MEXICO

López Obrador's "Fourth Transformation"

By Denise Dresser

The new presidency of Mexico's Andrés Manuel López Obrador is akin to a national roller-coaster ride. There are moments of excitement, moments of uncertainty, moments of panic. The new government is moving quickly in order to differentiate itself from past administrations and enacting a broad array of bold changes; some good, some bad, some ugly. The country is caught in a constant whirlwind of presidential announcements, decrees, constitutional reforms, and presidential memorandums, making it difficult to distinguish between what is improvised from what is transcendental, what is authoritarian from what is democratic, what is progressive from what cannot be classified or applauded as such. We live a daily combination of mixed feelings: enthusiasm, doubt, approval, dismay. López Obrador's greatest triumph so far is to shake up the status quo; his greatest challenge is to prove that his "Fourth Transformation" will lead to evolution and not regression.

The president's popularity is undeniable and understandable. The emotion-laden election catalyzed anger with frustrated economic expectations, resentment against rules that are regarded as rigged in favor of the few at the expense of the many, disappointment with established institutions, rancor against vested interests that have profited at citizens' expense, and widespread indignation at a homicide rate that has turned Mexico into one of the most violent countries in the hemisphere. AMLO (as the president is popularly known) and his party, the Movimento Regeneración Nacional (National Regeneration Movement, Morena), won by a landslide and capitalized on a widespread sentiment of indignation. He was perceived as an authentic opposition leader: an insurgent politician who had consistently railed against rapacious elites and a democratic transition gone awry since his first presidential bid in 2006. His message in defense of "the people" resonated like never before because the ills he diagnosed had become increasingly stark and obvious under the Peña Nieto administration.

López Obrador's offer of radical change appeals to a restive population eager for what he calls "regime change." Indeed, Mexico's toxic mix of truncated democracy and crony capitalism are problems that need to be addressed through substantive reform. What is far from clear is whether AMLO has the vision and the policy proposals to solve them in a way that propels the country forward. Many Mexicans hope that López Obrador will ensure truly representative democracy and an inclusive economic system. Others fear that he is pushing the country back through a resurrection of dominant party rule, a renewal of patronage politics, and a return to reinvigorated discretionary presidentialism.

Some Good News, More Uncertainty

The most positive aspects of the new president's vision involve an understanding of the absences and abuses of the state. We've witnessed a significant shift in favor of the victims of state-promoted violence: the creation of a Truth Commission for Ayotzinapa, the establishment of a National Search Commission to find and identify the more than 61,000 Mexicans who are missing, the public apologies to Lydia Cacho and other activists whose rights were trampled. After years of denial, it is admirable to see the arrival into office of people who understand the disturbing legacy that an authoritarian state left behind. The government has also displayed a willingness to fight select cases of corruption — like the illegal siphoning of oil (known as *huachicoleo*) — and to take assertive actions in this effort, such as the imprisonment of former Minister Rosario Robles and the indictment of former Pemex CEO Emilio Lozoya.

But perhaps the most distinctive aspect of the Fourth Transformation is its recognition of lacerating poverty and inequality. AMLO's government has placed at center stage what for decades had remained on the periphery: the plight of 53 million Mexicans who live below the poverty line, the permanent subclass of those who survive on less than a dollar day, those for whom the status quo of the past 35 years has not worked. Now, approximately 23 million of them will receive money directly from the government, without intermediaries, and their lives — at least in the short term — will undoubtedly be better. The rise in the minimum wage and a new labor reform also have the same goal: to level the playing field in a country characterized by deep disparities and entrenched inequality.

When one sees these changes, it's almost impossible not to share a feeling of elation, a sense of being at the top

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Andrés Manuel López Obrador, President of Mexico, greets supporters in August 2019.
(Photo courtesy of the Presidencia de la República Mexicana.)

of the roller coaster, arms in the air, laughing, applauding. Yet, minutes later — and it can even happen on the same day — one experiences an abrupt descent, a downward dive. The vertigo produced when the president makes substantive policy decisions based on public consultations that fail to comply with even a minimum of constitutional standards. When he attacks the Supreme Court, the National Institute for Transparency, the Human Rights Commission, civil society, or journalists who are critical of his government. When we watch with bewilderment as he promotes a series of public infrastructure projects, like the Tren Maya (a rail project through the Maya heartland) or the Dos Bocas refinery on the Gulf of Mexico, which don't have basic feasibility or environmental impact studies. Or when we contemplate the questionable logic behind a civilian airport run by the military in Santa Lucía, which also lacks proper planning, or a much-needed governmental austerity program applied in a haphazard way that is undermining the Mexican state's capacity to fulfill essential functions, especially in the health sector.

