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Sección Artículos

Political Exchange in Pre-Electoral Opposition Coalitions' Formation: Testing Process Tracing at the Mexican Subnational Level

*Intercambio político en la formación de alianzas electorales opositoras:
evaluando el rastreo de procesos en el nivel subnacional mexicano*

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ABSTRACT

From a party-oriented perspective, this paper examines the formation of pre-electoral coalitions (PECs) in two subnational contexts in Mexico. The research design involves a comparative analysis of qualitative evidence from two atypical case studies—Estado de México and Tlaxcala—using process tracing. This approach reveals and tests the relationship between multilevel considerations, party size, and the distribution of benefits across different types of PECs. As with every case study, this research has limited external validity since our findings are strongly attached to specific political contexts. The qualitative approach contributes to displaying causality behind Mexican subnational PECs and assessing the relevance of new methodological tools such as process tracing. While disproportionality and vote maximization agreements explain PECs formation, nationalization and competitive candidates explain failed projects.

Keywords: Subnational Pre-Electoral Coalitions, Political Exchange, Multilevel Dimension, Party Size, Benefits Distribution.

RESUMEN

Desde una perspectiva orientada a los partidos políticos, este artículo analiza la formación de alianzas electorales en dos espacios subnacionales mexicanos. El diseño de la investigación consiste en comparar evidencia cualitativa de dos estudios de caso atípico basados en el rastreo de procesos (Estado de México y Tlaxcala). Como resultado, se expone y se valora el vínculo entre consideraciones multinivel, tamaño de partido y distribución de beneficios en diferentes tipos de alianzas. Como en todo estudio de caso, esta investigación tiene una validez externa limitada, ya que nuestros hallazgos están ligados fuertemente a contextos políticos específicos. El enfoque cualitativo contribuye a mostrar la causalidad detrás de las alianzas electorales subnacionales mexicanas y a evaluar la relevancia de nuevas herramientas metodológicas como el rastreo de procesos. Mientras la desproporcionalidad y los acuerdos de maximización de voto explican la formación de las alianzas, la nacionalización y los candidatos competitivos explican los proyectos fallidos.

Palabras clave: alianzas electorales subnacionales, intercambio político, dimensión multinivel, tamaño de partido, distribución de beneficios.

Introduction

As Golder (2005) referred, PECs are quite common around the world, however, the research on PECs is not that extensive. Scholars have devoted efforts to put forth the most recurrent variables involved in their formation, with special regard to the democratic conditions and/or the institutional design they emerge. Nonetheless, most of these studies—which are based on a quantitative perspective—lack causal explanations connecting variables and outcomes. Even though substantial findings have been made, literature on pre-electoral coalitions still claims for such qualitative complement (Bäck & Dumont, 2007) to increase knowledge beyond the statistical ground.

Electoral records confirm PECs as a *dominant strategy* of political parties at Mexico's national and subnational levels (Reynoso, 2011, 2011a; Méndez, 2012; Devoto & Olmeda, 2017), being the latter the most complex due to the (de)centralization¹ process democracy has brought along in this country. Based on Reynoso's (2011) "signaling and competitiveness" hypotheses, the theoretical expectation for gubernatorial elections asserts that when an election is characterized by higher electoral volatility and a narrower margin of victory (MOV), the probability of forming a coalition increases. Additionally, when one PEC is already contending, the coalition strategy is replicated by the opposition. Then, the MOV among the strongest candidates tends to decrease even more (Reynoso, 2011, p. 15), generating a closed competition. Pre-electoral coalitions emerge because of high competitiveness, and when two of them face an election is because of their visible closeness to victory, generally expressed by an exiguous percentual difference reflected on electoral records.

Beyond its statistical significance—as they have been tested quantitatively—these hypotheses are theoretically rejected when approaching some observations (or cases) and then, posing the question: What are the causal mechanisms behind the non-materialization of coalitions, despite favorable conditions to form opposition PECs? Thus, the conditions inhibiting or blocking such expected effects are more than worthy of being investigated (Espinosa et al., 2020). This paper, from a qualitative perspective and a party-oriented theoretical proposal, digs into the still unknown Mexican subnational PECs' *black box of causality* (Trampusch & Palier, 2016); in other words, the gap in understanding how one event (signaling and competitiveness) causes another (PECs concretion). A process-tracing methodology, applied to a small set of two atypical cases,² along with a comparative analysis, was employed to differentiate between systematic and circumstantial mechanisms within the causal framework. The main techniques used for data collecting in two contrasting cases are a press review and 26 semi-structured interviews, mainly performed to local partisan politicians and officers—selected by their closeness to these specific elections or general electoral matters. On the one hand, the Estado de México's governor election (2017), perhaps the most important state in the country, and PRI's (sub) national power core is facing the challenging 2018 presidential election. On the other, Tlaxcala's

1 The Partido Revolucionario Institucional (PRI for its acronym in Spanish), former hegemonic party (Sartori, 1980) until 1997, began to lose power and control in the late 1980's. The fierce electoral competitiveness and natural decentralization configured a new electoral federalism of power concentration within the states, where political parties tried—and in some cases managed—to retain or gain such local political control (Peschard, 2008, p. 40). Ironically, federal democratization evoked some sort of local authoritarianism. That is why subnational and multilevel elections pose substantial challenges for comparative politics in Mexico and Latin America (Suárez-Cao et al., 2017).

