



# MEXICO AND THE FOURTH TRANSFORMATION



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The artworks in this dossier are from the mural series *Los Nadies*, created by Colectivo Subterráneos in Oaxaca, Mexico. Founded in 2021 to democratise art as a tool for social transformation, the collective draws on Mexico's graphic tradition – from the Taller de Gráfica Popular (People's Graphic Workshop) to Mexican muralism – as well as the 2006 Popular Teachers' Movement of Oaxaca. Inspired by Eduardo Galeano's poem of the same name, the series includes prints and murals that highlight indigenous and mestizo peoples forgotten under colonial rule and modern capitalism, confronting the historical debt to the marginalised and amplifying voices that demand justice in a Mexico under transformation.

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# Introduction

It is 24 April 2005, and something both predictable and unprecedented is happening in the streets of Mexico City. The historic city centre and its iconic national square, the Zócalo, are no strangers to protests. This is where the Mexican masses have marched, occupied, stood their ground, and never remained silent. That day, a stew of outrage, exasperation, optimism, and stubbornness was brewing in the streets of the capital.

Thirteen years later, this mixture would lead to the Fourth Transformation (*la Cuarta Transformación*) – Mexico’s first left government in almost one hundred years. More than a million Mexicans took to the streets to resist President Vicente Fox’s attempt to use the *desafuero*\* to strip Andrés Manuel López Obrador (AMLO) of constitutional immunity in order to invalidate his presidential candidacy. The strategy smacked of a great fraud against AMLO, who was emerging as a real threat to the two-party hegemony of the Institutional Revolutionary Party (Partido Revolucionario Institucional, PRI) and the National Action Party (Partido Acción Nacional, PAN). Electoral fraud was nothing new. In 1988, for

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\* In Mexico, the *fuero constitucional* grants certain public officials immunity from prosecution for common crimes unless Congress first votes to remove this protection through a process known as *desafuero*. The Mexican Congress used the *desafuero* to strip López Obrador, then head of the Mexico City Government, of his constitutional immunity so that he would be compelled to defend himself against charges brought by the attorney general’s office for failing to comply with a court order to halt construction of a road on land that previous city administrations had expropriated. The Fox administration knew that, even if López Obrador were acquitted, he would be unable to run for the presidency in the 2006 elections while the legal proceedings were ongoing. As anticipated, the proceedings were protracted, and AMLO was not able to run.

instance, Cuauhtémoc Cárdenas Solórzano, then a fellow member of AMLO's party – the now-defunct Party of the Democratic Revolution (Partido de la Revolución Democrática, PRD) – lost the presidency despite having won at the polls.

Facing the possibility of their candidate being disqualified, AMLO's supporters decided that they would not let themselves be trampled. They occupied the city centre and showed that there was a social base willing to build an alternative to the regime that had begun to consolidate itself as the 'PRIAN'.\* Thus began a new chapter in Mexican history – a history of struggles and victories, repression and setbacks, rebellion and revolution, betrayal and defeat, and of undeniable transformations that, like all evolutions, are not linear but ebb and flow across time.

This dossier, *Mexico and the Fourth Transformation*, examines the changes that have taken place since the National Regeneration Movement (Movimiento de Regeneración Nacional, Morena) came to power. To better understand these changes, we situate them within Mexico's long processes of democratisation since its independence. The research was conducted by Stephanie Weatherbee of the International Peoples' Assembly and Alina Duarte, a journalist and International Political Education Coordinator for Morena's National Institute for Political Education (Instituto Nacional de Formación Política de Morena).

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\* López Obrador introduced the term 'PRIAN' into the country's political vernacular. A portmanteau of the PRI and PAN parties, the term condemns the collusion between the two parties and critiques the false democracy and alternation of power that emerged after Vicente Fox's 2000–2006 administration.



## The Three Transformations

A republic born out of violent Spanish colonisation, Mexico has traversed a long and turbulent path in search of sovereignty, social justice, and development over the last two centuries. Morena conceives of this history as one of successive transformations, namely the War of Independence (1810–1821), the War of Reform (1858–1861), and the Mexican Revolution (1910–1917). Its national project is therefore identified as a Fourth Transformation, or ‘4T’.

### The War of Independence (1810–1821)

The colonisation of the Mexican territory was a brutal process that devastated a multiethnic population whose history stretched back thousands of years. Across what is now Mexico lived Olmecs, Zapotecs, Mayas, Nahuas, and other peoples, many of whom survive to this day.<sup>1</sup>

During the independence era, Spanish-descended criollos\* invoked the grandeur of pre-Hispanic civilisation in response to domination by peninsular Spaniards. This shared mythology of ‘Mexican greatness’ played an important role in the War of Independence and, in some ways, continues to resonate today.<sup>2</sup>

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\* In colonial Latin America, criollo (or criolla when referring to women) most commonly refers to people of full Spanish descent who were born in the Americas, distinct from *peninsulares* (Spaniards born in Spain). Though they shared ancestry, criollos were socially and politically disadvantaged compared to peninsulares and played a central role in many independence movements.

The struggle for independence was a war of the masses, waged by hundreds of thousands of soldiers – mainly peasants and indigenous people – initially led by Father Miguel Hidalgo. Brandishing the image of the Virgin of Guadalupe, Hidalgo rallied the people to insurrection, calling for a struggle that went beyond material demands to bring about a social and political reorganisation of a population he believed was destined to live in freedom. In Mexico’s political imaginary, Hidalgo has been canonised as a heroic figure who took the first steps towards the formation of the motherland, a kind of political ‘father’ of a rebellious people thirsting for liberty. This mythology – and the idea of Mexico as a tireless people with a proud ancestry – continues to shape the country’s political culture and each subsequent process of transformation.

### **The War of Reform (1858–1861)**

The prolonged conflict between liberal and conservative forces – with opposing national projects – culminated in the War of Reform. This confrontation represented the struggle between a centralist, monarchical model supported by the conservatives and a liberal, federalist state advanced by the liberals. In this context, the liberals sought to weaken the political and economic power of the clergy, whose privileges were also coveted by the nascent bourgeoisie.