In the new government, idealism coexists with ineptitude, good faith with bad information, a sense of honor with improvisation, integrity with ignorance, good intentions with bad results. The López Obrador team is hobbled by a profound lack of knowledge regarding how public administration works, the norms that govern it, and the constitutional guidelines that define and limit its scope. The learning curve is proving to be steep, and in the meantime, the best word to defines the times is "uncertainty."

Uncertainty among investors and economic actors regarding the government's plans to rescue the state oil company, Pemex, and how the disbursement of unsupervised public funds to social programs will affect the budget. Uncertainty about how to finance massive redistribution with paltry economic growth predicted for this year. Fears about private and foreign investment plummeting if the new trade deal negotiated with the United States and Canada is not enough to jumpstart economic recovery. Fears that the new government will unravel past reforms in key areas, scaring off foreign and domestic capital in the face of renewed statism. Uncertainty among public sector employees about whether the severe austerity measures are cutting fat but also muscle, making their jobs impossible.

Uncertainty about the political and clientelistic networks that Morena social programs could produce, as well as the impact of discretionary cash outlays without intermediaries — 350 billion *pesos* (about $1.8 billion dollars) distributed in 20 new programs, 19 of which do not have operating procedures. Uncertainty among working

López Obrador discusses plans for the Tren Maya.

Photo courtesy of the Presidencia de la República Mexicana.

Photo by Jorge Guerrero/AFP via Getty Images.

Accused in 2017, former Pemex CEO Emilio Lozoya was indicted under AMLO in 2019 and arrested in Spain in February 2020.

women in the face of the cancellation of child care facilities at the national level as part of the austerity measures. Uncertainty about whether the continued militarization of public security through the creation of the National Guard will indeed bring about the peace promised in the campaign. Uncertainty that opens opportunities but also produces costs, grievances, and paralysis. Uncertainty that is a sign of remodeling, but also of disorganization, improvisation, and the clear reconcentration of power in the hands of the president.

Thwarted Growth, Continued Cronyism

The majority of the electorate supported López Obrador in last year's race because his diagnosis corresponded with a daily reality punctuated by violence, corruption, and insecurity. A country governed by a political and economic class that extracted bribes, offered contracts to their cronies, privatized public goods, siphoned off public resources for personal gain, and failed to reform themselves despite repeated warning signs that they need to do so. Over the past 30 years of structural reforms, Mexico's political and economic elites did not create wealth to distribute it better, they did not depoliticize the justice system, they did not limit corruption, they did not promote transparency or accountability, they did not seek to make the economic system more inclusive or the political system more representative. The result of not having modernized Mexico sufficiently or for the majority of its people is the empowerment of López Obrador, who rode into office promising to accelerate economic growth, end crony capitalism, and put the poor first.

The record so far is decidedly mixed. Rating agencies, independent analysts, and even the Banco de México are sounding the alarm in the face of trends on the economic front that do not bode well. Markets and investors are punishing López Obrador's team for the plans it has presented and the direction it is taking. The government's "rescue" of Pemex that is creating a massive hole in the budget and could drag down the rest of the economy if the company's debt is downgraded. The cancellation of the Texcoco airport at a huge financial cost, along with the message that the president — and not the legal framework — would determine the rules of the game. The improbability that the Tren Maya project and the Santa Lucía airport can function as neo-Keynesian detonators of growth. An economic contraction that is negatively impacting job creation and tax revenues. And a fundamental question: How can a promised redistribution occur without economic growth?

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Photo by Emmanuel Santos.

The refinery at Dos Bocas, Tabasco, Mexico, is slated to undergo a massive expansion.

