

Houston's Baker consultancy reports on the vote for Claudia Sheinbaum in the Mexican presidential election

Claudia received the support of four categories of financially independent voters, but she needed AMLO-loyalist voters to win


HOUSTON, TX, UNITED STATES, June 7, 2024 /EINPresswire.com/ -- Two reports issued by Baker & Associates, an energy and policy consultancy that covers Mexico, examine the voter dynamics of the presidential elections held on Sunday, June 2. Claudia Sheinbaum, the candidate of the ruling MORENA party, received 33.3 million votes, over twice those of her nearest competitor, Xóchitl Gálvez, who represented a coalition of the legacy parties of the late 20th century.

In the first report ([Market Note 277](#)), the authors that 62% of the votes received by Sheinbaum were by financially motivated people. The largest category of such voters is composed of beneficiaries of the diverse social programs devised by the administration of President Andrés Manuel López Obrador (AMLO). The president is well known for his slogan, "Attend first to the poor," and for his lavish cash handouts to low-income populations, including seniors, young adults, and Indigenous communities, among others—and from whom political loyalty has been consistent.

A second category is the narco-intimidated vote. Cartels have benefitted from AMLO's lenient policy of "Hugs not bullets." The U.S. Government estimates that 30% of Mexican territory is effectively in the hands of drug cartels.

The report flags, as a third category, the military-contractor community: In an unprecedented pivot in official procurement policy, the army was given authority for the construction of major infrastructure projects, including an airport, a regional rail system, and a transisthmian corridor.

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Houston, June 6, 2024

How Claudia Won in 2024
Support by four categories of financially independent voters

IN THE ELECTIONS of June 2, 2024, the candidate of the ruling MORENA party, Claudia Sheinbaum, received 33.2 million votes, or 58.9% of the total vote. Her principal opponent, Xóchitl Gálvez, received 15.6 million votes, or 27.9% of the total vote of 56 million (with a 60% voter turnout).

In a previous report (Market Note 277), we imagined the distribution of voters who were financially motivated to support MORENA candidates. Our heuristic number is 62% (Table 1), or 20.6 million votes. If so, 12.6 million votes received by her are yet unaccounted for.

We imagine four categories of voters who were not financially motivated to vote for MORENA:

- Anti-Establishment voter** who cannot accept the authenticity of any candidate or proposal of any of the legacy parties (PRI, PAN PRD).
- Anti-Xóchitl voter** for whom her selection, life story, and political message did not ring true, and her language and deportment were off-putting.
- Pro-Claudia voter** feels a class connection with her on account of her upbringing (ballet classes, English), education (Ph.D.), elocution, and seriousness, winning 56.3% of the middle-class vote. While this voter acknowledges that her political career owed its start to AMLO, she is credited for not repeating the president's historical grievances and energy irredentism. She is the redeemable 4T candidate. Unlike Xóchitl, Claudia is "one of us."
- 4T Idealist voter** is not financially beholden to AMLO or MORENA but believes in the president's radical national narrative and dismisses risks to come from the downgrading of public guardrails.

We assign percentages to each of these categories (Table 2). By this accounting, Claudia needed only 3 million votes, or 9% of the hard, AMLO-loyalist vote to tie Xóchitl Gálvez.

Critics doubt that Claudia's grace notes will redeem the institutional destruction of the 4T agenda or reverse its course. See Comments (Annex A).

Social program beneficiaries	
Seniors	10
Young adults	5
Ethnic & social groups	10
Working classes	10
Sub-Total	35
Public sector unions/corporate	12
4T infrastructure contractors	5
Military	3
Narco-influenced	5
Morena-hired public employees	2
Total	62

Data: Heuristic / Rev. 3 (6/6/24)

	%	Votes (MM)
AMLO Client vote	62	20.6
Independent votes		
Anti-Establishment	10	3.3
Anti-Xóchitl	5	1.7
Pro-Claudia	15	5.0
4T Idealists	8	2.7
	38	12.6
Total	100	33.2

Data: Heuristic (6/6/24)

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In parallel, the energy ministry was given contractual authority for a new refinery. As many as US\$30 billion in contracts may have been issued by direct award or restricted tender—without an international public tender, as required for major items by the US-Mexico-Canada Agreement of 2020 (USMCA). As the army was involved, procurement records are deemed confidential as matters of national security.

“Established and overnight contractors to the army and energy ministry had a strong motivation to vote MORENA,” observes George Baker, the principal author of the report.

The report asserts that Dr. Sheinbaum, as the ruling-party candidate, also benefitted from a huge financial advantage, She received funds from the National Electoral Institute (INE), as required by law, with a cap on total campaign expenditures. The candidate of the ruling party benefits from government propaganda and

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George Baker

other means of electoral support. During the presidential campaign period of 2006, pro-government TV and radio spots were continual, as were others that were derogatory of Mr. López Obrador who was then a candidate. Additionally, by tradition, parties receive extra-legal funds from individuals, contractor rebates, interest groups, and industrial and financial elites.

These funds allowed the Sheinbaum campaign to hire armies of field workers, pay for months of media

advertising, plaster wall-miles of publicity, and contract fleets of buses to transport voters to polling stations.

In the second report ([Market Note 278](#)), the authors identify four categories of voter who are not financially dependent on the social programs or procurement regimes of the AMLO administration. The report includes comments from observers who describe the outcome of the election in near-apocalyptic terms, citing the risk to the rule of law in a MORENA majority in congress from the removal of institutional guardrails against executive overreach. Others, in Mexico and abroad, congratulate the MORENA candidate and offer to collaborate with her in

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Data: Heuristic

Market Note 278 Table 2 Voter categories in the 2024 elections

confronting the challenges ahead. The trade association of oil companies in Mexico, (AMEXHI) by its acronym, has offered to work with the new administration in a yet-announced framework for private oil exploration.

Opposition parties, stung by the lopsided vote for MORENA and its presidential candidate, are asking for a full recount, just as AMLO had done in 2006 when he lost the presidency by 0.6%.

"This election is destined to be as controversial as those of 1988 and 2006," predicts George Baker, the principal author of the report, "but for different reasons. The earlier election controversies were about rigged vote counting. The controversies of the 2024 election will be about rigged vote buying, campaign finance violations, and the unprecedented support of ruling-party candidates by organized crime."

"One challenge for the Sheinbaum administration will be to sustain popular support for AMLO's legacy while disavowing his energy irredentism," predicts Mr. Baker.

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MEI 277 - Table 1 - MORENA votes (%) that were prepaid

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