Before and during this period, Mexico was the site of several invasions that threatened its sovereignty: the United States in 1846, which led to the loss of more than half of the national territory, and France, first from 1838 to 1839 and again from 1861 to 1867. These

threats forged a nationalist resistance in which the people fought fervently to defend their sovereignty and motherland.

Undoubtedly, the War of Reform was one of the pivotal historical processes that most contributed to the development of Mexico's national consciousness. The victory of the republican forces, led by Benito Juárez and Sebastián Lerdo de Tejada, over French intervention marked a milestone in the country's history. The execution of Emperor Maximilian I at Cerro de las Campanas became an unequivocal symbol of Mexico's resolve to remain a sovereign and anti-monarchical nation.

The liberal victory not only consolidated independence from foreign powers but also enabled a series of reforms that wrested power away from the Church. These transformations paved the way for the rise of a bourgeois oligarchy capable of advancing the country's modernisation and industrialisation.

## **The Mexican Revolution (1910–1917)**

The Mexican Revolution was the process of social transformation with the greatest popular participation in the country's history, marked by the leadership of the peasant and indigenous population. The Liberation Army of the South (Ejército Libertador del Sur), led by Emiliano Zapata, and the Division of the North (División del Norte), commanded by Pancho Villa, made up the revolution's principal popular forces. Their unity was symbolised by their triumphant entry into Mexico City in 1914.

Inspired by the Plan of Ayala,\* these revolutionary caudillos\*\* advanced an alternative national project that was profoundly popular and transformative. The indigenous peasantry of the southeast and the ranchers of the north embodied this vision, which continues to serve as a model and inspiration for many social movements in Mexico today.

The United States played a decisive role in shaping the course of the revolution. US intervention – including the occupation of the port of Veracruz in April 1914 and the supply of weapons and ammunition to supporters of Venustiano Carranza, a less radical leader – was key to stopping and eventually defeating the popular project led by Zapata and Villa. US President Woodrow Wilson’s support for Venustiano Carranza was cemented by Wilson officially recognising Carranza, which contributed to the decisive defeat of the popular revolutionary forces.<sup>3</sup>

The political order that emerged from the revolution would be the most complex and influential in modern Mexico – and it is precisely this legacy that Morena’s contemporary political project would confront. Despite the defeat of the popular revolutionary project, the revolution left a profound mark: it fostered social consciousness,

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\* The plan of Ayala, set out by Emiliano Zapata in 1911, established the distribution of land to the people and the expropriation of large, landed estates known as *latifundios* as fundamental demands of the revolution. Absent these commitments, reconciliation with the people in revolt would have been impossible. The Plan of Ayala transformed a political revolution proposed by Francisco I. Madero into a social revolution. See Salmerón, *Cien preguntas sobre la Revolución Mexicana* and Pineda Gómez, *Ejército libertador 1915*.

\*\* A caudillo is a political-military leader who commands personal loyalty and authority, often emerging in revolutionary or populist movements in Latin America.

national self-esteem, and popular confidence that could no longer be ignored. Conservative forces were compelled to come to terms with these new realities.

As a result, the 1917 Constitution enshrined many of the demands of peasants and workers, though compliance by the ruling elites has historically been limited. To maintain power in a radicalised and still armed country, presidents such as Venustiano Carranza (1917–1920) and Álvaro Obregón (1920–1924) relied on a system of revolutionary caudillos: military leaders who inherited political positions in exchange for loyalty to the *jefe máximo* ('maximum leader') of the day. This system, which served the interests of the bourgeoisie that survived the revolution and the former large land-owners, has endured in various forms until today.

Morena's 4T is conceived as a continuation of these three processes that laid the foundation of contemporary Mexico. The legacy of each is embedded in what is known as 'Mexican humanism', which weaves together millennia-old indigenous culture and the country's historic struggles. On the one hand, it upholds the values of indigenous peoples, embodying a spirit of freedom and communalism opposed to colonial private property. Beyond recognising the importance of indigenous cultures and respecting their customs, Mexican humanism affirms the rights of these communities as political subjects. On the other hand, it draws inspiration from key figures such as Father Hidalgo, José María Morelos, Benito Juárez, Emiliano Zapata, Pancho Villa, Francisco I. Madero, and Lázaro Cárdenas, who personify values such as social justice, democracy, and sovereignty.<sup>4</sup>

The 4T has sought to root these principles in a transformative project that revitalises national identity and builds a new, inclusive power bloc deeply bound to the Mexican people and their history. The conception of the 4T is intended not only to legitimise Morena's political project, but also to distinguish it from the *priismo*\* of the Institutional Revolutionary Party and other currents of the country's ideological left.

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\* *Priismo* refers to the political culture and practices associated with the PRI's decades in power.



# The Revolution Betrayed

After the revolution ended in 1917, the ruling forces had to face – without rest or respite – a radicalised, organised, and in some cases armed people who had not forgotten what they dreamed of and built during the ten years of the revolution.

The struggles of workers, peasants, and tenants were part of a tireless effort to continue the fight against the betrayal of the revolution under the governments of Venustiano Carranza (1917–1920), Álvaro Obregón (1920–1924), Plutarco E. Calles (1924–1928), and the Maximato (1928–1934).<sup>\*</sup> Ultimately, the relentless peasant, worker, and urban movements saw the fruits of their persistence in the 1934 victory of their presidential candidate, Lázaro Cárdenas.