A big part of the problem — and one that explains why López Obrador is in economic trouble — is what I call the "oil obsession" of the Fourth Transformation: a gamble on "re-petrolizing" the economy by turning Pemex, once again, into an engine for growth. That explains the massive investment in the state oil company and the refinery in Dos Bocas. But this strategy is probably a bad bet: it turns back the clock, trapping Mexico in a paradigm of the past, before the country had turned into a manufacturing powerhouse, before the world started gravitating towards renewable energy. In this context, it's probably not a good idea to jeopardize economic stability by injecting scarce resources into refining oil, an expensive and not particularly lucrative proposition. It's not a good idea to assign contracts in a discretionary and opaque fashion in the energy sector again. Markets are wary because this strategy doesn't seem to be rooted in reality, budgetary constraints, evidence, or best practices.

The same criticism applies to the Tren Maya and the Santa Lucía airport, mega-infrastructure projects that will allegedly detonate growth, promote investment, create jobs. But justifying and supporting these projects is not an act of rationality, it is an act of faith: there are no official studies or master plans that provide evidence to the government's claims. And what we do know is troubling. According to a recent evaluation carried out by the Mexican Institute for Competitiveness and international comparisons of similar projects, the Tren Maya will end up costing between four and ten times more than what the government has projected, making it financially unsustainable without long-term subsidies. As for the Santa Lucía airport, major international aviation experts have underscored its unfeasibility, given that there is not enough airspace in the Valley of Mexico to allow for the coexistence of two major airports: the one we have today and the one López Obrador insists on building.

And in assigning public works and public projects to handpicked private conglomerates and businessmen, López Obrador perpetuates Mexico's "crony capitalism." Crony capitalism is not based on competition, but obstruction; it is a scaffolding of business and labor privileges, favors, "national champions," public and private monopolies in crucial sectors — telecommunications, financial services, transportation, energy — that imprisons the economy and renders it inefficient, a mixture of state capitalism and oligarchic capitalism that distorts the markets and weakens public confidence in them.

During his campaign, López Obrador had promised to separate political power from economic power. He had promised to dismantle the mafia that currently held sway. These were the Fourth Transformation positions for which many citizens voted, and it's why so many are bewildered by the decision to empower, protect, and give even more business to Ricardo Salinas Pliego, the most emblematic example of crony capitalism that AMLO promised to fight.

But instead of being investigated, Salinas Pliego will be protected. Instead of being regulated, he will be propped up. He is a member of the new government's business advisory council, which he will use to explore new business opportunities. And he will be in the company of others known for their corrupt and oligopolistic practices, like Olegario Vázquez Raña and Carlos Hank Rhon. Now, by "direct invitation and without a contract," AMLO has decided that Salinas's Banco Azteca will be responsible for distributing social assistance from the state by means of debit cards. Just like that, without any sort of transparent and open bidding process. The decision to give Banco Azteca the contract is a strictly political decision, and that's how it should be interpreted.

And that is why it's so questionable and so contradictory to what AMLO promised in his campaign. It's against the best practices that this government should promote, and it favors the economic concentration and cronyism that this government should confront. In the annual index of crony capitalism published by The Economist, Mexico ranks seventh, after Russia, Malaysia, Singapore, Hong Kong, and the Philippines. We even rank among the world's top economic systems in which the owners of capital appropriate most of the wealth, with a significant portion of the profits being created via extraction, not innovation. Mexico is maintained by a suboptimal version of capitalism that is based not on competition or productivity, but on favoritism and the concentration of wealth.

As Gerardo Esquivel, one of the brightest minds behind the Fourth Transformation, has explained, 21 percent of Mexico's income goes to the richest 1 percent, and 64.4 percent of all the wealth in the country belongs to the richest 10 percent. In 2002, the wealth of Mexico's 16 richest billionaires represented 2 percent of the gross domestic product; in 2014, this figure rose to 9 percent. And the first four places are held by men who have made their fortunes in private sectors that are granted contracts and/or regulated by the public sector — men like Ricardo Salinas Pliego and Carlos Slim.

These men are the beneficiaries of a type of dysfunctional capitalism that rewards cronies while squeezing the general population. In the campaign, AMLO said that his government would tackle entrenched interests, but it seems like he is favoring them, yet again. He does not talk about regulation, promotion of competition, taxes

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Ricardo Salinas Pliego with Enrique Peña Nieto at a celebration of Banco Azteca, October 2017.

