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## Neo-Patrimonialism and Subnational Authoritarianism in Mexico. The Case of Oaxaca

Julián Durazo Herrmann

**Abstract:** How do subnational authoritarian enclaves emerge (or survive) in a democratic transition at the federal level? How can they endure large-scale social protests, like the one that shook Oaxaca in 2006? While federal tolerance for subnational authoritarian practices is a necessary condition, it is insufficient in itself to explain why subnational political systems sustain and eventually reproduce authoritarian practices in the first place. In this article, therefore, I focus on the internal dimension of subnational authoritarianism. I argue that, because of its reliance on two distinct sources of legitimacy, Oaxaca's neo-patrimonial domination system was able to respond to the formal democratizing pressures emanating from the federal transition without losing its authoritarian nature. This process of hybridization transformed Oaxacan institutions, but left social structures and the political dynamics that emerge from them – the sources of subnational authoritarianism – almost intact. By exploring the evolution of neo-patrimonialism and hybridization in Oaxaca from a theoretical perspective, I address the issues of change and continuity in the emergence of subnational authoritarian enclaves, in Mexico and elsewhere.

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**Keywords:** Mexico, Oaxaca, Regime Change, Subnational Politics, Neo-Patrimonialism, Hybridization.

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## Introduction

Throughout the summer and fall 2006, the Mexican state of Oaxaca experienced a long period of political instability triggered by the violent repression of the traditional teachers' demonstration in June and culminating in heavy federal police intervention in late November, which resulted in at least 17 deaths. The revolt followed the controversial 2004 gubernatorial election – marked by strong accusations of fraud – and denounced ongoing subnational authoritarian practices despite the federal transition to democracy. Repeated calls to resign notwithstanding, Ulises Ruiz Ortiz, the state Governor, remained in power and seems headed toward the normal conclusion of his term in December 2010 (Recondo 2007a). How do subnational authoritarian enclaves such as this one emerge (or survive) in a democratic transition at the federal level? How can they endure large-scale mobilizations, like the one that shook Oaxaca in 2006? In this paper, I try to answer these questions by going beyond a short-term analysis and taking Oaxaca's profound social and political dynamics into account.

Part of the answer lies in the relationship between the subnational authoritarian elite and key federal actors – both the government and political parties. Given the permanent and legitimate access channels federal actors enjoy in subnational political systems, subnational elites must elicit – at a minimum – federal tolerance for their practices if an authoritarian enclave is to survive and consolidate. This dimension is rich in insights and has already been widely studied (see Moch Arias 2002; Gibson 2005; Giraudy 2010 in this issue). However, federal tolerance for subnational authoritarian practices is insufficient in itself to explain why subnational political systems sustain and eventually reproduce these practices in the first place. In this article, therefore, I focus on the much less studied internal dimension of subnational authoritarianism. I seek to determine to what extent the dynamic interaction between subnational political actors and institutions contributes to the emergence and consolidation of authoritarian enclaves. I thus address federal processes inasmuch as they affect the subnational political equilibrium, but the study of the role of subnational politics in the federal transition to democracy is beyond the scope of this article.

I argue that, because of its reliance on two distinct sources of legitimacy, Oaxaca's neo-patrimonial domination system – established as the Mexican revolutionary regime consolidated in the 1920s and 1930s – was able to respond to the formal democratizing pressures emanating from the federal transition without losing its authoritarian nature. This process of hybridization certainly transformed Oaxacan institutions, but left both social structures and the political dynamics that emerge from them almost intact. The sources of subnational authoritarianism were therefore never really

called into question, even though the political environment was thoroughly transformed. The study of subnational authoritarian enclaves must thus simultaneously address the questions of change and continuity.

In the following section, I introduce the three central concepts of my analysis: subnational authoritarian enclaves, neo-patrimonial domination, and hybridization. After presenting a brief overview of the state of Oaxaca, I show how the region's political history allows us to understand the emergence and consolidation of a subnational authoritarian enclave despite the federal transition to democracy. I divide my analysis into four distinct periods: the rise of the Oaxacan neo-patrimonial domination system within the framework of Mexico's post-revolutionary regime, Oaxaca's cycles of political upheaval and restabilization between 1946 and 1986, the hybridization process of the 1980s and 1990s, and finally the years leading to the 2006 crisis and its aftermath.

## The Conceptual Framework

In this article, the term "subnational authoritarian enclave" does not only refer to the policy arenas an authoritarian regime withholds from open public debate and contestation as a condition for its continued engagement in the political transition (Garretón 1989), but has a precise territorial dimension as well. While I do not deny the importance of municipal dynamics in explaining local political developments (cf. Fenwick 2010 in this issue), space and time constraints do not allow me to consecrate them much attention in my analysis. I thus refer exclusively to federated states, such as Oaxaca. For its part, neo-patrimonialism is a form of social domination. According to Max Weber (1972 [1922]), social domination is a hierarchy system that determines the origins and the nature of the governing class in a given polity as well as the general features of how authority is exercised. The determining aspect of all domination systems is the type of legitimacy they rely on, since it shapes the form of obedience that is called for.

In the case of neo-patrimonialism, a mixed type of domination that brings together under a single government both modern (usually urban) and traditional (mostly, but not exclusively rural) social groups, its sources of legitimacy are simultaneously legal and traditional. While legal legitimacy is based on rational, abstract, and universal rules that give rise to the rule of law, traditional legitimacy emerges from historical conceptions of political order that assign relatively static hierarchical positions to the various political actors (Weber 1972 [1922]; Eisenstadt 1973).

Neo-patrimonial domination systems thus combine arbitrary power, tradition and rule of law in heterogeneous fashion. Authoritarian practices are

thus a significant component of neo-patrimonial rule. The actual boundaries between legitimacy types are vague and historically determined for each case. Furthermore, despite the penetration of universal values and abstract characteristics of modernity in traditional settings, neo-patrimonialism does not represent in itself a transition stage between tradition and modernity (Médard 1991).

An important feature of neo-patrimonial systems is their permanent need for political mediation. Governing such heterogeneous society requires the presence of an actor – or an institution – capable of interacting with different social sectors while simultaneously meeting their divergent conceptions of legitimacy. When only one actor is capable of achieving this feat, the opportunity emerges for neo-patrimonial elites to monopolize political communication within their society, thus obtaining substantial political rents, not the least by presenting themselves as an indispensable factor in local governance (Eisenstadt 1973).