## Cardenismo

A revolutionary caudillo from the state of Michoacán, Lázaro Cárdenas built the first left government in Mexico's history. *Cardenismo* – anti-large landowner, anti-imperialist, and pro-worker – enacted the most far-reaching popular reforms the country had ever seen: agrarian reform, oil expropriation, the welfare state, and an education system oriented around a national project.<sup>5</sup>

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<sup>\*</sup> The period between 1928 and 1934 is known as the *Maximato*, taking its name from Plutarco E. Calles, known as the *Jefe Máximo de la Revolución* ('Maximum Leader of the Revolution'), the most influential politician and military leader of the time. During this period, Emilio Portes Gil, Pascual Ortiz Rubio, and Abelardo Rodríguez served as presidents.

Despite eliminating large, landed estates and introducing *ejidos*\* as collective units of family agricultural production, the agrarian reform carried out between 1935 and 1937 failed to dismantle the political power of the landed elite or create the economic structures needed to ensure the economic and productive survival of the ejido. Despite these limitations, Cárdenas's agrarian policy undeniably helped lift the countryside out of the backwardness and marginalisation imposed by colonialism and the latifundio system.<sup>6</sup> In addition to the redistribution of the country's most productive lands came expanded access to education, healthcare, and culture in rural areas.

A long and fierce struggle by the oil workers' unions against foreign capital created the conditions for oil expropriation. The 1935 strike and the 1937 general strike went to the Supreme Court, which ruled in favour of the workers' wage demands. Confronted with this challenge – posed not only by organised labour but also by a state committed to the people – foreign companies mounted a campaign to pressure and discredit the Cárdenas government. Convinced of the companies' bad faith, Cárdenas announced in 1938 that the state had no choice but to expropriate oil for the good of the country.<sup>7</sup>

Cardenismo was, therefore, a reaffirmation of the struggles and the national project that had seemed defeated after the revolution. It implemented a developmentalist, redistributive economic policy that promoted growth through the expansion of the domestic market – a model upheld by subsequent governments until the rise of

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\* The ejido is a form of communal property established after the Mexican Revolution through which members of the ejido have the right to use and benefit from the land.

neoliberalism. Politically, however, Cárdenas introduced new ways of organising the state, exercising power, and integrating popular organisations into state institutions, paving the way for the creation of the PRI. In the countryside, agrarian reform was institutionalised, and the drive to politically strengthen the ejido gave rise to organisations such as the National Peasant Confederation, whose dependence on the state undermined the independent political action of the peasantry.<sup>8</sup>

After Cárdenas's presidency, both the commitments forged in the revolution and the advances of cardenismo were betrayed. The right's rejection of cardenismo was consolidated under presidents Manuel Ávila Camacho (1940–1946) and Miguel Alemán (1946–1952), who, in alliance with the PRI, built an authoritarian project that buried cardenismo's socialist horizon and repressed social movements. Violence against trade unionists and peasants – such as the 1962 assassination of Rubén Jaramillo and the 1968 Tlatelolco Massacre – revealed the PRI regime's repressive character. Meanwhile, left parties failed to build a viable alternative to the PRI: the Popular Socialist Party (Partido Popular Socialista, PPS) was coopted, and the Mexican Communist Party (Partido Comunista Mexicano, PCM) remained marginal.<sup>9</sup> The absence of an effective left alternative contributed to the curtailment of democracy while the PAN established itself as a docile opposition.

Following the repression of the ‘Dirty War’,<sup>\*</sup> sectors of the left abandoned armed struggle in favour of the electoral path. In 1988, after the fraudulent election that installed Carlos Salinas as president, the National Democratic Front (Frente Democrático Nacional) was born under the leadership of Cuauhtémoc Cárdenas. The following year saw the creation of the PRD as a left alternative, with support from movements such as the University Student Committee (Comité Estudiantil Universitario, CEU) of the National Autonomous University of Mexico (Universidad Nacional Autónoma de México, UNAM).<sup>10</sup> However, the PRD – weakened by its many factions and patronage practices – failed to achieve internal unity, lost political direction, and became an electoral vehicle.<sup>11</sup> This replication of the PRI’s vices contributed to the PRD’s decline and the emergence of Morena.

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\* The ‘Dirty War’, here, refers to a set of military and political repressive measures aimed at dissolving political opposition movements and guerrilla groups that acted against the Mexican state. See Mendoza, ‘La tortura en el marco de la guerra sucia en México’.

## Morena and the 4T

Between 1989 and 2018, struggles against neoliberalism and for democratisation abounded across the country. Among them were the Zapatista uprising (1994); the El Barzón movement against the plan to rescue twelve private banks that formed the Banking Fund for the Protection of Savings (Fondo Bancario de Protección al Ahorro); the fight against the neoliberal project for higher education that gave rise to the General Strike Council (Consejo General de Huelga) at the UNAM in 1999; the resistance to a new airport by the residents of Atenco (2001–2006); the defence of teachers' labour rights during the 2006 education reform waged by the Popular Association of the Peoples of Oaxaca (Asociación Popular de los Pueblos de Oaxaca, APPO); the #YoSoy132 (#IAm132) student movement (2012); and the mass movement against the disappearance of forty-three student teachers in Ayotzinapa (2014). Of all the resistance movements that emerged in this period, Zapatismo was undoubtedly the one that became a national point of reference for the social left, representing an anti-systemic and anti-capitalist struggle that rejected the electoral path as a strategy for change.

During this same period, López Obrador established himself as an alternative political figure. His political education began in his home state of Tabasco, where he worked with indigenous communities to fight against social exclusion. His time in the PRI and the PRD led to his election as the head of the Mexico City Government, consolidating his political profile as an opponent of the system. The removal of his constitutional immunity – orchestrated by the PRI and the PAN – transformed him into a symbol of resistance. Following the

2006 electoral fraud, Morena began to be built from the ground up, starting with the National Democratic Convention.<sup>12</sup> Despite not having initiated or led the major social struggles that defined the resistance to neoliberalism, López Obrador succeeded in channeling the people's discontent and indignation into the creation of a new electoral vehicle: Morena, which in 2018 won the presidency with a popular, grassroots, and nationalist project.