2 Selected from a sample of 128 governor elections in Mexico (1994-2017). To access the full database please contact the authors of this article.

governor election (2016), an apparently low national-relevance state, nonetheless immersed in a multiplicity of cross-state and other local elections promoting larger and further negotiations.

Hereafter, we will discuss the available explanations for PEC's formation, followed by the theoretical proposal for approaching these specific phenomena. Next, we explain how and why cases were selected, the basis of the process tracing as a methodological tool, and some insights on data collection and management. Then, we enunciate and discuss the case study results and assess the findings and generalization. Lastly, the findings are synthesized and a highlight of some future coalition research agenda is provided in the conclusions.

Political exchange: The causal link between multi-level considerations, party size, and benefits distribution

Unlike parliamentary systems, where the evidence points to the ideological ground as a relevant feature for PEC's formation (Golder, 2005), literature on presidential systems has shown that besides ideology (Kellam, 2015; Méndez, 2012), electoral competitiveness (Reynoso, 2010, 2011, 2011a), institutional and normative criteria (Clerici, 2013; Clerici & Scherlis, 2014; Machado, 2009), and nation-wide partisan strategies (Cruz, 2014, 2019) comprise the main variables (the so-called *quantitative elements*) around these political collaborations.

So far, parties' rational decision-making and reiteration processes (Bale et al., 2006), the critical context analysis or *external shocks* implications (Haugsgjerd Allern & Aylott, 2009), and post-authoritarian features³ (Reynoso & Espinosa, 2017) emerge as the explanatory alternatives PECs' qualitative research has offered. All these findings are based on political parties' data, not electoral indicators (usually the main quantitative empirical sources).

Quantitative researchers have accurately linked PECs with political parties' exogenous factors; nonetheless, we must not forget that coalitions are indeed political negotiations made by parties. For that reason, so much more needs to be unveiled about these organizations' national and local dimensions, their capabilities, and opportunities for achieving goals, besides all the specifics on political negotiations facing an expected primal outcome: a pre-electoral coalition.

Regarding political parties, a pre-electoral coalition necessarily involves political exchange: a process in which different actors redefine the core of its collective action; joint agreements within asymmetrical power relations, as political parties have common interests, forcing them to discuss different benefits (Aguilar, 2020, p. 69). We should note that such political exchange is

3 In the Mexican subnational arena, pragmatic opposition PECs (PAN-PRD) were commonly constrained by these factors: political hegemony, erosion and electoral cycle (Reynoso & Espinosa, 2017).

not a mathematical addition but a dialogic outcome, where parties' singularity is backed up in the middle of a common proceeding.

Before competing in elections, political parties deal with domestic issues, external affairs, and *nested games*—i.e. the several games an actor gets involved with— (Tsebelis, 1988, pp. 145–146). In Mexico, subnational pre-electoral coalitions are immersed in two kinds of nested games: a) between its own party's national and local authorities,⁴ considering goals, capacities, and victory chances; and b) between allies regarding balance and levels of participation within a potential coalition. In this context, neither the short-term instrumental rationality of the players (focused on the next immediate election) nor the incentive mechanisms for electoral coordination in national and subnational elections operate autonomously (Lago & Montero, 2008, pp. 36–37). Concurrency serves as a complementary explanation (Reynoso & Espinosa, 2017) for these pre-electoral nested games. When national and subnational elections take place simultaneously, the propensity for parties to carry out a joint national strategy increases; when subnational elections are isolated, political forces tend to conduct the best strategies regarding the local frame. Local (within a single state) concurrency can shape arrangements too. The large number of available benefits within the legislative and municipal arenas appear to be a good motivation for political exchange. Therefore, we argue that, causally, multilevel considerations must be the first step for understanding subnational coalitions' formation.

Once parties have roughly settled on the convenience to create a coalition, they still must decide on the specifics; especially which one will be the majoritarian partner of said coalition. Usually, party size measures have been taken for granted or exclusively related to percentage electoral results (Weldon, 2006; Navarrete & Espinoza, 2017), and studies on Mexican pre-electoral coalitions have not been an exception (Méndez, 2012; Reynoso, 2011, 2011a), referring to *large* and *small* parties, assuming that while the first ones seek for electoral victory and all its associated benefits, the latter strictly pursue their survival and some kind of reward granted by the larger parties (Reynoso, 2010, p. 116). In the study of coalitions, party size has been measured through various indicators, including the percentage of votes received in prior elections (Nascimento et al., 2016; Abou-Chadi & Orlowski, 2016), the number of militants and activists (Weldon, 2006), and the connections between the electorate, incumbency, and the number of legislative seats held by each political party. (Schumacher & Giger, 2017, pp. 174–175). Usually, size is con-

4 Besides, the electoral system encourages parties to maintain a national register and to employ every available resource at the subnational level to achieve specific—many times national—goals, not always concurring with the natural course of local competitions. Political centralization has been a common characteristic of the Mexican political system and (national) political parties since electoral regulation—and parties themselves—have not yet given enough self-sufficiency to the local political forces so they can form PECs independently from the national core.

sidered equivalent to strength; a large party is a strong party, and a small party is a weak one (Novák. 2000, p. 28). Therefore, a strong party is one with coalition potential, veto power, and impact on competition; while a weak party cannot win an election on its own, has less to offer, and can only survive—and relatively grow—sheltered by its larger allies.