This same social heterogeneity forces neo-patrimonial elites to construct large social coalitions, including the maximum possible number of both traditional and modern sectors in order to actually rule. These coalitions are complex and fragile by nature, since they depend on a continuous flow of material resources to survive. Neo-patrimonialism is therefore prone to political crises – although most frequently they result in personnel, rather than in structural change (Knight 2005).

Once the transition starts at the federal level, neo-patrimonial subnational systems face significant pressure to democratize as well (Andrade Sánchez 1997; Ochoa-Reza 2004; Durazo Herrmann 2007). These pressures can lead them to make some concessions and even to engage in a genuine political opening. In many cases, however, neo-patrimonial elites can adjust, adopting formally democratic reforms while continuing to pursue authoritarian practices, at least over some aspects of the subnational political system (Gervasoni 2010 in this issue). This long and ambiguous process of political adaptation and restructuring is known as hybridization and allows for – and serves to legitimize – the coexistence of formally democratic political institutions with authoritarian practices. Hybridization emphasizes a strictly procedural conception of democracy, is heterogeneous in nature and its results are contingent on the subnational political equilibrium (Karl 1995; Diamond 2002; Recondo 2007b). As an expression of subnational resistance to regime change through resort to conflicting political logics, hybridization is characteristic of subnational neo-patrimonialism.

Although quantitative methods have often been used to study subnational political regimes (Gervasoni 2010 in this issue; Giraudy 2010 in this issue; Montero 2010 in this issue), in this article I proceed from a qualitative

perspective that simultaneously recognizes the analytic value of history as the structural framework of politics and the role of agency in determining specific political outcomes. I therefore engage in a thick historical analysis that pays close attention to the evolving interaction between political institutions and actors (Kohli et al. 1995; Bunce 1999). Such an argument should demonstrate that neo-patrimonial features – as modified by hybridization – continue to be essential elements of Oaxaca’s authoritarian regime.

## Oaxaca: a Heterogeneous Society

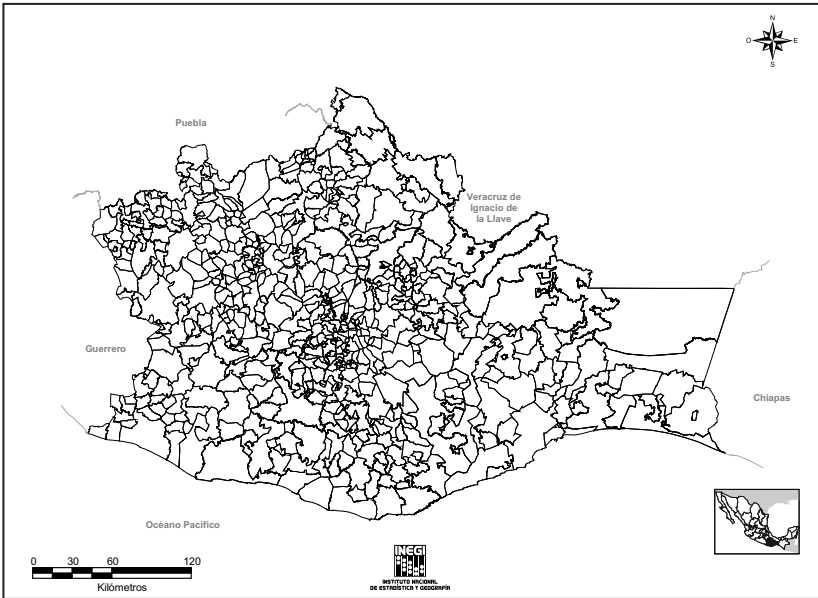
In studying Oaxaca’s diversity, three key dimensions emerge: geography, demographics, and economics. The cleavage lines that emerge from each of these dimensions superpose with one another and give rise to an extremely complex society.

From a geographic perspective, Oaxaca is isolated from both central Mexico and from its neighboring states by imposing mountain chains, which also dissect its territory, giving rise to a number of distinct subregions and territorial districts. At the political level, this geographic diversity translates into a severe territorial fragmentation: Oaxaca comprises 570 municipalities of all sizes, including two cities over 100,000 inhabitants as well as several municipalities containing no more than a couple hundred persons (INEGI 2005).

In demographic terms, Oaxaca is equally diverse. Out of 3.5 million inhabitants, the rural population accounted for 53 percent in 2005 – against a national average of 24 percent. Moreover, 1.25 million people (36 percent of the total) speak one of 15 indigenous languages. The demographic weight of the various indigenous groups is also unequal and the more numerous groups do not enjoy territorial continuity. It must also be noted that an important proportion of Oaxaca’s rural population is not indigenous.

Oaxaca’s urban population – a mere 47 percent of the total – is also diverse. The state largest city is its capital, Oaxaca City, with close to 300,000 inhabitants. Tuxtepec, with 143,500, and Juchitán, with 87,500 follow far behind. The state’s other urban centers are actually quite small. Nonetheless, each of these cities serves as a subregional service and administrative center, thus sustaining geographical fragmentation (Martínez Vásquez 2004a; INEGI 2005).

Figure 1: Oaxaca's 570 *municipios*



Source: INEGI, Marco Geoestadístico Municipal 2005, online: <[www.cuentame.inegi.org.mx](http://www.cuentame.inegi.org.mx)>, INEGI 2008, online: <[www.inegi.org.mx](http://www.inegi.org.mx)>.

Historically, Oaxaca's economy has been dominated by the primary sector (agriculture, forestry, fisheries). In contrast with the rest of Mexico and because of its remote and difficult geographical conditions, communal property – of both land and resources – is the dominant property form in Oaxaca, especially among indigenous communities. This reflects the state's historical isolation from Mexico's main economic trends (Flores Leyva and Marini Zúñiga 2004). The ambiguity of most communal titles – many inherited from colonial times – and the small size of most properties (less than one third of the lots have more than two hectares) give rise to many territorial disputes. The small territorial extension and the communal nature of most Oaxacan municipalities mean that most of these land conflicts are also municipal border conflicts. These conflicts tend to be intense and have historically been an important source of violence in the state (Moreno Derbez 2004; Frutta Wass 2007).

During the second half of the twentieth century, the service sector (traditionally trade, now also tourism), concentrated in the cities (especially Oaxaca City), became increasingly important. In contrast, Oaxaca's industrial sector – relatively prosperous before the Mexican Revolution – was unable to compete with central Mexico's industrial powerhouses, especially after the effective

abolition of internal trade barriers. Oaxacan industry thus entered into a long period of stagnation, never exceeding 18 percent of state GDP. Beginning in the 1950s, almost all important investment projects were confined to the federal public sector (most notably in the oil industry), were very localized and had relatively few linkages to the local economy. They thus contributed to the fragmentation of the Oaxacan economy (Miguel 2004).