The 4T, in the words of current Secretary for Women's Affairs and former General Secretary of Morena Citlalli Hernández, is a project that seeks to forge a new nation by transforming its political and economic structures. Six and a half years into the process, we can identify the core aims of Morena's transformative proposal: the deconstruction of neoliberalism and the redemocratisation of the country. Both dimensions of this transformative project face contradictions, some stemming from Morena's heterogeneous composition, others from the inherent difficulty of reversing, in a short period of time, an economic and state structure that was consolidated over the course of decades.



## Reversing, Reforming, or Burying Neoliberalism

When presenting the 2019–2024 National Development Plan (Plan Nacional de Desarrollo, PND), López Obrador – whose 2018–2024 presidential term inaugurated the 4T – declared that neoliberalism in Mexico had been definitively overcome and would no longer guide the country’s economic policy. The statement was undoubtedly aspirational, as six years later the country remains bound to economic conditions that reproduce neoliberalism.

Before Miguel de la Madrid’s presidency (1982–1988), Mexican economic policy was marked by deep and broad state involvement, an import substitution industrialisation (ISI) model, and a large portfolio of state-owned enterprises. The adoption of programmes recommended by the IMF, the World Bank, and the US Federal Reserve and Treasury Department drastically reshaped national economic policy. The financial system was almost entirely privatised and foreign trade liberalised, opening the door to foreign investment in ways that shifted the economy almost exclusively toward external markets – notably that of the US.<sup>13</sup>

Trade liberalisation, which began in 1983 with tariff reductions, was followed by Mexico’s entry into the General Agreement on Tariffs and Trade (GATT) in 1986 and culminated in the 1993 approval of the North American Free Trade Agreement (NAFTA). The aggressive privatisation of public enterprises, a regressive tax reform, and fiscal discipline through public spending cuts destroyed the

already weakened pact between the working class and capital built by post-revolutionary governments. During Ernesto Zedillo's presidency (1994–2000), the dismantling of the Supreme Court allowed unconstitutional reforms to advance without due process.

The Pact for Mexico (Pacto por México), signed in 2012 under Enrique Peña Nieto as an agreement uniting the PRI, PAN, and PRD parties, represented the culmination of more than three decades of neoliberalism. The pact promoted an energy reform that in 2013 opened the hydrocarbons market to greater private participation and a telecommunications reform that same year which established autonomous state regulatory bodies that favoured private initiative over the public interest.

In López Obrador's discourse, neoliberalism is framed as a grand scheme of corruption and systematic impoverishment that benefited only a small portion of the population. While this view may oversimplify a more complex reality, it aligns with the widely held perception that the reforms of the neoliberal period were an abuse of power by the ruling classes and that they unfairly and disproportionately benefitted those with access to power.\* Notable examples of these policies include the sale of state-owned companies at low prices, which facilitated the creation of monopolies; tax breaks that

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\* The sale of the state-owned telecommunications company Telmex is the most important example of this. After the company was privatised in 1990, a five-year regulated rate plan was approved, which increased the company's value. To date, telephone service prices in Mexico are considered high due to the monopoly that was created.

drained public coffers; and the expansion of maquiladoras,<sup>\*</sup> which gave rise to an impoverished industrial proletariat geared toward foreign markets.

The discourse on corruption has therefore resonated deeply with the majority of the population, who view the 4T as a bulwark against these abuses despite the absence of substantial changes to neoliberal economic policy. In this way, reversing neoliberalism has come to be understood as synonymous with fighting corruption. The 4T's main reforms have amounted to modifications – not transformations – of the state and how it mediates relations between capital and labour, between national and foreign business interests, and between the state and the Mexican people. Ending corporate debt forgiveness, collecting evaded taxes, nationalising lithium, substantially raising wages, and regulating subcontracting through the Federal Labour Law (*Ley Federal del Trabajo*) are examples of this modification of the state.

During the second 4T government, led by Claudia Sheinbaum (2024–2030), energy sovereignty has been strengthened through the recovery of state control over the country's strategic resources. After years of deliberate neglect that opened it to private interests, *Petróleos Mexicanos* (Pemex) was rebuilt with public investment. Hydrocarbon production and national reserves increased, while

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\* A maquiladora is a foreign-owned factory in Mexico that imports materials or components for assembly and then exports the finished products, typically to the United States. Maquiladoras rely on lower-paid labour, historically concentrated among women workers, and have been widely criticised for exploitative working conditions and environmental impacts.

crude oil exports and imports of gasoline, diesel, and natural gas from the US decreased. The 2022 purchase of the Deer Park refinery in Texas – the cost of which was recouped in just one year – and the construction of the Olmec refinery in Tabasco marked a shift toward fuel self-sufficiency. In addition, contracts were renegotiated to align extraction with national consumption, improving operational efficiency.

At the same time, the Federal Electricity Commission (Comisión Federal de Electricidad) was strengthened with state backing, consolidating its strategic role. The company increased revenue, regained value as a public asset, and positioned itself as a pillar of the national electricity grid.

Energy reform, presented in January 2025 as part of the 4T's second package of modifications, restores the state's role in planning the electricity sector, which is essential both for increasing the value of Mexican companies and ensuring inclusive economic development. The same reform also recognises electricity as a fundamental element of a dignified life rather than as a commodity, both in legal and discursive terms.<sup>14</sup> The reform further enshrines in the constitution that all activities of public enterprises must prioritise coverage and access over profit.

Such reforms required overcoming neoliberalism at the ideological level – a shift that should not be underestimated or minimised. An essential part of the struggle against neoliberalism involves dismantling a belief system that vilifies the state and the collective while

deifying the market. In the words of Héctor Díaz Polanco, the president of Morena in Mexico City:

[Morena] construct[ed] a new common sense, which included the fundamental task of demystifying everything that the triumphant, prevailing neoliberalism meant for the country. That was the structure that had to be defeated, which meant a very clear rejection of the idea that the market could solve society's problems. To recall the classic idea that the market can regulate itself, we began from the premise that the market cannot regulate itself and that all the country's problems stemmed from that initial idea.<sup>15</sup>

While the significance of the reforms should be acknowledged, it must be stated that neoliberalism is not simply corruption, nor can it be reduced to limiting the state's role in managing the economy. It is also closely linked to the reorganisation of production for export and, in Mexico's case, to the country's economic integration with the United States and the reinforcement of dependency this entails.

