from 0 (no evidence of the activity taking place at all) to 3 (activity was fully developed in the party).

3 = Activity was fully developed in the party.

2 = Activity was seen as extensively engaged in.

1 = Activity was seen as partially engaged in.

0 = No evidence of the activity taking place at all.

1) and 2) Use of telemarketing/direct mail (The campaigns were scored according to the proportion of the population that were contacted via this means).

3 = The campaign contacted 30 percent or more of the voting-age population through telemarketing/direct mail.

2 = The campaign contacted between 15 percent and 30 percent.

1 = The campaign contacted less than 15 percent.

0 = The campaign did not make use of telemarketing.

3) Use of outside political/media consultants

3 = The campaign made frequent/daily use of external political/media consultants and/or advertising agencies, all of whom have, or at least share, equal power with politicians within the party.

- 2 = The campaign made use of outside political/media consultants and/or advertising agencies, who have less power than the politicians of the party or whose function is advisory rather than decisive.
- 1 = The campaign made only occasional use of political/media consultants and/or advertising agencies, who have less power than the politicians in the party.
- 0 = The campaign made no use of outside/external political/media consultants, and/or used their advertising agency only for producing the materials used by the party.

4) Opinion polling

- 3 = The campaign very frequently, or even on a daily basis, conducted or commissioned polls, with the results being used almost daily to inform campaign strategies or messages.
- 2 = The campaign used or commissioned opinion polls relatively often, without necessarily using the results to inform campaign strategies or determine campaign messages.
- 1 = The campaign only occasionally used or commissioned opinion polls.
- 0 = The campaign only made use of publicly available public opinion data, or did not use such data at all.

5) Focus groups

- 3 = The campaign frequently conducted or commissioned focus groups, with the results being used almost daily to inform campaign strategies or messages.
- 2 = The campaign used or commissioned focus groups relatively often, without necessarily using the results to inform campaign strategies or determine campaign messages.
- 1 = The campaign only occasionally used or commissioned focus groups.
- 0 = The campaign never used or commissioned focus groups.

6) Research of one's own party/campaign

- 3 = The campaign had personnel specifically dedicated to researching its own campaign, or commissioned such research.
- 2 = The campaign frequently, although not continuously, researched or commissioned research into its own campaign.
- 1 = The campaign occasionally researched or commissioned research into its own campaign.
- 0 = The campaign never researched its own campaign.

7) Opposition research

- 3 = The campaign had its own unit which regularly and frequently researched the opposition both before and during the election campaign, and which made use of the results to guide campaign strategy and messages.
- 2 = The campaign frequently researched the opposition or commissioned opposition research from outside.

1 = The campaign occasionally researched or commissioned opposition research.
0 = The campaign never researched the opposition.

8) Use of an interactive website/e-mail (email sign-up or electronic newsletters)

3 = The campaign made extensive use of internet-based campaigning techniques.
2 = The campaign made frequent use of internet-based campaigning techniques.
1 = The campaign made only occasional use of internet-based campaigning techniques.
0 = The campaign did not make use of internet-based campaigning techniques.

9) Paid advertising

3 = The campaign made extensive use of campaign ads integrated within the overall campaign strategies or messages.
2 = The campaign made frequent use of campaign ads, without necessarily integrating them into its campaign strategies.
1 = The campaign made only occasional use of campaign ads.
0 = The campaign made no, or almost no, use of campaign ads.

10) Media management

3 = The campaign made extensive use of media-management techniques integrated into the overall campaign messages/strategies.
2 = The campaign made frequent use of media management techniques, without necessarily integrating them into its campaign strategies.
1 = The campaign made only occasional use of media management.
0 = The campaign made no, or almost no, use of media management.

11) Continuous campaigning

3 = The campaign engaged in more than seven of the above activities, six months prior to election day.
2 = The campaign engaged in four to six activities, six months before election day.
1 = The campaign engaged in one to three activities, six months before election day.
0 = The campaign did not engage in any of the activities, six months before election day.

12) Separate campaign team

3 = The candidate had a clearly defined team of personnel working on the campaign at a physically separate location from the ordinary party headquarters.
2 = The candidate had a definable campaign team located at a physically separate location from the party headquarters, but with less than clear boundaries separating them from the rest of the party structures.

1 = The candidate had his campaign team working at a physically separate location from the party headquarters, but with almost no separation from the regular party structures.

0 = The candidate had no clearly distinct campaign team at all.

Appendix B

Thresholds for QCA analyses

Conditions	Description	csThresholds	fsThresholds
Camprof	Level of campaign professionalisation as indicated by the CAMPROF index		1 = 35 0.5 = 18 0 = 1
fairmedcov	Difference in share of television coverage between the two leading parties during the election campaign		1 = 10% 0.5 = 20% 0 = 30%
lowpartyid	Proportion of independent voters in a given election		1 = 50% 0.5 = 27% 0 = 10%
twopartycom	Percentage of single-member electoral districts with two-party competition (1.5 <NP>2.5)		1 = 99% 0.5 = 50% 0 = 1%
catch-all	Percentage of votes obtained in the election/party's vote share	1 ≥ 35% 0 < 35%	

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