

MEXICAN

Military Culture

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The FIU-USSOUTHCOM Academic Partnership Military Culture Series

Florida International University's Jack D. Gordon Institute for Public Policy (FIU-JGI) and FIU's Kimberly Green Latin American and Caribbean Center (FIU-LACC), in collaboration with the United States Southern Command (USSOUTHCOM), formed the FIU-SOUTHCOM Academic Partnership. The partnership entails FIU providing research-based knowledge to further USSOUTHCOM's understanding of the political, strategic, and cultural dimensions that shape military behavior in Latin America and the Caribbean. This goal is accomplished by employing a military culture approach. This initial phase of military culture consisted of a yearlong research program that focused on developing a standard analytical framework to identify and assess the military culture of three countries. FIU facilitated professional presentations of two countries (Cuba and Venezuela) and conducted field research for one country (Honduras).

The overarching purpose of the project is two-fold: to generate a rich and dynamic base of knowledge pertaining to political, social, and strategic factors that influence military behavior; and to contribute to USSOUTHCOM's Socio-Cultural Analysis (SCD) Program. Utilizing the notion of military culture, USSOUTHCOM has commissioned FIU-JGI to conduct country-studies in order to explain how Latin American militaries will behave in the context of U.S. military engagement.

The FIU research team defines military culture as "the internal and external factors — historical, cultural, social, political, economic — that shape the dominant values, attitudes, and behaviors of the military institution, that inform how the military views itself and its place and society, and that shape how the military may interact with other institutions, entities, and governments." FIU identifies and expounds upon the cultural factors that inform the rationale behind the perceptions and behavior of select militaries by analyzing historical evolution, sources of identity and pride, and societal roles.

To meet the stated goals, FIU's JGI and LACC hosted academic workshops in Miami and brought subject matter experts together from throughout the U.S., Latin America and the Caribbean, to explore and discuss militaries in Latin America and the Caribbean. When possible, FIU-JGI researchers conduct field research in select countries to examine these factors through in-depth interviews, focus groups, and/or surveys. At the conclusion of each workshop and research trip, FIU publishes a findings report, which is presented at USSOUTHCOM.

The following report is part of the Florida International University—United States Southern Command Academic Partnership. United States Southern Command provides funding to support this series as part of its academic outreach efforts. Academic outreach is intended to support United States Southern Command with new ideas, outside perspectives, and spark candid discussions. The views expressed in this findings report are those of the authors and do not necessarily reflect the official policy or position of the United States Government, United States Southern Command, Florida International University, or any other affiliated institutions.

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EXECUTIVE SUMMARY

The analysis presented in this report argues that rather than a single coherent and unified “military” culture, Mexico has two separate and distinct military cultures: That of the Mexican Army, which is better known and predominates, and that of the Mexican Navy, which is less well known and clearly secondary. Both the army and navy were integral to the *Secretaría de Estado de Guerra y Marina* (Secretariat of State of War and Navy), one of the first four governmental institutions created post-Revolution in 1821. The structure was not unlike the U.S. Department of War (founded in 1787) and the separate Department of the Navy, although, in the United States, the two were independent organizations. The Mexican Army was much larger in terms of budget, personnel, and political strength. This organizational arrangement endured until 1939, when the navy became an independent agency and its culture began to emerge. Nonetheless, even then it remained a decidedly secondary force. For its part, the Mexican Air Force has no real independent culture because it remains subordinate to the *Secretaría de la Defensa Nacional* (Secretariat of National Defense), in essence, an army air corps in everything but name.¹