Photo courtesy of the Presidencia de la República Mexicana.

on capital gains, tax reforms — measures to dismantle crony capitalism. Instead, we are seeing him protect vested interests, shield business groups, give new opportunities to the privileged few in a country of "winners" where the same people always win. He is not taking down the mafia in power — he's making it his own.

So how do we explain the propensity of the Fourth Transformation to produce these self-inflicted economic wounds? Today, Mexico has a president who has fired a broad swath of civil servants with technical expertise, who is weakening regulatory bodies and organizations that have provided autonomous evaluations of government policies. A president who on an almost daily basis makes fun of economists, disqualifies quantitative methods, disdains evidence, and proclaims that he has "other data." A president who doesn't want to regulate monopolists or end corruption, but rather strike his own deals based on a notion of empowering "national champions." And by doing so, López Obrador displays the Achilles heel of his transformative vision. The real problem with the Fourth Transformation is not populism, it's ignorance.

Ignorance about how the state works and the market operates. Ignorance about how to put together a budget and the variables that intervene in its elaboration. Ignorance about the link between growth and tax revenues, certainty and investment, regulation and competition, competition and productivity, social policy and the informal sector, monopolies and rent-seeking, capitalism and sub-par economic performance. López Obrador's "economic illiteracy" would be less troubling if he recognized it and listened to his economic advisors. But in Mexico today, there isn't a functional cabinet; there's a one-man show, and it's run by someone who refuses to face the reality being presented to him: that government funds won't be enough to save Pemex; that more cuts and government austerity won't be enough to finance his social programs; that there is no way to attract and maintain investment if the rules of the game change every day; that extreme and badly implemented austerity is bleeding out the state, dismantling it, and damaging its operational capacity.

This dysfunction is the product of a personal style of governance in which data have been replaced by instinct, autonomous studies by ideological inclinations, reason by faith, rules by presidential discretion. In this government, you don't have to measure, you have to believe. You don't have to understand or evaluate public policy, you just have to watch the *conferencia mañanera*, AMLO's daily morning press conference, because that's where it's designed. As former Minister of Finance Carlos Urzúa decried in his letter of resignation, "the problem with this government is its willfulness."

A wealthy, walled community (right) carved out of the low-income Santa Fé neighborhood in Mexico City.

Photo by Oscar Ruiz (Agent: Claudia Shelley). Courtesy of Banamex/Publicis México.

Photo courtesy of the Presidencia de la República Mexicana.

The *mañanera*, López Obrador's morning press conference, February 2020.

A One-Man Show

In order to transform Mexico and do so rapidly, the president has resorted to a political strategy based on the concentration of power in his hands, dismantling many of the checks and balances that Mexico had struggled to construct over three decades. López Obrador insists that institutions created during the "neoliberal" period of the past 30 years constitute an obstacle to the Fourth Transformation he envisions. He intends to govern "without intermediaries" and establish a direct relationship between the people and their leader.

López Obrador's governance style is based on the aforementioned daily presidential press conference in which he lambasts "neoliberalism" for producing all of Mexico's ills, skewers the "elitist" press, announces judicial investigations of public officials, and promotes his policies. The mañanera defines the public agenda and serves as a forum where the president explains his priorities and also berates the institutions he believes have not served the country well. He has used it to criticize the judiciary, civil society, the media, autonomous regulators, and members of the opposition. According to the president's narrative, an ever-growing array of actors have thwarted real democracy and enabled corruption that needs to be exposed and expunged.

Every morning, the president stands in front of the press, giving morality lessons, citing the Bible, providing facts and figures, but also disseminating commandments. He constructs a political persona capable of transcending the role of elected official; he aspires to be Mexico's spiritual guide. The press briefing is not an exercise in government accountability or a tribute to transparency; it is more like a sermon or a mass. López Obrador does not use it to speak of laws or rights, but to celebrate virtues and condemn vices.