Oaxaca's poor physical and economic integration, coupled with industrial stagnation, made the commercial sector the state's most dynamic activity. Specializing both in exporting local primary products to central Mexico and in importing manufactured goods hence, the commercial elite, based in the subnational capital, created the only solid economic network to serve the entire state (Martínez Vásquez 1990).

## Classical Neo-patrimonialism in Oaxaca

At the end of the Mexican Revolution (1910-1920), both Mexico and Oaxaca had a new political regime. Paradoxically, in Oaxaca – as in other regions – the Revolution became the source of both legal and traditional legitimacy, thereby paving the ground for the emergence of a neo-patrimonial domination system. On the one hand, the revolutionary Constitution of 1917 became the basis of the Mexican legal system and an indispensable factor in the institutionalization and consolidation of the post-revolutionary regime, both at the federal and subnational levels. On the other hand, the dense network of personal ties some military commanders created in certain regions survived the institutionalization of the new regime and became the source of traditional forms of authority (Hernández Chávez 1993; Knight 2005).

In Oaxaca, seeking to stabilize the subnational political system, Governor Genaro Vásquez forced the integration of all state political organizations into the Confederación de Ligas Socialistas de Oaxaca in 1926 – a subnational forerunner of the Partido Nacional Revolucionario, itself the predecessor of the Partido Revolucionario Institucional (PRI), founded in 1929. Furthermore Governor Vásquez created a single Oaxacan peasant confederation under his helm. The Governor thus automatically became the natural mediator in all agrarian conflicts – by far the main source of social violence in the state (Arellanes Meixueiro 2004).

Subsequent governors followed the example, creating a complex network of social and political intermediation channels centered in the subnational government and based on a clientelistic exchange of material and symbolic goods against unconditional political support. In the 1930s, the advent of the PRI and the Mexican corporatist system – which largely integrated these subnational networks – strengthened the subnational govern-



ment's role as the state's prime political intermediary, both within the state and between the state and the federation (Dalton 2004).

After the Revolution, Oaxaca – as the rest of Mexico – adopted an electoral system based on universal, secret and formally, if not actually competitive suffrage to elect the state Governor, the members of the subnational Congress and the 570 mayors and municipal councils. Moreover, from the 1920s onward, the electoral calendar was strictly observed, although in most races the PRI was the only party to field a candidate. In the cities, real opposition emerged occasionally. This was particularly the case in Oaxaca City and Juchitán from the 1970s onward, where local coalitions of workers, peasants, and students emerged (the *Coalición de Obreros, Campesinos y Estudiantes de Oaxaca* – COCEO and *Coalición Obrero Campesino Estudiantil del Istmo* – COCEI, respectively). In 1980, and again between 1989 and 2004, COCEI won the Juchitán mayoral race. The Partido Acción Nacional (PAN)<sup>1</sup> won Oaxaca City in 1998, and was succeeded by the *Convergencia Democrática*<sup>2</sup> in 2001 (Rubin 1997).

However, in most rural municipalities the electoral process was simply a formalization of traditional authorities' selection practices (*usos y costumbres*), as they have evolved historically. In these cases, the PRI's role was to incorporate these customs into the formal political system and to grant them legal recognition by automatically selecting the traditional authorities as its local candidates in exchange for unanimous support in all other elections (subnational as well as federal) (Martínez Vásquez 2004b; Recondo 2007c). In so doing, the Oaxacan PRI acted as an intermediary, rather than as a party, ensuring the translation of the formal political system's demands into institutions and procedures acceptable to rural and indigenous communities while simultaneously gathering political support for the regime. To guarantee the reproduction of its mediation network, the PRI relied heavily on its revolutionary and nationalist mystique, as well as on the clientelistic distribution of material resources (Rouquié 1998; Martínez Vásquez 2004b).

In formal terms, both modern and traditional municipal structures are modeled on Spanish colonial institutions. It is the integration of religious duties and the extra-legal selection processes (seniority, cooptation, previous participation in municipal government, etc.) that distinguish traditional municipalities both from the modern ones and from each other. The diversity of Oaxacan traditional authority forms is enormous and in constant evolution

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- 1 The right-wing PAN was formed in 1939 in opposition to the post-revolutionary regime's social and economic policies. It soon became the leading opposition party in Mexico.
  - 2 The centrist *Convergencia Democrática* – now simply *Convergencia* – formed as a splinter party from the PRI in 1997.

(Kraemer Bayer 2004). A common feature, however, is the emphasis made in defense of the community and its interests vis-à-vis the outside world. Municipal positions are reserved for natives – usually only after performing communal and religious tasks – and function on the basis of strictly controlled contacts with both subnational and federal authorities (Recondo 2007c).

The PRI, however, never was the sole intermediary between rural communities and the state, since other viable alternatives existed. In particular, the expansion of public education after the Revolution made primary school teachers a permanent presence throughout Oaxaca (except for the smallest hamlets). The teachers' relatively high education level and their permanent links with the government and their federal union (the Sindicato Nacional de Trabajadores de la Educación – SNTE) made them the natural intermediaries between their home communities and the outside world. In addition to the educational services they provided, the teachers were often able to concentrate in their hands the relationship between communities and the government's sectoral agencies (coffee, forestry, fisheries, etc.) (Kraemer Bayer 2004). Many teachers drew political advantage from this position, facilitating their access to positions of municipal and, in some cases, even regional authority. However, the corporatist relations within the SNTE and between it, the PRI, and the federal and subnational governments facilitated the concentration of political communication links between rural communities and the outside world in a single, albeit diverse political group (Recondo 2007c).

The isolation of Oaxacan rural communities and its own inability to effectively penetrate them led the subnational government to readily accept the teachers' intermediation, provided that the clientelistic pact and the PRI's symbolic role were respected. The priority the Mexican political system assigned to order and local governance reinforced this trend (Mallon 1994; Medina 1997). Thus, despite its multiple intermediaries, Oaxaca managed to sustain a working neo-patrimonial system.

Simultaneously, the expansion of both governmental bureaucracy and educational opportunities in the cities allowed the emergence and consolidation of a small urban middle and professional class. Furthermore, the transformation of the local institute of science and arts into a full-fledged university in 1955 created a venue for intellectual reflection and protest. In urban areas, these academic institutions, the subnational PRI and municipal and legislative elections provided an arena for relatively modern forms of political competition. Over time, the professional classes dominated the PRI's formal structure in Oaxaca as well as most subnational elected offices (with the exception of the Governor, where federal intervention was always decisive) (Martínez Vásquez 1990; Langston 1996).