The aforementioned distinction notwithstanding, it is fair to say that Mexican military culture writ large (i.e., both army and navy) may be considered as “nationalist” in keeping with the political culture that ensued following the 1910 Mexican Revolution. The origins of Mexican military culture predate the Spanish conquest. Mexico’s martial history, present from the creation, was built upon the foundation of the warrior ethic of the Aztecs (and other warlike cultures) and refined by the Spanish conquest and subsequent armed activities through the civil war known in Mexico as *la Revolución* and its aftermath.² For its part, naval culture has its beginnings in 1821 at the outset of Mexican independence from Spain. The first individual to govern independent Mexico was Agustín de Iturbide (known as Agustín I), self-proclaimed Emperor of Mexico. He was named *Generalísimo* of Arms of Sea and Land, or *Generalísimo* Admiral. This was due, in part, because Spain refused to recognize Mexico’s independence until 1836, and as such, remained the primary threat to the young republic. In fact, the port of Veracruz would play an important role over the

course of post-independence Mexican history, beginning with the need to defend it from Spanish incursions from the outset to guarantee independence.³ Subsequent interventions at the port of Veracruz would be conducted by the French (1838-1839 and 1862-1867) and the United States (1846-1848 and 1914).

A key aspect contributing to the evolution and development of the army and navy cultures has been the process of professionalization, undergirded significantly by the establishment of military schools charged with forming leadership as part of the post-revolution institutionalization process. The consolidation of the country's political institutions into that of the military services – *Secretaría de la Defensa Nacional* (SEDENA) and *Secretaría de la Marina* (SEMAR) – lead us to the analysis of the crucial moment of modern military development. In 1946, the unwritten Civilian-Military Pact set the stage for the turnover of political power from the military to civilian leadership. It is not until this point that we observe the emergence of the doctrine of loyalty by the armed forces to the civilian-led political institutions established in the 1917 Constitution, principal among which is the absolute subordination to the president. The stability of the civil-military relationship post-1946 was solidified largely because of the relative autonomy delegated by the president to the armed forces in terms of resource management, institutional organization, and doctrinal development in training and operations.

As the subsequent analysis will show, present-day military culture in Mexico remains bifurcated between the more well-known and dominant army culture and a relatively unseen navy culture. Only within the past few years have serious efforts to reduce the distance between the “cousins” (they refer to each other as *los primos*) been undertaken. Despite those efforts by senior service leadership, each service acts mostly independently, interservice rivalry is alive and well, and fundamental change in the short-term is unlikely.

MILITARY CULTURE AND THE MEXICAN CASE

As we delve into the subject of Mexican military culture, let us begin with the meaning of “culture.” The concept of culture is complex, with many nuances, but at its most basic, we part from Webster’s “the customary beliefs, social forms, and material traits of a racial, religious, or social group.” The social group is often understood as people from individual nations. To cite an example that the majority of Americans can relate to, Samuel Huntington described American culture in this way:

America’s core culture has primarily been the culture of the 17th and 18th century settlers who founded our nation. The central elements of that culture are the Christian religion; Protestant values, including individualism, the work ethic, and moralism; the English language; British traditions of law, justice, and limits on government power; and a legacy of European art, literature, and philosophy. Out of this culture the early settlers formulated the American Creed, with its principles of liberty, equality, human rights, representative government, and private property.⁴

Although this description is of a unique culture, we note the characteristics that shape other cultures: When the countries were founded or colonized; the role of religion, coupled with its inherent values; language; legal traditions; and art, literature, and philosophy. These characteristics shaped Mexican culture over the years as well.

Mexico is one of 19 Latin American countries, sharing many of the general characteristics that emerged when Spain colonized much of the Western Hemisphere. Although there are many positive elements to observe throughout the region, two unfavorable aspects are legacies of authoritarian tendencies and continued elevated levels of poverty. While not determinative, culture plays an important role in this unfortunate reality. As culture expert Lawrence Harrison observed:

Why have no countries in Africa, Asia and Latin America other than

the East Asian dragons made their way into the elite group of affluent countries? The conventional diagnoses that have been offered during the past half century – exploitation, imperialism, education and know-how short-falls, lack of opportunity, lack of capital, inadequate markets, weak institutions – are demonstrably inadequate. The crucial element that has been largely ignored is the cultural: that is to say, values and attitudes that stand in the way of progress.⁵

The values and attitudes of most Latin American societies reflect the effects of 300 years of Spanish colonial rule superimposed on top of warlike pre-Columbian societies. As political scientist Howard J. Wiarda noted:

Latin America, colonized and settled in the 16th century, was premodern and felt the full weight of medievalism in the form of an authoritarian political regime from top to bottom, a feudal landholding system and mercantilism in the economic sphere, a rigid two-class society without a large or solid middle class, an educational system based on rote memorization and deductive, unscientific reasoning, and a religious pattern of absolutism and orthodoxy that buttressed and reinforced the state concept.⁶

Unlike the United States, founded in the 17th and 18th centuries, the countries of Latin America preceded the U.S. experiment. In the Latin American case, the combination of 16th-century political values – medieval, authoritarian, feudal, mercantilist – layered on top of existing warlike and authoritarian civilizations was likely to produce a culture that maintained a tradition of authoritarian rule and feudal economic characteristics. This is not to say that countries are condemned to a future with no opportunity to change or improve, but rather the role of historical-cultural tendencies is important to consider.

As is the case with all countries, the evolution of military culture in Mexico

is a product of multiple factors, both external and internal, as well as the country's social, political, and military history. The role of geography and history is important, but the part played by a nation's society itself is critical. We posit that, as the values and attitudes of society play an enormous role, the nation's military is a subset of society itself. This report will examine how geography, history, and society shaped the evolution of Mexican military culture.

HISTORICAL EVOLUTION OF THE MEXICAN ARMED FORCES

As with every nation's armed forces, historical forces have shaped the culture and identity of the Mexican armed forces. More than 2,000 years ago, small groups of indigenous peoples occupied lands in what is now recognized as the southwest United States, the Republic of Mexico, and parts of Central America, where they lived, worked, and battled each other. These groups trained and conducted aggressive military-like operations. It is no coincidence that the two senior colleges that train future generals and flag officers use the symbology of pre-Columbian armies. In terms of heraldry and symbolism, the *Colegio de la Defensa Nacional* (National Defense College) and the *Centro de Estudios Superiores Navales* (Center for Superior Naval Studies) are inspired by the courage of the Aztecs. Nonetheless, their defeat by the Spaniards was due, in large part, to the employment of superior technology: The Aztec Army was caught off guard when confronted with an unknown technology of greater destructive power used during the Conquest.⁷ One of many examples of how the Mexican armed forces pay homage to the heroism of the Aztec warriors (*guerreros Aztecas*) took place relatively recently when SEDENA's military industry (*la Dirección General de Industria Militar*) developed an organic rifle in 2005. Just as weapons are referred to by numeric nomenclature (M1911, M-16, M-2, etc.), the Mexican Army also uses names. In this case, the FX-05 is also known as the *Xiuhcōatl*, meaning Firesnake in Nahuatl, the indigenous Aztec language. The *Xiuhcōatl* was used by Aztec warriors, a flaming stick to combat their enemies.⁸

The indigenous armies were dissolved on August 13, 1521, with the loss of political and military power when the last Aztec *Tlahtoani*, Cuauhtémoc, surrendered

as a prisoner to Cortés at Tacuba.⁹ Subsequently, during 300 years of colonial domination, the Spanish armed forces had two primary functions: Protecting the trade between America and Spain against piracy, for which the naval forces and coastal fortifications were key; and ground armies for inland conquest, maintaining order, and controlling the borders, mainly in the north, to guard against incursions by nomadic tribes. For most of the colonial period, until the second half of the 18th century, sporadic popular or indigenous rebellions were quelled using private forces recruited and paid for by landowners.¹⁰

Centuries later, the combination of Napoleon's efforts in Spain (beginning in 1808) and a growing independence movement in New Spain, as the colonized territory was called, led to the eventual collapse of the Spanish Army between 1819 and 1821 at the end of the War of Independence (1810-1821). A former general officer of the royalist army, Agustín de Iturbide, was the first to govern independent Mexico due to his ability to unify the insurgent military forces in the first Mexican Army, founded on March 1, 1821.¹¹ Because he had belonged to the Spanish military forces, Iturbide envisioned himself as the first monarch of Mexico; he proclaimed himself emperor on May 19, 1822, as Agustín I. Although the initial governmental department after independence was that of the *Secretaría de Estado de Guerra y Marina*, the Mexican Navy celebrates its founding in 1821 while the current army dates its origins to the 1913 revolution. As the navy likes to note, Mexico has had many armies, yet it has had only one navy.¹²