Bargaining power is also extremely related to size (Lupia & Strøm, 1995) when parties gather to accomplish separate specific goals. As some benefits associated with presidential systems' subnational elections are indivisible and discretionary, parties must achieve mutual but asymmetrical agreements. Since our interest is to delve into negotiation processes, we necessarily need to investigate the intangible aspects of power. A classic conception of power states that: *A* has power over *B*, to the extent that she/he can make *B* do something that she/he would not otherwise do (Dahl, 1957, pp. 202–203). According to Haugaard (2012, pp. 33–34), *A* certainly can have *power over (domination)*, but also the *power for (empowerment)* convincing *B*: whereas domination is an imposition, empowerment can be conceived as a voluntary acceptance of asymmetry. That is the case of PECs. Since formal institutions avoid political coercion between parties, if they choose to merge, it is only because common distributable interests were found within their power relations (Ferrara & Herron, 2005). While many typologies and behavioral models have intended—and succeeded—to describe political parties (Katz & Mair, 2007; Gunther & Diamond, 2003; Strom, 1990; Wolinetz, 2007), it must not be forgotten that electoral competitiveness forces them to change and adopt a rational-pragmatic behavior to survive. Conceiving and understanding political parties is not an easy task. If parties, indeed, are political groups that show at elections and can allocate their candidates in public office (Sartori, 1980, p. 92), they are also organizations of:

competing and co-operating individuals, governed by formal and informal rules and cultural norms and practices [...] substantively rational goals (usually to control, share control of, or at least influence, government) supported by administration and hierarchy; and in the pursuit of its goal(s), specific techniques of organization and communication. (Rye, 2015, p. 1055)

However, power—i.e. how human goals may be shaped and obtained in political parties and political organizations—is not as simple as *party A* influencing *party B*. Such power can be expressed in five different ways: individualistic power, strategic power, administrative power, constitutive power and disciplinary power (Rye, 2015, 2015a); although this theoretical proposal focuses on parties' internal dimension, we argue that these elements can be expressed also by parties (as a whole) and serve as ways of *power for pulling off* (Haugaard, 2012) successful coalitions.

In the prelude of PECs, individual parties simultaneously compete and (potentially) collaborate, leveraging their resources to maximize their benefits based on their preferences—or at least to secure the best possible conditions for collaborative participation (individualistic power). Parties, when negotiating PECs, find themselves immersed in decision-making mechanisms (informal for the most part), in which party agents can take advantage, in case of having the capacity for *loading the dice* (strategic power). As potential PECs demand administrative requirements, capacities, disposition, and commitment, the dimensions of bureaucratic power are relevant too. Partisan life significantly impacts its militants; the abilities, knowledge, and experience they acquire provide leverage in PEC negotiations, particularly in areas such as campaign management and governance skills (constitutive power). Parties and their agents possess technical capacities and skills—social media, image and campaign strategies, election day field-work—which may interest or condition other parties to merge (disciplinary power).

We shall remember as well that parties pursue several benefits and agree on ways in which they will decide *who gets what*. PECs are means for achieving goals, an outcome of strategic coordination between party leaders to obtain mutually beneficial results (Reynoso, 2010, p. 115). Pre-electoral coordination involves potential costs and benefits; if parties sacrifice autonomy, policy interests, and even their political identity, it is because there are enough incentives to do so (Ferrara & Herron, 2005, p. 19). Empirically, seminal hypothetical parameters for benefits distribution answer the concern of how many seats parties must hold in government coalitions and what policy agenda must be followed. In parliamentary pre-electoral negotiations, parties must pay each other within the legislative (or policy) arena as in electoral matters (candidacies) (Carroll & Cox, 2007, p. 300; Chiru, 2015, p. 168). Presidential systems have shown that pre-electoral pacts between parties are equally feasible, from the “programmatic and consensual accommodation of the agenda to the mere pragmatic distribution of power between actors” (Benito, 2010, pp. 769–770).

Unlike government coalitions,⁵ where parties are aware of the electoral results and have certainty over what they can distribute, let us not forget what can be negotiated and of course, distributed, considering PECs' uncertainty regarding the outcome of an election in presidential or majoritarian systems; that is party survival, vote maximization, spots of political participation, election public funds and ideological-programmatic projection. Therefore, proportionality theorists assume the larger party will hold vote maximizing—and the governor candidacy—while

⁵ Usually explained by Gamson's Law, which posits that the number of benefits granted to each political force is proportionally related to their electoral performance (Carroll & Cox, 2007). Reynoso (2011) argues something similar happens in presidential systems' pre-competitive arena, when parties, depending on their size, pursue (and agree on) different benefits. Nonetheless, the cause-effect implications remain(ed) blurry for the Mexican case.

the smaller parties will achieve secondary candidacies and means of policy fulfillment. Here, we expect to know which of, but especially how, these elements are agreed (or not) between parties and if they can constitute a causal explanation around PEC's formation.