On the other hand, the Oaxacan merchant class took advantage of both national economic growth and local industrial weakness to consolidate its position as the dominant subnational economic elite, playing an intermediary role between local producers and their national customers and suppliers. Unlike other regions, the traders' association in Oaxaca City became a combative organization that intervened often in open politics to defend its interests (Martínez Vásquez 1990; Zafra 2004). In order to take advantage of the merchants' social network and thus ensure the clientelistic pact's penetration throughout the state, the Oaxacan PRI leadership established a coalition with the commercial elite. In exchange, Oaxacan economic policy constantly favored commercial over productive endeavors – both agricultural and industrial (López 2007).

By simultaneously controlling the political and economic arenas, this alliance was able to secure a complete intermediation monopoly with rural and indigenous communities. At the same time, it blocked the growth of the PAN in Oaxaca. Nevertheless, the federal PRI's aversion to open alliances with the business sector and its unabated revolutionary rhetoric ensured that Oaxaca's elites remained distinct from each other, thus contributing to the incomplete nature of Oaxacan neo-patrimonial intermediation (Martínez Vásquez 1990; Gibson 2005).

In conclusion, during most of the twentieth century, Oaxaca's political system exhibited some typical features of neo-patrimonial domination: major social heterogeneity gave rise to significant political and territorial fragmentation which, in turn, allowed for the emergence of distinct legitimacy logics and of a comprehensive system of political intermediation. Yet post-revolutionary Oaxaca did not have a unified ruling elite (a development prevented by the federation and its political and corporatist structures), but rather an uneasy alliance between the political elite – itself divided between the professional urban class and the rural teachers – and the economic elite – in this case, the commercial elite. As we shall see below, this combination prevented not only the emergence of an autonomous state at the subnational level, but also the consolidation of a stable political system.

## Questioning the Neo-patrimonial Model

After 1926, Oaxaca enjoyed a period of relative political stability – social violence, often related to communal land conflicts, did not subside, however (Sorroza Polo 1994; Moreno Derbez 2004). In time, the alliance between the subnational political elite and the merchant class began to show its limits.

In 1946, Governor Edmundo Sánchez Cano's attempt to impose a tax on commercial transactions triggered a protest wave. Led by merchants, the

opposition included students and the local media as well. When the federal government disallowed him in January 1947 in face of growing dissent and sent in the army to calm the situation, Sánchez Cano resigned. In 1952, Governor Manuel Mayoral Heredia again tried to impose a subnational tax, ostensibly to finance Oaxaca's agricultural modernization. Confronted anew with the merchants' opposition, the Governor sought support among the state peasant organizations. As the conflict festered and a confrontation between the police and the demonstrators left two people dead, the army intervened again and Mayoral Heredia was also forced to resign (Murphy and Stepick 1991; Dalton 2004).

These two incidents clearly show the subnational state's lack of autonomy vis-à-vis the local commercial elite. Thereafter, the Oaxacan government sought not to alienate the merchants, although this meant becoming entirely dependent on federal fiscal transfers. Under these conditions, Oaxaca's neo-patrimonial regime seemed to stabilize again between 1952 and 1971.

During the 1970s, however, the legacy of the 1968 national student movement transformed Oaxaca's political arena. Students, so far only secondary political actors, organized independently and formed a coalition with other marginal actors (mostly workers and peasants), creating COCEO in Oaxaca City in 1971 and COCEI in Juchitán in 1973. In the long term, COCEI would have the greatest political impact, but at the time, it was COCEO that triggered the new crisis.

COCEO's growing ascendancy in Oaxaca's academic institutions – first the student union, then the university's collegiate bodies as well – and its efforts to mobilize workers and peasants – in particular, by providing free legal assistance – worried the state's neo-patrimonial elites, who saw a threat to their role as exclusive political mediators. Governor Manuel Zárate Aquino responded by reactivating the PRI's subnational corporatist networks in an attempt to coopt COCEO or, at least, some of its leaders. When COCEO proved resilient, the governor resorted to repression.

In 1977, when Oaxacan police violence gained national notoriety and the conflict threatened to spread outside the state, the federation intervened once again and forced Governor Zárate Aquino's resignation. This time, the commercial elite played a passive role, demanding a return to law and order, but without explicitly supporting the subnational Governor. In an attempt to achieve durable stability, the federation recognized – and compelled as well the subnational government to recognize – COCEO and COCEI as legitimate political interlocutors, thereby granting them a formal place in the system in exchange for their public allegiance to the regime (Martínez Vásquez 1990).

COCEO faded with time, but COCEI managed to consolidate and became a model of political organization throughout Oaxaca, with its indigen-

ist rhetoric and its focus on strictly local problems, including land ownership and the exploitation of natural resources. Many of these new organizations were also quietly, but effectively supported by the Catholic Church (Esparza Camargo 2004). While only a few of these new organizations entered the electoral arena – and none enjoyed COCEI's success – they all entertained an ambiguous relationship of rhetorical conflict and material dependence with the subnational government. The intensity of the conflict, however, varied according to each particular organization and each governor's cooptation abilities (Rubin 1997; Hernández Díaz 2004).

Again, although the neo-patrimonial intermediation monopoly was explicitly questioned, the regime found sufficient resources to minimize the threat. The absence of effective opposition parties, together with the limited scope of the new social organizations, further reinforced the PRI's and the subnational government's role as political intermediaries.

In the late 1970s, a guerrilla movement also emerged in Oaxaca. Its presence, however limited, simultaneously increased the federal and subnational governments' disposition to negotiate with groups openly recognizing the regime and its legal framework, but also their penchant to severely repress those who did not. Since then, Oaxaca featured a permanent element of political violence and repression that further inhibited the emergence of a moderate leftist opposition (Martínez Vásquez 1990).

Traditionally an essential component of the clientelistic pact, the teachers' union (SNTE) local section maintained strong ties with the Oaxacan PRI and some of its leaders even occupied important positions within the party. Nevertheless, a serious dissident movement emerged in the late 1970s that called for improved working conditions and for increased respect for the union's autonomy. It also challenged the neo-patrimonial political intermediation monopoly. As the dissident movement grew, in 1980, the leader of the Oaxacan section of SNTE was quickly ousted from the PRI's subnational executive committee. To avoid isolation, the dissident teachers sought (with partial success) to establish links with COCEO and COCEI, as well as other regional organizations. The teachers also took advantage of their union's national dimension to bring their claims to the federal level.