The presidential morning ritual is a call for the people to participate in an epic crusade against corruption, the mother of all evils. Arguing that corruption corroded government institutions prior to his arrival into office, AMLO has proceeded to dramatically reduce their budgets, question the existence of the National Institute for Transparency and the Human Rights Commission, name unconditional supporters to key public posts, manhandle the designation of federal regulators, and cut

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off public funding to all NGOs. He has also threatened to "pack" the Supreme Court by increasing its size from 11 to 16 members, along with other measures ostensibly intended to "clean up" the judiciary, which will lead to more executive control over this branch of government. The "fight against corruption" has become the political justification for major decisions in virtually every aspect of public life. It is used as a political weapon to exhibit AMLO's enemies, as a tool to undermine resistance to his proposed policies, and as a way to justify decisions that would otherwise elicit more scrutiny.

Arguing that the Federal Police were corrupt, López Obrador reformed the Constitution in order to create a National Guard, a militarized force to be assigned all public security tasks, which has been severely criticized by domestic and international organizations because of the unprecedented power it grants these armed forces. Arguing that corruption had infiltrated state-level governments, he created the figure of "delegates," named by him, who will distribute funds for social programs throughout the country, jumping over elected officials at the local level. Arguing that corruption had captured autonomous regulatory entities in energy and telecommunications, AMLO handpicked technically inexperienced but loyal deputies. Under the rubric of the fight against corruption, the president has amassed and centralized a great deal of discretionary power.

Despite the potentially negative consequences of his policies, López Obrador's popularity underscores the impact of charismatic leadership on Mexico's fragile democracy. Since the country's electoral transition in 2000, the emphasis among reformers had been on building institutions that would assure accountability, transparency, and autonomy. Now, the president is attempting to create a political base built on the cult of personal infallibility and a direct connection to the "people." Mexican democracy could thus cease to be an evolutionary process that seeks to promote what is still needed: checks and balances, federalism, the promotion of transparency, the fight against clientelism, and the depoliticization of the judiciary.

López Obrador's so-called Fourth Transformation of Mexico seems to be headed toward a restoration of what Mexico experienced for more than 50 years under the Partido Revolucionario Institutional (PRI, Institutional Revolutionary Party): dominant party rule headed by an omnipresent, all-powerful president who governs with few restraints. The political conditions that allowed presidentialism to emerge and flourish are in place again, and AMLO is using them to his advantage.

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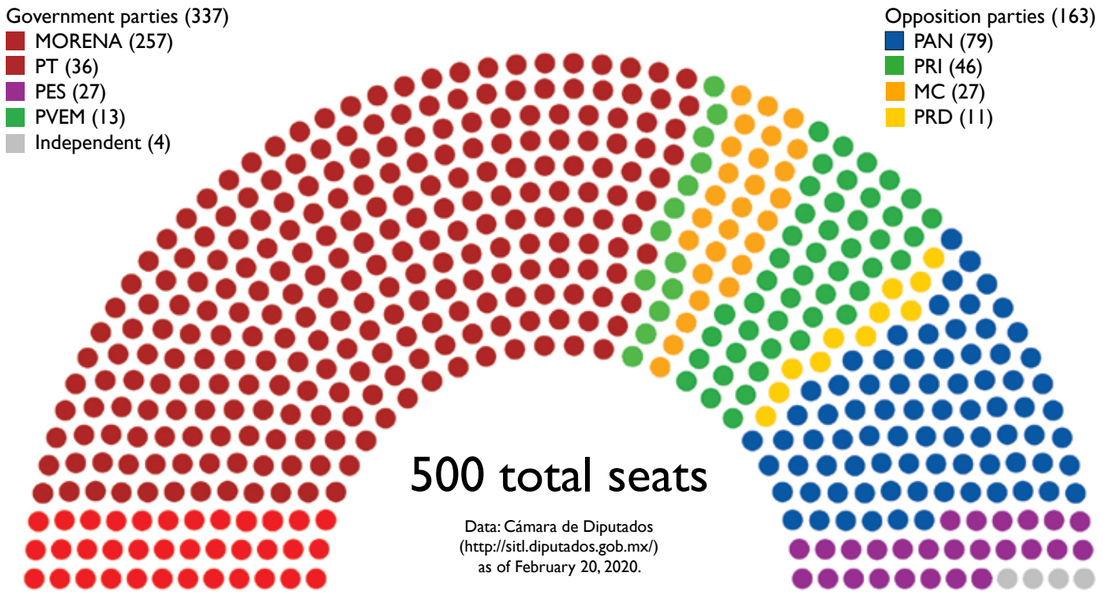
A Central American migrant child plays while Mexican National Guards detain her family on the border with Guatemala, January 2020. (Photo by Marco Ugarte/AP Photo.)