Case(s) selection and process tracing

A common dilemma in qualitative research is determining where to focus our attention to maximize the impact and value of our work. Methodological literature asserts case(s) selection strategies are mainly related to research purposes (Gerring, 2008; Seawright & Gerring, 2008). Therefore, while studying typical cases may be convenient for testing and strengthening former hypotheses and revealing causality behind pre-electoral coalitions' formation—from its quantitative original's theoretical statement—it seems more urgent to delve into what happens when the outcome cannot be explained by said theoretical corpus. In other words, to investigate the atypical cases, those who register unusual values regarding the available knowledge are poorly explained by some specific model (Gerring, 2008, pp. 655–656). Yet, atypical cases are not representative; they reflect high statistical residuals in the search for new causal explanations.

Table 1. Set of atypical cases in governor elections (2016-2017).

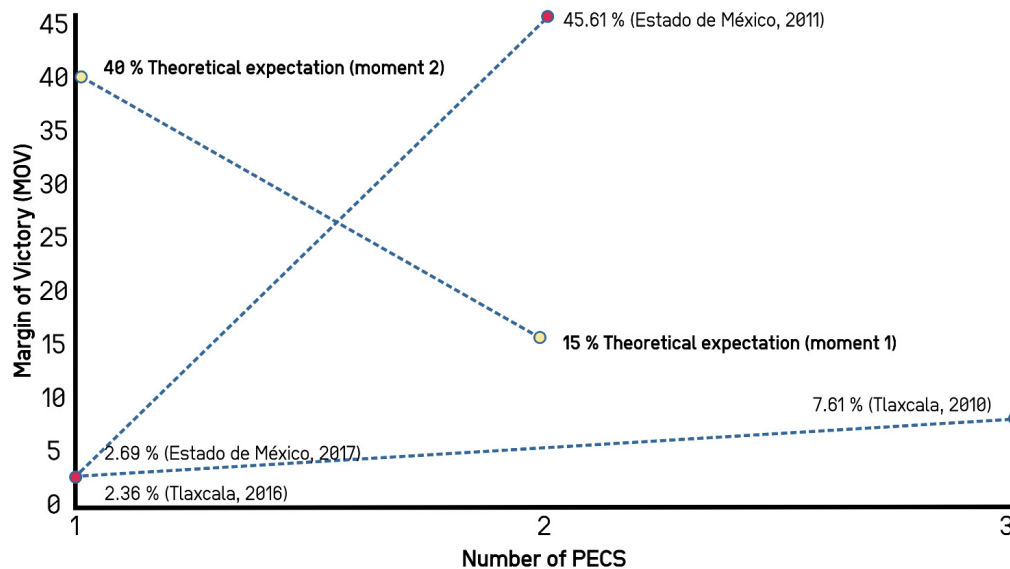
Case	Number of PECs	Number of PECs Variation	Margin of Victory (MOV) Variation
Estado de México	1	-1	-42.92 %
Coahuila	2	-1	-22.48 %
Tlaxcala	1	-2	-05.25 %
Colima	1	-2	-02.70 %
Aguascalientes	1	0	-02.29 %
Puebla	2	0	+01.50 %
Durango	2	1	+01.76 %
Nayarit	2	0	+04.95 %
Sinaloa	2	0	+10.29 %

Source: Own elaboration based on local EMB's official records.

In this way (**Table 1**), we identified and categorized atypical cases—specifically those where the signaling-competitiveness theoretical expectations did not hold—resulting in the selection of the first case: Estado de México (2017). Following the scholarly consensus on intentionally selecting cases based on the behavior of independent variables (King et al., 2000), this decision was made. The case features the second-largest margin of victory (MOV) variation in the entire sample—dropping from 45.61% in 2011 to 2.69% in 2017—between two consecutive elections. Additionally, it represents one of the most nationally significant subnational enclaves in Mexico. Despite plausibility suggesting the formation of multiple PECs (e.g., PAN-PRD; PRD-PT), only one coalition (PRI-PVEM-PANAL-PES) ultimately competed in the 2017 election, defying theoretical expectations.

As we determined to explore the former case in depth, the comparative task would have been exiguous and unfruitful without (at least) another observation or parameters in the seek for generalization. Thus, the upcoming case we should choose had to be comparatively adequate to contrast not only the previously mentioned theoretical inconsistencies, but the most possible MOV's variation (the highest and the lowest within the same established range) too. Tlaxcala fulfilled those conditions in the local elections with an MOV variation from 7.61% in 2010 to 2.36 % in 2016 (**Figure 1**). Considering our hypothesis, it was sought that both cases show, as well, variation regarding the disputed benefits. While the Estado de México's only popular election's office was decided by the gubernatorial race, in Tlaxcala, the local executive electoral process was carried out along with other 25 local deputies, 60 mayors, and 299 presidents of community elections. Despite the high number of benefits disputed in this low national-relevance subnational arena and the theoretical expectation regarding the presence of more PECs (PAN-PRD; PRD-PT), only one succeeded to materialize (PRI-PVEM-PANAL-PS).

Figure 1. Selected cases of atypicality: Estado de México (2017) and Tlaxcala (2016).



Source: Own elaboration based on local EMB's official records.