Weakened by turmoil, the subnational government failed to block this breach in its monopolist control over interactions with the federation. Eventually, the dissident movement succeeded in dominating the Oaxacan section of the SNTE and in having its internal autonomy recognized. Henceforward, the Oaxacan government would have to deal with an independent actor with direct access to the federal government (Yescas Martínez and Zafra 2006). The proliferation of semi-autonomous social organizations and the independence of the local section of the SNTE upset Oaxaca's political

intermediation monopoly and called the future of neo-patrimonial domination into question. Nevertheless, these new players' inability to form a common front fragmented Oaxaca's political arena by creating new opportunities for political intermediation and allowed for the hybridization of subnational neo-patrimonialism (Hernández Díaz 2004).

## Hybridization and Neo-patrimonial Recomposition

Hybridization – that is, the creation of formally democratic institutions that coexist and possibly legitimize authoritarian practices – began in earnest in Oaxaca with the appointment of Heladio Ramírez López as the PRI's gubernatorial candidate in 1986. Despite the commercial elite's explicit opposition, Governor Ramírez López (1986-1992) made his indigenous origins a central element of his political discourse. He also drew on his experience in the PRI's corporate networks to promote a project that would depolarize Oaxaca's political debate and rebuild the authority of the neo-patrimonial regime (Dalton 2004).

Taking advantage of federal neoliberal policies that privatized or closed many sectoral agencies, Ramírez López strengthened the subnational government's influence by creating local substitutes. Thus, a subnational coffee agency – Oaxaca's main export – replaced the federal one in 1989 and became the exclusive provider of credit, storage and marketing for Oaxacan growers. At the same time, the subnational government accepted to negotiate with and respect the independence of the coffee growers' organizations in exchange for their political neutrality (Snyder 2001).

Ramírez López and his successors also succeed in partially reintegrating the teachers into the clientelistic pact. With resources from the federal education decentralization program, the Oaxacan government granted teachers considerable salary increases and gave their union a significant say in subnational education policy design and administration. In exchange, the teachers agreed to mediate between the government and the semi-autonomous subnational social organizations, thus contributing to the reconstruction of an exclusive political intermediation network (Martínez Vásquez 2004c; Cortés 2006). The Oaxacan government also sought to strengthen its influence among urban social organizations and trade unions through the clientelistic distribution of material resources and operating permits. Taxi drivers and street vendors' organizations in Oaxaca City were particularly targeted (Martínez Vásquez 2004b).

This model of political mediation is called neo-corporatism, because the subnational state continued to structure its relations with social groups on the basis of their economic role (Oxhorn 1998). This time, however, the subnational government eschewed the PRI and relied on its own bureaucratic apparatus. The new fiscal federalism – which imposed many new

obligations, but also granted substantial new resources to subnational states – aided this process by financing the creation of new subnational administrative structures (such as the state coffee council) (Sobarzo 2005).

Also important were the indigenist legislation reforms. One of Ramírez Ruiz's first acts as Governor was to appoint a public attorney for indigenous peoples, whose role was to facilitate their access to formal justice. In 1990, a subnational constitutional reform formally recognized Oaxaca's multicultural character. On this basis, Governor Ramírez López officially recognized the role of traditional authorities in agrarian conflict resolution and the importance of communal forms of ownership and work in indigenous municipalities.

The neo-Zapatista revolt in neighboring Chiapas in 1994 reinforced the Oaxacan government's sense of urgency. In order to meet new demands for indigenous autonomy, Governor Diódoro Carrasco Altamirano (1992-1998) decided to end the legal fiction surrounding the selection of rural and indigenous municipal authorities and formally recognized the customs and traditions surrounding these practices in a 1994 constitutional reform (Cruz Martínez 2001). This involved transferring yet another political mediation channel from the PRI to the subnational government, which created several regional bureaus to supervise the direct distribution of paternalistic and clientelistic resources in rural and indigenous communities. As a result, Oaxaca's growing bureaucratic structure enhanced neo-corporatism at the expense of the PRI, now relatively constrained to electoral endeavors (Recondo 2007c).

After 1988, the PRI found itself engaged in a prolonged decline, both at the federal and the subnational level. However, its decay in Oaxaca was much less pronounced, given the opposition's fragmentation and its concentration in the larger cities. Consequently, the PRI held on to electoral hegemony in the region. Despite numerous electoral reforms – which in Oaxaca consistently lagged behind federal standards – the PRI continued to dominate not only the Oaxacan government but also the subnational Congress, thereby frustrating any opposition attempt at legislative control. Despite its inability to effectively curb the subnational government, the opposition parties' breakthrough in Oaxaca during the 1990s must not be neglected, as they went from less than 25 percent to almost 50 percent of the votes between 1992 and 2004 (Alonso Criollo 2004; Recondo 2007c).

Nonetheless, this moderate success conceals two fundamental weaknesses: one is the opposition parties' fragmentation and their concentration in the larger cities, thus limiting their penetration potential and leaving the neo-patrimonial regime's political monopoly largely unchallenged in the rural and indigenous areas. Moreover, isolation in rural areas facilitated governmental repression. This weakness cost the Oaxacan Partido de la Revo-

lución Democrática (PRD)<sup>3</sup> numerous sympathizers, many of whom were assassinated in unclarified circumstances (Santibáñez Orozco 2004). The second weakness of the opposition political parties was their organizational fragility and their deep-seated fractiousness, which undermined their ability to compete with the state's more established social organizations. Even the opposition parties' major electoral successes – Juchitán in 1989 and Oaxaca City in 1998 – stemmed in fact from alliances with local organizations, such as the COCEI (Díaz Montes 1997, 2004; Juan Martínez 2004).

Furthermore, Oaxaca's economic policies continued to demonstrate the strength of the link between the state's political and commercial elites. While the state's agricultural and industrial policies were erratic and production stagnated, commercial initiatives flourished during the 1990s in the name of modernization with the arrival in preferential terms of major international concerns (i.e., Walmart and Costco) in partnership with the local merchant class. In return, Oaxaca's commercial elite financed the PRI's subnational election campaigns and actively participated in the government (Sorroza Polo 2006; López 2007).

Consequently, by 2000, Oaxaca was still ruled by a form of neo-patrimonialism. Despite moderate urbanization and social integration, Oaxaca was still a predominantly rural state with a large indigenous presence, in which many communities remained geographically isolated. Economically, the state remained poorly integrated and dependent on central Mexico.

From the 1970s onward, the emergence of numerous semi-autonomous social organizations challenged the subnational government's political intermediation monopoly. However, their fragmentation and their exclusively local focus, together with the government's neo-corporatist project and the recognition of rural and indigenous traditional authorities, helped renovate the old clientelistic pact. Handicapped by their organizational weaknesses and their permanent competition with social organizations, political parties could not offer an effective alternative for political intermediation, but rather contributed to the state's political fragmentation (this is what Oxhorn [1998] calls neo-pluralism).