López Obrador's governing coalition holds a super-majority in Mexico's Chamber of Deputies.

López Obrador's "Fourth Transformation"

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His party and its coalition allies have an absolute majority in Mexico's Congress, with more than 300 seats out of 500, and a relative majority in the Senate. After 24 years of a divided Congress, AMLO enjoys a unified government, with the capacity to pass laws, approve the budget, and rule with little opposition. In tandem with the smaller parties that formed part of his electoral coalition, he has enough votes to modify the Constitution and veer away from the liberalizing path forged by his predecessors. Although the PRI and the PAN (Partido Acción Nacional, National Action Party) retain a certain presence in the legislature and the control of a number of governorships, the López Obrador government coexists with a decimated and discredited opposition that is finding it difficult to regroup, as many flee to join the ranks of Morena. And given its conversion into a "catch-all party," Morena seems to be en route to become a new version of the old PRI, a reinvented version of a hegemonic party whose success and longevity reside in its capacity to accept disparate political factions under its pragmatic umbrella. Clientelism and corporatism held the PRI together, and Morena has not signaled that it will break with those practices; it is positioned to emulate and embrace them.

The most visible enactment of this vision is the use of new social programs based on direct cash transfers to shore up political support. Low-income beneficiaries are receiving scholarships, pensions, and disbursements planned for an intended universe of 23 million people, a network of recipients who will be linked to the president in a personal fashion. Social programs are turning López Obrador into the "Great Benefactor," the philanthropist, the guarantor, the political beneficiary of the state's largesse. Morena, the president's party, never fully operated as such; it's more of a disparate socioeconomic coalition held together by the force of his leadership and charisma. In order to maintain discipline and ensure electoral victories, AMLO needs to be in perpetual motion, traveling throughout the country, doling out benefits, shoring up his base through increasingly expensive and expansive new social programs. Addressing the short-term needs of the poor also allows the president to address the electoral imperatives of his party.

The president's supporters applaud the return of an omnipotent, morally unimpeachable leader, capable of enacting change in a country that is clamoring for more social justice and fewer privileges. Nonetheless, those who fought to dismantle the hegemony of the PRI and create a framework for incipient checks and balances view current trends towards de-institutionalization in Mexico with concern. López Obrador is centralizing power without assuring that it is used more transparently or more democratically.

In *The Federalist Papers*, James Madison argued, "In framing a government…, the great difficulty lies in this: you must first enable the government to control the governed; and in the next place oblige it to control itself." This is the challenge that López Obrador has failed to address, the task he has not undertaken and may not want: how to domesticate his own power; how to prevent abuses by his own government; how to submit to rules, procedures, and constitutional restraints; how to sanction corruption when it occurs in the ranks of his own party, as is the case with Manuel Bartlett, a cabinet member accused of illegal enrichment; essentially, how to fortify institutions that assure "horizontal accountability" and sanction and control power when it exceeds its constitutional reach.

In the AMLO era, the president has posited that the containment of his power should be his own conscience, his own sense of honor. But the modern state was created to domesticate power through the de-personalization of its use. The current president is returning the country to the era of the imperial presidency, where he controls and embodies the state. As a result of his actions, Mexico may end up with a strong president at the helm of a weak, dysfunctional state. López Obrador is changing Mexico, but he may be turning it into a less modern, less democratic nation.

Institutions, Not Individuals

López Obrador's victory has meant a seismic change for Mexico, altering the party system and, to an unpredictable extent, the existing economic model. The future of the change — beyond what I've mapped out here — will depend on how and for what purpose López Obrador uses his power, as well as on the correlation of forces within his cabinet, in Congress, in the governorships, and in the institutions that should provide constraints to the executive branch.

For those worried about the fate of Mexico's dysfunctional democracy, there are troubling signs ahead. An important segment of AMLO's electorate and the left-leaning intelligentsia has afforded him a sort of intellectual amnesty, wherein much of what he says or does — regardless of its lack of viability or congruence — is justified. Time and again, he has promised to submit key policy issues to public referendum, a practice that could push the country towards a position of "majoritarian extremism," in which democracy is not viewed as an inclusive and negotiated

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The government celebrated López Obrador's first year in office with a day-long anniversary party in Mexico City, December 2019.