Note: Theoretical expectation meets a reduced MOV in the presence of two PECs and less competitiveness when only one is contending. Neither the Estado de México (2017) nor Tlaxcala (2016) meets those parameters. Both register high competitiveness despite the reduced number (1) of PECs.

In these two cases, only one PEC managed to materialize, and it is entirely why they both deserve their in-depth analysis, since the theory has adverted a positive relation between narrow margins of victory and two PECs. Given that both pre-electoral coalitions were led by the governing party in each state, it is crucial to understand why the opposition's efforts failed, as well as the reasons for the narrow margin of victory despite those failures.

A case study is a research strategy that seeks to go deep into a single unit to explore its configuration to understand a larger set of units of the same class (Vennesson, 2008, p. 226); process tracing can be thought of as a subtype of a case study (Gerring, 2004, p. 342). A case study is not synonymous with process tracing; however, a case study can be conducted using process tracing as a research tool. Process tracing is designed to uncover causal mechanisms through detailed empirical analysis within a case, revealing the underlying structure of a causal process (Beach, 2017). Process tracing is consistent with a case study since it can be used, first,

to gain a better understanding of the causal dynamics producing an outcome in a particular case; and second, to elucidate generalizable causal mechanisms in a larger population of similar cases (Beach, 2017). All this contributes to reducing the gap between qualitative evidence and formal models (Lorentzen et al., 2016), and as Checkel argues (2005, pp. 22–23), to the solidification of certain methods and scientific realism through complex but systematic research, in order to comprehend (not only describe) social-political phenomena.

A process tracing includes three main research tasks: a) theorizing about causal mechanisms, linking causes and results; b) analyzing observable empirical manifestations about the theorized mechanisms; and c) the complementary use of comparative methods to evoke generalizations of findings, casting causally individual similar case studies (Beach, 2017, pp. 1–3; Ricks & Liu, 2018, p. 842). According to previous literature (Cruz, 2014, 2019; Reynoso, 2011, 2011a; Nascimento et al., 2016) and empirical data, five causal mechanisms (CM) were identified and counterfactually designed for possible dichotomic results. Methodologically, once the call for local elections is considered and published, the *first CM* examines to what extent parties' national dimensions can influence—and even overtake—local agreements. Once the decision to explore the local PEC's alternative is made, the *second CM* involves measuring the size difference between the (now) potential political partners, considering that the more asymmetrical the parties are, the easier it will be to carry out further negotiations. The *third CM* involves benefits distribution, a phase where parties dissect and agree on every specific corresponding profit (candidacies⁶, policy agenda, and public administration offices), of which, several are fully dependent on winning the election. The *fourth CM* involves institutional formalization through a joint register with the local electoral management body (EMB). Finally, the *fifth CM* occurs when parties, at last, begin coordinating their performance and presenting a unified political identity throughout the campaign and leading up to election day.

Given the need for contextual evidence and knowledge, we consulted several sources and data (Trampusch & Palier, 2016, p. 450). Due to its limited availability and the need for feasible empirical evidence to test our research argument, our data came exclusively from key actors and partisan members, as well as from the political-media discourse before the deadlines for forming a joint electoral offer. Thus, among the methodological tasks conducted prior to the analysis, we can highlight national and subnational newspaper reviews and semi-structured interviews with key actors of parties and elections. The first one fulfilled three different goals: it helped identify

6 The strong component of majority in presidential systems (Linz, 1990) can be found as well in the unitary power concentration of the local executive government. In fact, the coalition success depends on the governorship candidacy agreement. Perhaps, that is one of the strongest reasons for the less ideological, more pragmatical pre-electoral coalitions we often observe in presidential environments.

key actors (whom we subsequently interviewed) regarding the influence of natural dynamics behind PEC's projects, and it assessed plausible collaborations between those political actors. On the other hand, interviews are a bit more complex. Political negotiations imply privacy and discretion, and such political exchange is *generally* traceless within the frame of formal parties' documentation. That is why we approached local politicians and those immersed in the electoral processes, to extract such empirical evidence from their perspectives around the cases, always considering biased personal interpretations and diverse contextual-based perceptions.

Results

After conducting process tracing and qualitative data analysis, the atypicality of both cases stemmed from the absence of a larger number of PECs. Empirically, the failed pre-electoral projects proved relevant in demonstrating that overlooked elements can also be sufficient conditions for (not) forming coalitions. Perhaps a coalition between Partido Acción Nacional and Partido de la Revolución Democrática (PAN-PRD) was expected to face the official parties' joint political offer; nevertheless, nor in the Estado de México or Tlaxcala was it successfully materialized.

Both case studies showed a connection between the five causal mechanisms. The divergence in PEC formation can be understood by examining the type of coalition. In other words, the coalitions led by the ruling party (PRI) were easier to form not only because of the significant advantages the governing party held due to its incumbency but also because of the disproportionate size of its political allies. On the other hand, opposition coalitions, that proved ideologically inconsistent (PAN-PRD), had a clear disadvantage regarding the local hegemonic party and a size issue as the benefits distribution required a candidate for the governorship, and neither of them would give it up. Next, we present the results of both case studies.