Oaxaca's neo-patrimonial regime was thus able to adapt to its new circumstances through hybridization. On the one hand, electoral reforms gave opposition parties visible political space and the political opening allowed the subnational government to negotiate with and, in many cases, to depoliticize the semi-autonomous social organizations. On the other, indigenist

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3 The left-of-center PRD emerged in 1989 from the merger of a splinter faction of the PRI with several small leftist parties, including the successor of the old Mexican Communist Party. Since its inception, the PRD has been Mexico's third largest party (after the PRI and the PAN).



and electoral reforms reduced the scope of the PRI by recentering it on its partisan dimension. Moreover, the subnational government succeeded in recreating the clientelistic pact by concentrating the distribution of patrimonial resources in its own bureaucracy. Its continuous hold on rural and indigenous areas assured it an electoral majority and severely limited the opposition's ability to check the subnational government.

Although the neo-patrimonial intermediation monopoly was seriously contested and eroded, the subnational government remained the richest and most effective political mediator. Neo-corporatism and the renovation of the clientelistic pact in a profoundly and structurally fragmented political arena enabled the neo-patrimonial regime to continue to proclaim its irreplaceability in Oaxacan governance.

## The Storm

The 2000 presidential election, in which Vicente Fox – the PAN candidate – ended the PRI's 71-year reign at the federal level, also transformed Oaxaca's political landscape. On the one hand, federal alternation severed the organic link between the President and the state Governor without weaning the Oaxacan PRI from the subnational government (Gibson 2005). On the other, the PRI's relatively good results in Oaxaca and some other states turned them into bastions of the former hegemonic party and gave their political elites significant weight within the party, both in terms of policy and leadership (see O'Neill 2003). The PRI thus became an advocate of subnational political interests and, to a lesser extent, their agent before federal institutions – reversing its former role as a federal instrument in subnational politics (*La Jornada* 2007).

In Oaxaca, the neo-patrimonial elite continued to dominate both the regional PRI and the subnational government. In so doing, it reinforced its autonomy vis-à-vis the federation and – given the weakness of the new federal PAN government, which lacked sufficient political support in the state to put pressure on its government – renewed its role as the dominant political intermediary between the federal and subnational levels (Gibson 2005). Governor José Murat (1998-2004) took full advantage of the circumstances. Upon his arrival to power, he purged the subnational PRI of former Governor Carrasco Altamirano's supporters in order to establish complete control over both the party's mobilization process and its candidatures (most notably, that of his successor). Through the clientelistic use of federal fiscal transfers as well as of subnational government prerogatives, Murat also managed to integrate – or reintegrate – many organizations, urban as much as rural and indigenous, to the Oaxacan PRI (Santibáñez Orozco 2004). While the maneuver highlighted

important divisions within the Oaxacan PRI, neo-corporatism minimized political fallout to a large extent (at least in the short term).

With regard to the subnational section of the SNTE, Murat sought to restore the traditional clientelistic pact by ritualizing the union's annual demonstration around Teacher's Day on May 15. The event, ever more symbolic, became the time to renegotiate the teachers' wage rates as well as their role in the administration of the subnational public education system (López 2007). In contrast, when certain organizations or political parties – most notably the PRD and some of the more independent social organizations – proved recalcitrant in their opposition, Murat did not hesitate to resort to violent repression, either directly or through the PRI's shock groups. In this way, the subnational government contributed to Oaxaca's ongoing opposition fragmentation and isolation (Yescas Martínez 2007).

Nevertheless, Murat did not achieve complete control over Oaxaca's political system, since partisan opposition continued to grow, especially in the cities (Oaxaca and Juchitán, the state two largest cities, remained under opposition control throughout Murat's term). The Governor's confrontational style and the unavoidable comparison between subnational and federal political developments also fuelled substantial opposition.

The opposition's major challenge to Murat came during the 2004 gubernatorial election, when a coalition comprising the PAN, the PRD, *Convergencia Democrática*, and many social organizations and headed by the mayor of Oaxaca City waged a combative campaign. However, Oaxaca's political fragmentation frustrated these efforts, as the *Partido Unidad Popular*, a local party supported, among others, by a faction of COCEI, divided the opposition vote and guaranteed a thin and very controversial victory to the PRI (Yescas Martínez 2007).

Given the contested nature of his election, the new Governor, Ulises Ruiz Ortiz, immediately sought to reinforce his legitimacy. In consonance with Oaxaca's social heterogeneity, Ruiz Ortiz's efforts involved as much traditional as legal forms of legitimacy. On the one hand, his government used its infrastructure investments to maximize its visibility. Ruiz Ortiz is also suspected of having siphoned resources from certain investments and directed them towards discretionary expenditures in rural areas, thereby strengthening the clientelistic pact (Martínez Vásquez 2007; Recondo 2007c). On the other hand, Ulises Ruiz responded to the middle classes' and intellectuals' rule of law demands by pursuing his predecessors' hybrid democratic reforms. Oaxaca's freedom of information law is representative of this process: At first, Ruiz Ortiz blocked a PRD bill on this issue, but adopted the project as his own as the pressure increased, albeit limiting its scope and increasing the number of permissible exceptions. Thus, the law

was finally adopted in September 2006 – in the midst of the crisis – although its contents only marginally restricted the subnational government’s clientelistic activities (Johnson 2006).

Ruiz Ortiz also hardened his stance vis-à-vis the semi-autonomous social organizations that refused to support his government openly and explicitly. Numerous acts of repression – from the takeover of an opposition newspaper to several assassinations – were reported from the beginning of his government (Martínez Vásquez 2007). In so doing, Ruiz Ortiz seemed to seek to reimpose the neo-patrimonial political intermediation monopoly by force. The government’s rigid position also affected the SNTE. After negotiating with them in 2005 following the established ritual, Ruiz Ortiz chose to reject their demands in 2006 and violently dispersed their demonstration in downtown Oaxaca City in June 2006. Given the existing tensions and the teachers’ broad social networks, repression unleashed a violent political crisis (Recondo 2007a). In the following days, a broad coalition formed around the demand for Ruiz Ortiz’s immediate resignation. In addition to the SNTE’s subnational section, the newly formed Asociación Popular de los Pueblos de Oaxaca (APPO) included other well-established social organizations, student associations, university unions, and even radical groups linked to the guerrilla. Between June and November 2006, the APPO’s massive demonstrations paralyzed Oaxaca City on several occasions (Osorno 2007).