During the first 4T government – López Obrador's first term – the United States-Mexico-Canada Agreement (USMCA) came into force after being renegotiated by Enrique Peña Nieto's administration (2012–2018). Far from reversing the dependence created under NAFTA, the USMCA deepened it. The treaty expanded investment rights for US companies, removing barriers and prohibiting measures that might favour national production or regulate speculative capital flows. It also guaranteed preferential treatment for foreign financial services and prohibited nationalisation. While sovereignty

over hydrocarbons was formally preserved, more than one hundred extraction contracts with protections were initiated during Peña Nieto's energy reform.\* The agreement further liberalised the Mexican agricultural market, increasing imports of genetically modified products and limiting subsidies to local farmers. This in turn exacerbated food dependency in Mexico, which already imports 40% of the food it consumes from the United States.<sup>16</sup>

Although AMLO's government did not renegotiate the treaty, it endorsed the content and investor guarantees and shepherded it through ratification in Congress. The treaty preserved the profitability of domestic and foreign companies, consolidated the privilege of foreign capital in various sectors, weakened food sovereignty, and

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\* The country's energy sovereignty was guaranteed thanks to López Obrador's intervention. See Escobar, 'En el T-MEC quedó blindada la soberanía energética de México, reitera AMLO'.

reinforced land dispossession and the extractivist policies that rural communities had resisted since the rise of neoliberalism.\*

In the countryside, the adverse effects of the treaty were mitigated by the 4T governments through production subsidies for the domestic market.\*\* In this regard, two programmes stand out: Harvesting Sovereignty (Cosechando Soberanía) and Production for Well-being (Producción para el Bienestar), launched in 2025, which provide various forms of support and services to small- and medium-sized producers.<sup>17</sup> These were added to Sowing Life (Sembrando Vida), launched by AMLO, which aimed to provide farmers with financial and in-kind assistance ranging from community plant

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\* Economist Pierre Matari asserts that the neoliberal approach to the country's economic policy has not been significantly modified and that the reforms carried out by the 4T have left the accumulation regime centred on the export of goods and foreign direct investment untouched. Specifically, the treaty grants foreign companies national or favourable treatment in the financial services sector and eliminates the Mexican government's ability to regulate the flow of speculative capital. In 2023 the Mexican government issued a decree prohibiting the consumption of genetically modified corn in an effort to mitigate the harmful health effects of importing agricultural products permitted under the USMCA. This measure has been challenged by transnational companies that have taken the matter to USMCA panels, which ruled against Mexico in favour of the import of genetically modified corn. On the date the USMCA came into effect, the Mexican Network of People Affected by Mining (Red Mexicana de Afectados por la Minería) stated that the treaty continued the regulatory framework and mining policy that has allowed the devastation of communities. See Matari, 'La situación política económica del gobierno de la Cuarta Transformación', 147–148; Calderón Salazar, 'Análisis de algunos capítulos del T-MEC'; Jiménez and Sánchez Jiménez, 'AMLO: firme postura sobre maíz transgénico'; Alegría, 'Gana EU panel de maíz transgénico'; REMA, 'Con el TMEC se profundiza el modelo extractivo minero'.

\*\* The Mexico Plan (*Plan México*) presented by President Claudia Scheinbaum includes an investment of 53.971 billion pesos (roughly USD \$2.6 billion) for small- and medium-sized producers of corn, beans, rice, cocoa, and honey. See Government of Mexico, Presidency of the Republic, 'Presidenta presenta plan para garantizar la soberanía y la autosuficiencia alimentaria'.

nurseries to biofactories and training centres that formed agricultural learning communities, encouraging knowledge exchange and collective initiatives.<sup>18</sup> These policies have helped stabilise and in some cases reduce the prices of several products.

At the same time, although land dispossession remains one of the most damaging effects of trade agreements with the United States, the 4T has restored land to indigenous communities. The most notable case was the return of 2,900 hectares to the Yaqui people as part of the Plans for Justice and Comprehensive Development of Indigenous Peoples and Communities (Planes de Justicia y Desarrollo Integral de los Pueblos y Comunidades Indígenas).<sup>19</sup> These plans have introduced mechanisms to support community decision-making, establishing a consultation process that enables community participation that did not exist under previous governments.<sup>20</sup>

For the historian and Morena activist Armando Bartra, the 3,142 km border with the United States is an inescapable reality. Bartra asserts that, economically speaking, Mexico's proximity to the US is a comparative advantage that the 4T could not – and should not – have wasted, given that its foremost priority was to deliver immediate material improvements for the population:

When you come to power as part of the progressive left and you come from a process of exclusionary and impoverishing neoliberalism, you have a job, and that job is to reduce poverty. They are not telling you to build socialism. They are not telling you to break with capitalism. They are telling you to reduce poverty and restore hope. We want to live better, not worse

– we want our children to have a better life with us. We want that and, moreover, we elected you for that.<sup>21</sup>

To fulfil this mandate, the 4T adopted a comprehensive policy of ‘For the good of all, the poor come first’ (*Por el bien de todos, primero los pobres*). This follows the line of recent progressivism in Latin America, which Bartra referred to as ‘welfare revolutions’ centred on rebuilding the social fabric damaged by neoliberalism.\* To date, the 4T has lifted eleven million people out of poverty, both through social programmes and a 241% increase in the minimum wage.<sup>22</sup>

Meeting the essential goal of eliminating extreme poverty made breaking or transforming trade relations with the United States unfeasible in the short term, since Mexico lacks the infrastructure to implement an alternative model. Bartra argues that the 4T governments must now prioritise economic integration with Latin America, moving beyond their dependent relationship with the United States.<sup>23</sup> However, there is no consensus within Morena on this reorientation. Epigmenio Ibarra, a businessman and communicator close to the 4T, argues that integration with the United States is not only inevitable, but also essential for the country’s development.<sup>24</sup>

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\* Among the main redistribution policies of the 4T are welfare payments for disabled people and senior citizens and a programme for the children of working mothers. Together, the 4T programmes and policies resulted in a reduction in material poverty from 48.8% in 2018 to 43.5% in 2022, compared to an increase of 9.4% during Felipe Calderón’s administration and a reduction of 3.5% during the governments of Felipe Calderón and Enrique Peña Nieto, respectively. See Government of Mexico, CONEVAL, ‘Pobreza en México’; Bartra, interview.