Estado de México (2017)

This state is the epitome of a subnational case where authoritarianism is evolving into democracy (Muñoz, 2018), since recently (in 2023) alternation was finally achieved after nearly a century, and where local opposition parties have gradually archived goals in the legislative and municipal arenas. Apparently, in 2017, the PRI's decline suggested alternation as a plausible outcome; however, its loyal electorate ensured it remained in power. The first element to highlight is that the PRI—former hegemonic party—has historically shown high levels of cohesion among its elites (Arzuaga-Magnoni et al., 2007) and great party discipline when dealing with internal conflicts (Navarrete & Rosiles, 2018), because “to the extent that the rules allowed the recognition

of spaces for winners and losers, the search for radical competitive strategies among members of the elite was meaningless, strengthening unity" (Arzuaga-Magnoni et al., 2007, p. 151). This is a different issue from the multiple difficulties that opposition parties have historically had regarding unity.

This was a subnational election, with only one position disputed (governorship) in Mexico, in 2017. The state's gubernatorial renewal happened a few months before the historical presidential election in 2018, during which the party system evolved into what experts define as a *satellite bipartisanship*. This took place in a political environment where MORENA (Movimiento de Regeneración Nacional) emerged in the local arena as a competitive party, due to Andrés Manuel López Obrador's growing prominence ahead of the federal election (Interview MH). As we stated previously, the local ruling party (PRI) successfully formed a pre-electoral coalition with Partido Verde Ecologista de México (PVEM), Partido Nueva Alianza (PANAL) and Partido Encuentro Social (PES), all of them small parties who had worked together previously, with a mutual interest in promoting a joint political agenda (Interviews MG and MJ).

Since electoral legislation distinguishes between national and local registers for political parties, the former naturally maintain a connection with their respective national decision-making bodies. The national electoral agreement between the parties stated above existed long before; while PVEM considered it a natural collaboration (Interview MG) for promoting its environmental agenda, PANAL consistently supported the government's agenda in exchange for the implementation of education policies that aligned with its interests (Interview MJ). Therefore, multilevel considerations indicated a natural and seamless bond between these parties, since "it all happened automatically, agreements were made at some level; instructions were given, and we all discussed them with the other local parties' leaders" (Interview MJ). Negotiations about party size were not a problem either, since the PRI's dominance in the state (individualistic power) not only assured this party would provide a higher number of votes in the 2017 election (Interviews MA and MB), but also because the rest of the parties did not even have a candidate of their own (Interview MA). Thus, their lack of disciplinary power *forced* PVEM, PANAL, and PES to be a part of this asymmetrical but profitable deal. Small parties showed plenty of interest in PRI's disciplinary power, especially at *street level*, where polling places full coverage and electoral performance would be assured if they worked together (Interviews MK and MJ). In synthesis, the distribution agreement was structured around vote maximization for the PRI's gubernatorial candidate, Alfredo del Mazo, who served as the coalition's leader and main representative. Concurrently, PVEM, PANAL, and PES secured strategically allocated public administration positions and specific policy commitments (Interviews MA, MB, and MJ).

As the ruling coalition consolidated, the opposition was expected to replicate its strategy. However, the proposed alliance did not result in the successful registration of a joint candidate with the local EMB. Notably, the most anticipated coalition—PAN-PRD—failed to materialize, despite its previous success in other subnational contexts. This coalition was substantial for the decentralization process and for the way local alternation finally happened within Mexican electoral federalism (Peschard, 2008).

In the 2017 electoral process, the PRD faced several internal issues. Among other challenges, some factions opposed the policy of forming pre-electoral coalitions with non-ideological partners, such as the PAN (a right-wing party). They also criticized the lack of compensation in other states, particularly in cases where horizontal concurrency occurred (Interview MD). This internal conflict scaled into a process in which the coalition was debated, along with the selection of a candidate of their own (Juan Zepeda). Although PAN publicly declared its intent to seek political partners, its idea of a bottom-up coalition raised concerns about potential performance issues, suggesting negative effects on their disciplinary power due to impositions from the national party bodies (Interview MK). Since there can only be one candidate, the structure and members of the disadvantaged party may not fully commit to the (dis)agreed project and might not perform as efficiently as they could. Therefore, the multilevel dimension revealed a divergence between national and local partisan decision-making bodies, with partial willingness to form this PEC and clear uncertainty regarding roles within a potential coalition.

The next element to consider in our causal argument is party size, which showed several complications between both parties. Since neither party had empirical evidence to demonstrate electoral dominance, they engaged in a survey-based negotiation to convince the other side whether Josefina Vázquez Mota (PAN) or Juan Zepeda (PRD) would be the ideal candidate to lead the coalition (Interviews MK and MF). Although surveys tend to vary, the lack of a solid argument for leadership was not a significant issue, as both parties and candidates had enough individual power to assert themselves; the real issue lay in the unwillingness to be the non-majoritarian partner in the coalition, as such a party would only be compensated with policy concessions and, perhaps, political positions in the cabinet if the coalition won the election (Interviews MK and MF). Additionally, the potential loss of the electoral capital concentrated in the candidates was also a concern, as it could lead to lower participation on election day.