In an attempt to coordinate these disparate groups and their demands, the APPO adopted a large collective leadership, explicitly drawing on indigenous practices, most notably on its open deliberation procedures and its consensus decision-making rules. On this basis, some observers evoked visions of a Oaxacan *commune* (Gogol 2007). Despite these outreach efforts, the APPO did not enjoy a significant presence in many regions of the state and remained bound to Oaxaca City, the Mixteca, and the Sierra Sur, just north and south of the capital. Moreover, only a few PRD factions – and no other political party – joined the APPO. Most notably, COCEI stayed aloof during the conflict (Martínez Vásquez 2007).

The tensions between the proponents of a radical, revolutionary line and those of a peaceful and moderate approach eventually fragmented the APPO. The teachers, themselves affected by significant internal divisions, decided to withdraw from the APPO in October 2006, after obtaining separate satisfaction to their particular demands from the subnational government. The APPO’s subsequent radicalization led to violent confrontation with both sub-national and federal police and served to justify the government’s resort to violent repression (Yescas Martínez 2007).

Throughout the conflict, the commercial elite and many business organizations publicly supported Governor Ruiz Ortiz and repeatedly demanded the

resort to force to restore subnational law and order. As the situation deteriorated, these groups financed Radio Ciudadana, an illegal radio station whose mandate was to harass and intimidate the APPO and its members. Although the Catholic Church attempted to mediate in the conflict, its efforts were largely ignored (Sorroza Polo 2006; Martínez Vásquez 2007).

The 2006 federal elections complicated the situation in Oaxaca. Initially, the PRD and its presidential candidate, Andrés Manuel López Obrador, showed little interest in the conflict, as the close relationship between the PRI and the SNTE was well known. However, after the violent repression of their demonstration, the teachers called to vote for the PRD, which won a landslide victory in Oaxaca, both in the presidential and legislative contests, dealing a severe blow to the PRI's hegemonic claims.

Nationally, the election results were much less clear and the PRD strongly contested the PAN's narrow victory. Given the climate of uncertainty, the PAN negotiated an agreement with the PRI to ensure its candidate's – Felipe Calderón – accession to the presidency. As a result, the Senate fact finding mission's report on Oaxaca did not recommend federal intervention, despite recognizing the gravity of the situation. In exchange, the PRI formally recognized the presidential election's legitimacy (Martínez Vásquez 2007). The 2006 federal election confirmed both the PAN's weakness in Oaxaca and federal dependence on local political elites to guarantee subnational governance – even in the event of a major crisis. Consequently, just days before the transfer of power between Fox and Calderón, the federal police intervened in support of the subnational governor and crushed the APPO.

The federal PRD, occupied with its denunciation of electoral fraud, did not further intervene in the Oaxacan conflict. Meanwhile, the Oaxacan PRD, weak and divided, did not manage to adopt a unified position vis-à-vis the conflict. Therefore, only some of its factions participated in the APPO's moderate current and became a prime target for repression. With many of its leaders in prison, the APPO demobilized rapidly. Its member organizations recovered their independence and sought to rebuild a working relationship with the subnational government, which found in the federal fiscal transfers the means to reopen its dialogue with them and attempt to revive the old clientelistic pact. Oaxaca's traditional political fragmentation thus resurfaced quickly (Yescas Martínez 2007).

Once the revolt was crushed, and in keeping with the regime's hybrid nature, the July 2007 midterm legislative elections took place as planned. These elections demonstrated once again the absence of effective opposition parties in Oaxaca and their dependence on local organizations. Despite an expected opposition breakthrough, the PRI won all majority districts at stake with 49.6 percent of the vote (and a participation rate of 36.5 percent),

confining the opposition, as divided and poorly organized as always, to the minority proportional representation positions. The PRI also recovered Oaxaca City (Hernández Navarro 2007). The 2009 federal midterm election confirmed the trend, as the PRI won 43.7 percent, the PAN 16.3 percent and the PRD a mere 15.9 percent of the vote (IFE 2009).

Consequently, all attempts at legislative oversight are doomed to failure at least until the 2010 subnational elections. Since open opposition has been stifled – at least for the time being –, it is likely that Ruiz Ortiz will finish his term, despite some renewed, but largely symbolic guerrilla activity in some regions of the state.

## The Hybrid Nature of Subnational Neo-patrimonialism

What remains of Oaxaca's neo-patrimonial domination system? The subnational elite has certainly much less control over subnational politics today than it did in the 1970s. Numerous institutional and structural changes have taken place since, from electoral reform to the recognition of traditional municipal practices to the surge of at least semi-independent political organizations. Moreover, neo-patrimonialism appears battered by the recent political crisis and – from a broader perspective – by the erosion of the clientelistic pact, itself undermined by the PRI's gradual decline and the rise of open dissent.

Nonetheless, certain important elements of the neo-patrimonial system remain firmly in place. Oaxaca is still an extremely heterogeneous society and the state's political fragmentation and isolation is perhaps now even greater as a result of the APPO's failure in 2006 and the partisan opposition's electoral defeats in 2007 and 2009. The state's two distinct legitimacy logics thus remain operational and the need for a political intermediary to guarantee subnational governance has not disappeared, even if the dominant political mediator is no longer the PRI, but rather the subnational bureaucracy. After 2007, however, Ruiz Ortiz and the Oaxacan political elite do not seem to have competitors capable of challenging them in the short run. The creation of a common opposition front also appears more remote than ever. Moreover, during the crisis, the state's commercial business elite ratified its neo-patrimonial alliance with the Oaxacan political elite.

As a result, despite its weaknesses, Oaxaca's authoritarian elite remained the state's dominant political mediator. Faced with a weak and fragmented opposition, unable to construct a durable common front, the Oaxacan neo-patrimonial regime resorted to its aura of irreplaceability (*vis-à-vis* the federation and the majority of the state's political actors) in order to withstand strong, albeit localized popular mobilization (in what Gibson [2005] calls

boundary control). The role of regional governance guarantor, which Mexican federalism assigns to subnational governments (Medina 1997) and the Oaxacan Governor's capacity to force the PRI to represent its interests at the federal level also helped Ruiz Ortiz survive the 2006 political crisis.

In giving the incumbent regime a wide range of maneuver, neo-pluralism (Oxhorn 1998) also contributed to hybridization in Oaxaca, which proved to be an important factor in its survival. Initiated in the late 1970s, with the granting of formal political recognition to the semi-autonomous social organizations, the process has continued since, marked by the formal recognition of indigenous political identities that began in the 1980s, the electoral reforms of the 1990s and the freedom of information law of 2006.