Photo courtesy of the Presidencia de la República Mexicana.

process, but as a constant confrontation between the popular will and those who oppose it, including institutions that he has openly vilified, such as the Supreme Court. In his daily narrative, he has portrayed institutions as obstacles, while promising to return power to the people.

Yet, much of what AMLO offers — including an end to corruption and violence — will require significant institutional transformations. The change he augurs cannot occur without modifications to institutions that were created for dominant party rule, not for democracy or economic openness. Corruption is systemic, impunity is assured, institutions can be manipulated by the president and the ruling party, cronyism is pervasive, and the pact of impunity has been signed by all parties, Morena included. Mexico will simply replace one unaccountable party with another if the country does not promote what political scientist Guillermo Trejo calls an "accountability shock" — an agenda focused on transparency, accountability, institutional remodeling, checks and balances, and the protection of individual rights.

Many of these issues have been at the center of actions in which Mexican civil society has engaged, including the oral trials system, the creation of an independent Attorney General's office (autonomous from the president and his party), the elimination of discretionary budgets disbursed with political intent, the establishment of a National Anti-Corruption System with specific laws and procedures, the strengthening of autonomous regulatory entities that promote competition, the initiative to reduce public financing for parties by 50 percent, the effort to demilitarize Mexico by establishing civilian controls over the National Guard and creating incentives for the professionalization of the police, the struggle for the rights of women and minorities, and the ongoing struggle to contain violence, especially in light of the pandemic of feminicide.

Much of the positive change that Mexico has experienced over the past 20 years is the result of pressure from below, fomented by an increasingly vibrant and demanding civil society, focused on human rights, political reform, and calling the political class to account. Mexico's future and the possibility of assuring democratic consolidation and an economic model capable of producing growth with equity does not depend on one man or one movement, however noble their intentions. The country's perennial problems derive from the absence of institutions that are capable of providing systemic checks and balances, transparency, and horizontal accountability.

The real risk for Mexico is not that it turns into Venezuela, but rather, that it remains the same Mexico: a clientelist, corporatist system nurtured by a state that builds patronage ties rather than citizenship; a crony capitalist political economy, only with some new cronies; revived dominant-party rule with few checks and balances; an institutional framework corroded by corruption, whose weaknesses will create incentives for renewed presidentialism. Mexico may only experience truly transformative change if the country's new leaders focus their attention on constructing the rule of law. A centerpiece of that agenda would be the establishment of an autonomous Attorney General's office, independent of the president and his party, endowed with the capacity to investigate and prosecute corruption at the highest levels. In addition, the true test of AMLO's commitment to confront malfeasance, even if it occurs within his own government, would be to pass the pending laws needed to make the National Anti-Corruption System (currently stalled in Congress) fully functional.

If Mexico is unable to construct the rule of law, even the best intentions will continue to produce lackluster results. If the "war on drugs" is not rethought by gradually returning the military to the barracks and, at a minimum, legalizing marijuana for medicinal and recreational use, the violence unleashed by the confrontation between cartels and the government will continue. The mistake, as AMLO struggles to simultaneously shake up and pacify Mexico, would be to delegitimize democracy, however misshapen it has become, and subcontract the destiny of the country to a redemptive force or a providential leader, however incorruptible he may seem.

Mexico needs a broad, pro-democratic coalition that focuses on combating impunity, promoting transparency, strengthening checks and balances, remodeling institutions, demilitarizing public security, ensuring the pending transition from clientelism to citizenship, redistributing wealth concentrated in the few in order to enable prosperity for the many. That would be truly transformative.

As the poet Juan Rulfo wrote: "It had been so long since I lifted my face, that I forgot about the sky." If Mexicans do not look upward and demand more from the Fourth Transformation, it will continue to be a roller-coaster ride and not the progressive New Deal that people deserve and many — including myself — voted for.

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Families of Ayotzinapa's 43 missing students demand justice in Mexico City, January 2020. (Photo by Marco Ugarte/AP Photo.)