Clearly, in this subnational case, we observed a political nationalization effect, where nationally centralized decisions in high-relevance local elections impacted the presidential race. Nevertheless, this was not only because of the 2018 federal election, and MORENA as a legitimate rival; the state's national relevance relied in its dense population and profuse financial resources

as well (Navarrete & Rosiles, 2018, p. 197). It is also considered an electoral laboratory, where voting trends may provide public opinion with an indication of what to expect in the presidential election a year later. This is why, in addition to the limited benefits they could gain from PECs in a gubernatorial election, parties overestimated the (in)convenience of presenting themselves as the secondary partner in a coalition.

Tlaxcala (2016)

Tlaxcala is a low national relevance state in Mexican politics; however, it does not mean it's irrelevant regarding subnational elections researchers. Despite being a small state, political-electoral dynamics are complex, as voters have a direct and engaged relationship with political processes (Interviews TD and TM). Tlaxcala also has a highly concentrated political elite, despite experiencing alternation before 2016. Notably, PAN and PRD governors Alfonso Sánchez (1999–2005) and Héctor Ortiz (2005–2011) were both former PRI members who, dissatisfied with their party, left, challenged it, and ultimately defeated it under different political banners. Therefore, we can infer that political capital in Tlaxcala can at times outweigh partisan identities. This is a key contextual factor to explore in local coalitions, as political negotiations are often tied to individual political power. Unlike the unitary gubernatorial election in Estado de México, this case involved a high number of candidacies—1 governorship, 25 local deputies, 60 mayors, and 299 community presidents—making it an enormous undertaking. The competition's new parameters and the need for coordination between national and local EMBs added significant operational challenges in organizing these simultaneous elections (Interviews TM and TI).

In 2016 the local ruling party (PRI) formed a governor pre-electoral coalition with PVEM, PANAL, and Partido Socialista (PS), based on the positive collaborative experience in the 2010 election where the PRI regained the local executive office and the previous national arrangement made with PANAL (Interview TD). The nomination of Marco Mena as the coalition's candidate was another successful decision, as smaller parties acknowledged his political trajectory and saw ideological and programmatic inclusiveness in his electoral platform. For deputy and mayoral candidacies, parties opted to form common candidacy agreements, taking advantage of the different deadlines set in the electoral calendar to determine both the candidates and their respective party affiliations. This regulatory advantage enabled them to design effective electoral strategies tailored to the specificities of each district and municipality.

Causally, multilevel considerations played a crucial role in materializing this PEC. On one hand, parties adhered to a national-level agreement. Unlike the other analyzed case (Estado de México, 2017), the 2016 Tlaxcala gubernatorial election took place alongside multiple other elec-

toral processes. This allowed parties to design multi-state strategies within a broader national framework. In this way, smaller parties aligned with leading candidates in pursuit of advancing their policy agendas (Interviews TE and TJ). On the other hand, local candidacies—such as those for deputies and mayors—are just as important as national considerations, as they provide minority parties with opportunities to promote and strengthen their political participation. Sometimes, the majority partner, as well as within the smaller parties, can find well-positioned politicians who can help the coalition (Interviews TN and TE). Even in an asymmetrical relationship, mutual benefits can emerge if the goals of the parties align—such as vote maximization for the PRI and local candidacies or policy inclusion for the PVEM, PANAL, and PS. The electoral success of 2016 serves as evidence supporting this argument.

Regarding concerns about party size, the PRI's leadership role and ability to lead coalitions were primarily rooted in its strong electoral track record (Interviews TJ, TD, and TF) and its individualistic power dynamics. Within this context, no other party could effectively compete against the PRD or PAN. Consequently, the PRI's undeniable electoral strength was a critical factor in facilitating agreements. Election day holds significant importance for political parties, making disciplinary power a crucial factor in shaping political negotiations. As one interviewee noted, "meaning that a majoritarian partner (i.e., PRI) with a well-organized structure will watch over our votes" (Interview TE). Subsequently, the benefits were distributed without significant issues. Although the selection of some candidates sparked controversy, the parties, aware of their roles within the coalition, demonstrated flexibility in resolving these disputes, as they did not undermine their core interests (Interviews TH and TD). As each party was aware of its specific electoral power, the decision behind Marco Mena's candidacy was unanimous driven by the shared goal of vote maximization. The minoritarian partners had some retribution as well: while PS only managed municipal candidacies, PVEM and PANAL successfully led local deputy candidacies and gained control over certain environmental and educational offices. Additionally, the joint electoral platform was negotiated without significant complications.

The tentative coalition project between PAN and PRD is what made this case atypical. According to Reynoso & Espinosa (2017), Tlaxcala appeared to be a more conducive environment for establishing the antihegemonic PEC, as elections in other states were held the same year. In those states, similar parties attempted to form an arrangement but ultimately failed. Even though the national decision bodies of both parties had established a national strategic coalition to compete in 6 states in 2016, inner party divisions pointed to PAN-PRD's PEC as unfeasible in Tlaxcala. Additionally, both parties already had competitive candidates who were unwilling to relinquish the gubernatorial candidacy. Lorena Cuéllar (PRD), a highly qualified candidate with

an extensive political background spanning multiple parties, is the granddaughter of two former governors of Tlaxcala and possesses significant national and local political experience (Interviews TN and TA). On the other hand, Adriana Dávila Fernández (PAN), a highly skilled politician known for her electoral strength in Tlaxcala and her close ties to Felipe Calderón Hinojosa, also represented a formidable contender (Interview TN).