In particular, neo-corporatism appears to have borne some results. On the one hand, it appears to be an important instrument in securing the political allegiance of the semi-autonomous organizations that emerged in the 1970s and 1980s. On the other, it allowed the teachers to consolidate their intermediary position between rural communities – whose traditional authorities are now formally recognized – and the subnational government. However, in the aftermath of the 2006 crisis, the SNTE's local section found itself formally split in two in face of the subnational government's tough negotiating tactics, thus limiting its mobilizing potential.

The political adaptation process where formally democratic political institutions coexist with authoritarian practices allowed the Oaxacan regime to gradually open the political system without calling either the domination system or its authoritarian character into question. Moreover, the crisis did not stop hybridization, as the adoption of the Oaxacan freedom of information law and the unwavering respect of the electoral calendar show. These two examples highlight as well the changes as the continuity in Oaxacan neo-patrimonial governance. The emergence of the authoritarian enclave is therefore as much a matter of political survival as it is of political innovation.

Since its inception, neo-patrimonialism in Oaxaca has proved unstable. Several contestation cycles can be identified since 1946 – the APPO representing only the most recent one. History shows that only when the commercial elite (the only actor with an effective state-wide network) participates – or at least refrains from supporting the government – have these movements obtained the governor's resignation. This was clearly not the case in 2006. Furthermore, only the contingent political intermediary has been called into question – never the domination system itself.

Yet, two significant doubts remain about the future of neo-patrimonialism in Oaxaca. The first is its increasing resort to violence, an indication that the regime's sources of legitimacy are fragile. Political violence, a permanent presence since the 1970s, accelerated with Ruiz Ortiz's closure to

dialogue and climaxed during the 2006 crisis. It seems that the Governor has since reconsidered and now attempts to revive the old clientelistic pact. It is too early to judge his success, but if the subnational political system runs out of control, the federation may be forced to intervene and impose much deeper reforms than simple hybridization.

The second threat to neo-patrimonialism in Oaxaca is the future of fiscal federalism in Mexico. These resources have allowed the government to renew the subnational clientelistic pact through neo-corporatism. However, this flow is not permanently guaranteed because it depends both on the country's economic conditions and federal political goodwill (Sobarzo 2005). Without these resources, the Oaxacan elite cannot hope to preserve what remains of the neo-patrimonial intermediation monopoly – even though there is evidence that partial changes to fiscal federalism may not have too significant effects on subnational political systems (Montero 2009).

In the end, heterogeneity is still Oaxaca's basic social fact. Despite some changes, Oaxaca remains predominantly rural and has Mexico's highest proportion of indigenous population. Without neo-patrimonialism, how can Oaxaca be governed? The future evolution of the Oaxacan political system is an open question, but the state's social structures are resilient and will surely continue to influence political developments, regardless of their content and direction.

## An Analytic Coda

In studying Oaxaca, the resort to the neo-patrimonial hypothesis is almost self-evident. The social make-up of the state and especially the presence of a large indigenous population that has preserved its own systems of authority make it easy to identify both the traditional and the modern sectors of Oaxacan society. Moreover, the profound dual heritage of the Mexican Revolution – simultaneously legal and traditional – has given rise to the multiple sources of legitimacy that are at the root of neo-patrimonialism. Furthermore, as this article shows, the presence of multiple forms of political legitimacy allows for the emergence and hybridization of the Oaxacan authoritarian enclave.

Other authoritarian enclaves, however, are less clearly neo-patrimonial, both in Mexico and elsewhere. At the very minimum, the absence of a strong indigenous component makes the identification of diverging conceptions of legitimacy much more difficult (although some authors point out that their strong reliance on family and other symbolic ties does suggest reliance on at least a limited form of patrimonialism [Rêgo 2008]). Hybridization, working at the interface between legal and traditional forms of le-

gitimacy in Oaxaca may travel elsewhere through the grey areas between formal and informal politics (Helmke and Levitsky 2006). Whatever the case might be, the existence of these subnational authoritarian enclaves is not in question (Gervasoni 2010 in this issue; Giraudi 2010 in this issue; Montero 2010 in this issue).

Of what use is the neo-patrimonial hypothesis in these cases? While I am unable to offer a definitive answer on the basis of this article, this question opens the way for further theoretical reflection. While further consideration and empirical reference are clearly necessary, I suggest some preliminary thoughts.

With regard to the emergence and hybridization of subnational authoritarian enclaves, the Oaxacan case suggests that the need for political intermediation is at least as important as the tradition/modernity (or formal/informal) cleavage. It can thus be presumed that other forms of social heterogeneity, where the issue of diverging perceptions of legitimacy is absent, may also give rise to a need for political intermediation and, on this basis and through boundary control at the subnational and federal levels, to the development of subnational authoritarian enclaves.

If this is the case, Latin America's profound structural-historical heterogeneity (Quijano 2000) suggests that the need for political intermediation – rather than the more limited cases of neo-patrimonialism – may be the key explanatory variable behind subnational authoritarianism. This insight, however, can only be confirmed through further research, both in Mexico and elsewhere.

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### **Neopatrimonialismo y autoritarismo subnacional en México. El caso de Oaxaca**

**Resumen:** ¿Cómo es que algunos enclaves autoritarios subnacionales emergen (o subsisten) tras las transiciones a la democracia de sus federaciones? ¿Cómo sobreviven a movilizaciones masivas como las que conoció Oaxaca en 2006? La tolerancia federal es una condición necesaria para el desarrollo de las prácticas autoritarias subnacionales, pero es insuficiente para explicar cómo dichas prácticas aparecen y se reproducen en algunos sistemas políticos subnacionales. Por ello, en este artículo estudio la dimensión interna del autoritarismo subnacional. Arguyo que, al basarse en dos fuentes distintas de legitimidad, el sistema oaxaqueño de dominación neopatrimonial fue capaz de responder a las presiones democráticas provenientes de la federación sin perder su carácter autoritario. Este proceso de hibridación transformó las instituciones oaxaqueñas, pero dejó intactas las estructuras sociales y las dinámicas políticas que derivan de ellas – en otras palabras, las fuentes del autoritarismo subnacional subsisten indemnes. Al explorar la evolución del neopatrimonialismo y de la hibridación del régimen oaxaqueño desde una perspectiva teórica, busco analizar las condiciones de cambio y continuidad en la política subnacional – en México y en otros países.

**Palabras clave:** México, Oaxaca, Cambio de Régimen, Política Subnacional, Neopatrimonialismo, Hibridación.