A less debated but equally crucial aspect of economic treaties with the United States is Mexico's integration into the US security framework. NAFTA not only promoted economic cooperation but also laid the foundations for Mexico's participation in US arms production, the alignment of its armed forces with the US Northern Command, and the operation of US security agencies on its territory. This process reinforced a regional security paradigm under US control and direction, extending its influence beyond the economy into the strategic and military spheres.<sup>25</sup> The signing of the Security and Prosperity Partnership of North America (SPP) in 2005 advanced this integration project, which was given concrete form through the implementation of the Merida Initiative in 2008.\*

Mexico's integration into the US security framework has been justified as part of a strategy to combat organised crime under the guise of the so-called 'War on Drugs' launched by former president Felipe Calderón in 2006. It has since been proven that Calderón's secretary of public security had made a deal with organised crime involving the entire state apparatus and placing state institutions at the service of a cartel.\*\*

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\* Under the Merida Initiative, Mexico has received billions of dollars in weapons and military training. In 2013, Mexico received 154 million pesos, while Colombia received 279 million pesos under Plan Colombia. In the case of Mexico, these amounts are justified not only by the call to combat drug trafficking but also by the effort to curb migration at the country's southern border. In addition, also as a result of the Merida Initiative and SPP, agents of the DEA, CIA, and FBI are operating throughout Mexican territory. See Ceceña, 'La dominación de espectro completo sobre América Latina', 133.

\*\* The case against former Public Security Secretary Genaro García Luna, prosecuted by the US attorney in New York, accused García of receiving millions of dollars from the Sinaloa cartel as payment for facilitating cocaine trafficking to the United States. In October 2024, he was sentenced to thirty-eight years in prison. See Brooks, 2023 and Feuer, 2024.

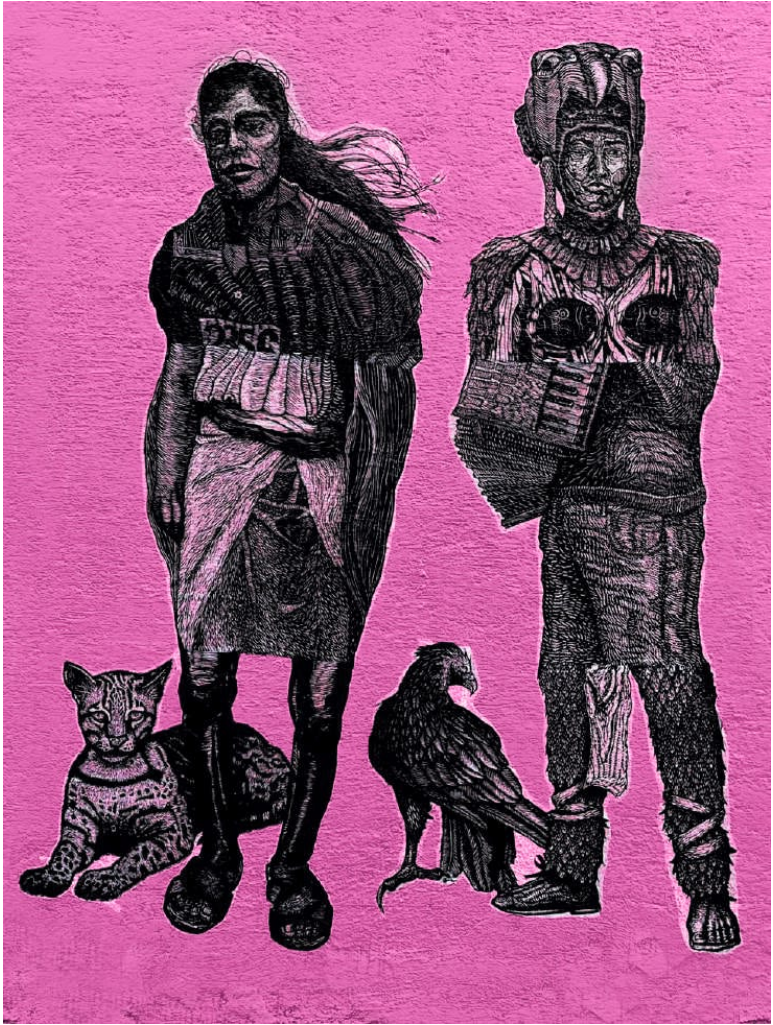
Far from pacifying the country or reducing criminal activity, the War on Drugs significantly increased levels of violence and militarised the country. Citlalli Hernández comments on this reality:<sup>\*</sup>

Neoliberal economic policies destroy the social fabric, but entrenched violence – as is already the case in several countries on our continent – is also an aggressive means of dismantling society. It is likewise a way of combating any form of resistance because it permeates society with a generalised fear that brings any process to a halt. We see this as going hand in hand with the imperialist project of the United States.<sup>26</sup>

The 4T's record with respect to its central objective – overcoming neoliberalism and the inequalities it produced – is positive despite the contradictions that remain. Beyond what has been achieved in terms of constitutional reforms, the ideological battle against neoliberalism has been consistent and forceful, paving the way for deeper transformations in the future.