While the PAN's candidate argued that states should not be treated as bargaining chips, the PRD declared its inability to support Dávila, effectively ruling out its participation as the minority partner in the coalition (Interviews TK and TN). This serves as an empirical statement to infer that competitive candidates can, at times, challenge and constrain the decisions of parties' national leadership. Another significant finding related to multilevel considerations is the insufficiency of local candidacies to form a gubernatorial PEC. The electorate is unlikely to accept coalitions in municipal and local deputy races but not in the gubernatorial race. Moreover, the resources or concessions each party could offer were insufficient to persuade the other to give up the main office (Interview TE).

Party size measurement was the primary challenge in forming such political associations. The fact that in 2010, Minerva Hernández (PRD) withdrew in favor of Adriana Dávila (PAN) as part of an informal alliance tainted the 2016 electoral weight and individualistic power dynamics, which typically serve as the basis for defining a candidate. Consequently, parties relied on alternative parameters and surveys to identify the best-positioned candidate. However, since both Cuéllar and Dávila believed they could win individually, neither saw a reason to concede political capital. In the absence of clear asymmetry, the already strained negotiations ultimately collapsed, resulting in no distribution of benefits.

The in-depth case study of Tlaxcala also revealed a form of nationalization effect, driven not necessarily by the state's significance but by its alignment with other simultaneous local elections. However, formal and informal partisan rules, combined with the presence of strong politicians, tend to complicate PEC negotiations—particularly when parties of comparable size are involved in an election that demands clear leadership.

Conclusions

Pre-electoral coalitions have been rarely researched from a qualitative perspective. Nevertheless, the existing research offers valuable insights into their complexity and highlights how contextual factors mediate between dependent and independent variables (Bale et al., 2006; Reynoso & Espinosa, 2017). There have been proposals for theoretical-based explanations for limited quan-

titative models (Haugsgjerd Allern & Aylott, 2009). In that sense, our main purpose was to delve into some observations that Reynoso's (2011) signaling and competitiveness hypotheses failed to describe, and test theoretical alternatives regarding PEC's formation at Mexico's subnational level.

The application of process tracing in electoral studies proved highly effective, as the causal process demonstrated consistent patterns across both case studies. While the national leadership of parties plays a significant role in shaping subnational coalitions, legislative and municipal positions may facilitate agreements—though they do not appear to be a necessary condition—for establishing a joint gubernatorial candidacy. Regarding party size, empirical evidence pointed at electoral strength, individualistic power, and disciplinary power as its most relevant elements. We shall also note that benefits negotiations mainly consist of vote maximizing, political spots of participation, and ideological-programmatic outreach. Subnational pre-electoral coalitions involve a vertical process heavily influenced by national party leadership, where electoral power and organizational strength are critical factors in determining the partisan identity of the gubernatorial candidate, the allocation of other public offices, and the creation of a joint policy agenda, with the commitment⁷ to 'govern together' if victorious. Interestingly, failed coalitions have proven to be valuable for identifying future possibilities of analysis.

Forming PECs is extremely complex process that depends on a combination of multiple factors, all of which must align within a very limited timeframe. That must be why negotiations are so pragmatic and based on the maximization of parties' different benefits, according to their electoral potential. Therefore, party size is essential to understand agreements. While acknowledging the limited external validity of a two-case study, we conclude that subnational gubernatorial PECs are more likely to materialize when national parties have previously established solid agreements between partners of disproportionate size, as seen in PRI-led coalitions. Evidence shows coalition projects tend to fail when national party negotiations remain unresolved before the local electoral process starts, especially when similar-sized partners (PAN-PRD coalitions) cannot agree on who must lead the PEC.

Much more needs to be done to fully understand subnational pre-electoral coalitions. A first suggestion is to continue analyzing atypical cases to observe the behavior of causal mechanisms in a broader set, including those where anti-hegemonic coalitions (PAN-PRD) successfully materialized. Typical cases are equally valuable for analysis, as they can provide qualitative su-

7 In Mexico, a government coalition is an option, but not an obligation for political parties. The lack of accountability mechanisms between parties in the absence of a formal agreement of government coalition cannot guarantee partners to hold their promises. Empirically, the unfulfillment of pre-electoral pacts is a common feature of post-electoral dynamics and a reason behind the coalition's dissolution in upcoming agreement efforts and elections.

support for previous hypothetical links and enhance the external validity of broader arguments. Gathering first-hand data from national party actors can help assess actual decision-making power and accurately determine the relevance of local competition. A second step would involve a quantitative test related to this alternative explanation. It would be useful to explore whether disproportionality between coalition partners correlates with coalition formation in a large-N sample. To achieve this, employing a disproportionality index as a methodological tool would be an appropriate approach.

Finally, since the success of pre-electoral coalitions is also linked to electoral behavior, we suggest going beyond the analysis of mere electoral results. It is important to examine the effects of a reduced electoral offer and the specific identity of PECs (i.e., the parties involved in a given coalition) on voters' cognitive decision-making processes.

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