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\* Official government figures report that 367,402 people were disappeared between 31 December 1952 and 9 July 2025, of whom 130,006 have not yet been located. The number of missing persons rose sharply from 2007 onward. Between 1952 and 2006 there were 70 disappearances per year on average, whereas the annual average since 2007 has been 17,000. See Interior Ministry of Mexico, National Search Commission, 'Versión Estadística RNPNDNO'.



## Regenerate and Redemocratisé

With regard to democratisation, Morena's project seeks to restore the people's central role in politics while overcoming neoliberal policies and the mistrust of government. This orientation is tied to the party's own formation, in which mass politics and grassroots participation have always been defining features, distinguishing it from the PRD. For Morena, this political process aims to generate a revolution of consciousness, which Rafael Barajas, director of Morena's National Institute for Political Education, describes as follows:

It was a profound revolution of consciousness, a process of transformation that went to the grassroots and drew on forms of protest and organising long discarded, such as study circles, political education, and door-to-door visits... This made it possible to overcome a highly effective control mechanism – and to do so peacefully, which had once seemed absolutely impossible.<sup>27</sup>

The 4T did not abandon the mobilisation and politicisation that brought it to power; rather, it adopted a popular mode of communication in line with its slogan 'First the Poor'. The morning presidential addresses known as *La mañanera* (The Morning Address), inaugurated by AMLO and continued by Sheinbaum, not only confront opposition from the media: they also seek to draw the people into the exercise of power. Using clear, everyday language, they report on government actions and foster direct dialogue with citizens.

This format positioned López Obrador as a central figure in the national discourse, since the topics discussed in *La mañanera* dominate the public agenda. This communication policy reinforces closeness to the people, projects transparency, and counters perceptions of corrupt politicians. At the same time, it has consolidated the 4T's political hegemony.

The transformation of consciousness promoted by the 4T entails a recognition of inequality and is articulated from the perspective of poor and everyday Mexicans. According to Teresa Rodríguez de la Vega, a university professor:

In every demand from the common people, from the masses, I think the oligarchy sees a threat... Because of course it is threatening – a process of class consciousness in a country as profoundly unequal as this one opens the door to revolutionary hypotheses with a transformative impact far, far beyond what the 4T can achieve.<sup>28</sup>

Whether or not the ideas advanced in Mexican humanism are radical, rooted in the country's historical left, or realised through the 4T programme is open to debate. What is much clearer is that they have managed to build the consensus necessary for Morena's electoral victories. For Epigmenio Ibarra, this consensus is only possible through a project that overcomes class divisions and enables all sectors of society to participate in the construction of a new country:

Humanism does not recognise the dominance of one class over another. It recognises – and this is its basic principle – that

for the good of all, of every class, the poor must come first. It does not speak of the predominance of one class but rather of the coexistence and cohabitation of classes, with one essential recognition: the poor come first.<sup>29</sup>

## The 4T as a Broad Hegemonic Front

The diversity within Morena is an undeniable factor behind its success and underscores the abstract and amorphous character of its political-ideological project. Morena has been a broad front since its inception – the only viable strategy, according to Epigmenio Ibarra, to regenerate the country, since earlier left formulations had become obsolete in a context that required the participation of all sectors of society.

Paco Ignacio Taibo II, a writer, political activist, and the director of the Economic Culture Fund (Fondo de Cultura Económica), told us that Morena faces a contradiction: its openness, while necessary to gain electoral strength, also enabled the inclusion of former PRI members and others with varying ideological affinities to the transformation project, generating internal tensions within its political structure.

Morena seeks to build a left-leaning political project. Yet its internal diversity reflects a broad ideological spectrum, in part due to

opportunistic affiliations that followed its consolidation as a dominant political force after coming to power. For the academic Diana Fuentes, this is not so much a result of Morena's current weaknesses but rather stems from more than a century of Mexican political culture, marked by corporatism and *caudillismo*:

Mexico is a country in which corporatism [is] a method of playing the political power game, of producing cadres, a fundamental factor in exercising power... which implies that when a political force emerges... it does not emerge alone. It is not just the individual political figure but rather: how many come with them? how many peasants? how many workers? how many? In other words, how many political forces are you bringing with you?<sup>30</sup>

The hegemony that Morena has built is evident in its overwhelming electoral victories, in its capacity to set the terms of national political debate, and in the absence of any real opposition from the right or any criticism or challenge to its project from the left.<sup>31</sup> It is clear that the mass and triumphant character of the 4T has subsumed other left currents, which today remain marginal in both political and discursive terms.

Héctor Díaz Polanco emphasises that the virtues of social movements are essential to building a process of the 4T's magnitude. As he explained in our interview, social movements operate through 'a process of democratic coordination, participation, and a sense of belonging with a profound social force that also nourishes the political party in positive ways'.<sup>32</sup>

For Bartra, the absence and relative weakness of the social left, both within and outside Morena's base, undermines the project's transformative capacity, since the very notion of being a party-movement implies the necessity of social struggle. As he told us:

Today we are an electoral party and not a movement, and I don't think we'll be a movement [for long] because the party's composition has changed. Today we have ten million members, most – nine out of ten – of whom have never had any organic participation in social life, unlike seven, eight, or nine years ago, when we founded the party.<sup>33</sup>

Bartra attributes this in part to the inability of social movements to shift from resistant opposition to active builders of a transformative government. Movements, he argues, continue to act as they did under repressive and neoliberal governments, when dialogue and inclusion in building a national project were virtually impossible.

For Diana Fuentes, the party has not played the role of bringing together the social forces that would strengthen the project through the actions of those involved in the struggle. As she explained:

The government is required to create mechanisms that enable political participation in those other spheres of life that make up the social fabric. And this, rather than being seen as a threat... is where natural leadership could emerge, along with strategic and, let's say, very clearly defined social demands in certain sectors of society that could feed into Morena's political ranks. Because, in my opinion, Morena's problem now, in

building its grassroots base, is that it continues to follow the logic that it must nurture political cadres for the state, but it is no longer thinking about the need for social leaders who can spearhead struggles arising from the tensions of the present moment.<sup>34</sup>



## Conclusions

The election of Claudia Sheinbaum in 2024 and her government's successful performance challenge the view of the 4T as AMLO's personal project. As Teresa Rodríguez de la Vega noted in the interview quoted above, the intention to establish a regime capable of both transformation in terms of constitutional reforms and the exercise of power is clear and irreversible.

The second package of 4T transformations, known as the 'second floor', still faces enormous challenges. As Rafael Barajas observed, the collapse of the opposition parties does not mean that the 4T is without formidable enemies:

The enemy is international big capital; it is the government of the United States, the international right, the Atlas Network. It is not a minor enemy... It is a far more potent and powerful enemy, and a dangerous one. It is a very formidable enemy, not least because it has no ethical qualms, no humanistic outlook, and is extremely destructive and, it must be said, utterly monstrous.<sup>35</sup>

Undoubtedly, establishing a relationship with Trump's United States on terms that reaffirm national sovereignty is a top priority for Sheinbaum's government. The elimination of poverty and inequality remains unfinished and, according to Armando Bartra, will require new strategies. It is not enough to simply continue along the current path; there must be second-generation reforms that tackle multidimensional poverty.

In this context, the role of the party-movement in proposing and promoting the next wave of transformations is indisputable. In our interview with university professor Diana Fuentes, she stressed the importance of a process of democratisation within the party to create spaces for debate and criticism of the government, thereby deepening the transformation and curbing the bureaucratisation to which any government is vulnerable.

Rafael Barajas argues that popular assemblies, centred on debating the national project, are an essential tool for grounding the 4T in the grassroots and turning the people into protagonists and drivers of the government programme. In his view, without this active, programmatic participation of citizens in the discussion and construction of the project, Morena risks becoming merely an electoral machine and repeating the same mistake of other progressive processes in the region, which pushed the people out of governance and mobilised them solely for electoral support. Citlalli Hernández summarises these challenges:

The threats today are different, and in this sense Morena's challenge is not to fall into bureaucracy, institutionalism for institutionalism's sake, or a lack of criticism and self-criticism. We must not fall into the trap of thinking that our victory is already complete. Perhaps the greatest challenge will be to achieve three things: to exercise power, to maintain good governance, and to continue winning over the Mexican people so that they accompany this project.<sup>36</sup>





## Notes

- 1 Escalante Gonzalbo, 'México antiguo'.
- 2 González Casanova, 'El Estado', 21–98.
- 3 Piñeda Gómez, 'Ejército libertador'.
- 4 López Obrador, *¡Gracias!*
- 5 Benítez, *Lázaro Cárdenas*.
- 6 Bartra, *Los nuevos herederos de Zapata*.
- 7 Benítez, *Lázaro Cárdenas*.
- 8 Bartra, *Los nuevos herederos de Zapata*.
- 9 Taibo, *Bolcheviques*.
- 10 Cedujo Ramos, 'Disputas por la modernización'.
- 11 Torres-Ruiz, 'Historia del PRD'.
- 12 Bartra, 'Por un Partido'.
- 13 Tello, *Estado y desarrollo económico*.
- 14 Romero, 'Reformas y soberanía'.
- 15 Díaz Polanco, interview, our translation.
- 16 Calderón Salazar, 'Análisis de algunos capítulos'.
- 17 Government of Mexico, 'Programas para el Bienestar'.
- 18 Government of Mexico, 'Gaceta Sembrando Vida'.
- 19 Government of Mexico – INPI, 'Inicia restitución'.
- 20 Government of Mexico – INPI, 'Planes de Justicia'.

- 21 Bartra, interview, our translation.
- 22 World Bank, 'Poverty'; Government of Mexico, 'Evolución del salario mínimo'.
- 23 Bartra, interview, our translation.
- 24 Ibarra, interview, our translation.
- 25 Sandoval Palacios, 'El TLCAN'.
- 26 Hernández, interview, our translation.
- 27 Barajas, interview, our translation.
- 28 Rodríguez de la Vega, interview, our translation.
- 29 Ibarra, interview, our translation.
- 30 Fuentes, interview, our translation.
- 31 Mondonesi, 'La hegemonía'.
- 32 Díaz Polanco, interview, our translation.
- 33 Bartra, interview, our translation.
- 34 Fuentes, interview, our translation.
- 35 Barajas, interview, our translation.
- 36 Hernández, interview, our translation.

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# Interviews

Conducted in May 2025 by Stephanie Weatherbee and Alina Duarte for this dossier.

1. Rafael Barajas: President of the Morena National Institute of Political Training (Instituto Nacional de Formación Política de Morena).
2. Armando Bartra: Sociologist, author, and member of the Internal Council of the Morena National Institute of Political Training (Consejo Interno del Instituto Nacional de Formación Política de Morena).
3. Hector Díaz Polanco: Anthropologist, author, and president of the Morena State Committee Mexico City (Comité Estatal de Morena Ciudad de México).
4. Diana Fuentes: Philosopher and academic at the Autonomous Metropolitan University and the School of Philosophy and Letters of the UNAM (Universidad Autónoma Metropolitana y de la Facultad de Filosofía y Letras de la UNAM).
5. Citlalli Hernández: Secretary of women's affairs in the government of President Claudia Sheinbaum Pardo and former general secretary of Morena.
6. Epigmenio Ibarra: Journalist and producer.
7. Teresa Rodríguez de la Vega: Sociologist and professor at the School of Political and Social Sciences of the UNAM (Facultad de Ciencias Políticas y Sociales de la UNAM).
8. Paco Ignacio Taibo II: Author, Morena activist, and director of the Economic Culture Fund (Fondo de Cultura Económica – FCE).



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