As stated above, the Mexican Navy (SEMAR) was established in 1821. That means there has been only one navy in the history of post-independence Mexico. The navy has always been much smaller in terms of manpower, materiel, and budgets. Indeed, at its inception the navy had no "ships of the line" to call its own. In 1822, Mexico acquired its first ships from the United States and would later contract former U.S. Navy Captain David Porter to assist in the development and training of the first Mexican naval squadron. Porter served as the Commander of the Mexican Navy from 1826-1829; during that time, Mexican naval forces managed to force the Spanish

armada to withdraw from Mexican waters and challenge Spanish forces around Cuba. Perhaps for this reason, the Mexican Navy has always had a slightly different view on its relationship with the United States. Moreover, due to the roles and missions of navies, the navy has traditionally been on the periphery, not simply geographically, but also regarding the political evolution of the country. This is not to minimize the role of the navy over the years, but to recognize that its impact was marginal compared to the more significant role of the land forces.

Once control of the government was taken over, and the empire was established in October 1821, the army was named the Mexican Imperial Army. The imperial government had an ephemeral life of eight months, when Iturbide abdicated to the Congress on March 19, 1823, due to strong pressure exerted by the Liberal-Republicans.¹³ Between 1823 and 1857, until the liberals consolidated as a political force, armies were not professional and were subordinate to a leadership that was, by turns, liberal or conservative.

During the 19th century, despite uneven levels of professionalization, the armed forces, especially the land component, constituted the most important governmental institution in Mexico. Formal educational institutions were created to impart additional influence on the formation of Mexican military officers.¹⁴ When the country obtained its independence in 1821, the rebels had 20,000 well-armed men at the most critical moments of the war of independence (one soldier per 500 inhabitants).¹⁵ In 1867, immediately after the French intervention, the federal army had 70,000 men (one soldier per 171 inhabitants), and at the start of the Porfirio Díaz government in 1884, the army had 30,000 men¹⁶ (one soldier per 367 inhabitants). Between 1900 and 1910, the number of men-at-arms fluctuated between 25,000 and 30,000, for an average of one soldier for every 530 inhabitants.¹⁷

For 125 years, the government of Mexico relied heavily on its armed forces. Mexican citizens, by and large, perceived the government as the “Mexican state,” and this entity was one of the most militarized on earth. Beginning with the proclamation

of independence from Spain in 1821 until 1946, the armed forces and political-military leaders were the driving force of political affairs in the country. All indicators demonstrate that the government's rulers came from the military, their influence as the builders of the major political forces was dominant, and the maintenance of legal and political autonomy of the armed forces with respect to the rest of the state apparatus and civilian society was protected.¹⁸

It is important to note that since 1934, when General Lázaro Cárdenas took office as president, presidents have been instated and removed through constitutional fora. The statistics are conclusive about the country's considerable political instability in the periods from 1821 to 1876 and 1910 to 1934. Furthermore, of the 68 presidents that Mexico had between 1821 and 2000, 29 were civilians (including two clergymen), 39 were military men, and there were four civilian-military juntas. There is another indicator of great political instability: In fact, Mexico had 36 presidents between 1821 and 1857 alone. Further, the Mexican-American War (1846-1848) also took place during this period of political volatility.

Similarly, during numerous historical periods, Mexico had various governments that simultaneously vied for control in different parts of the territory. This occurred during the internal battles between liberals and conservatives throughout the French intervention (1855-1867) and even more disruptively during *La Revolución* between 1911 and 1920 when it had 10 presidents.

TWO WATERSHED MOMENTS

Countries with hundreds of years of history, like the United States and Mexico, have numerous eras that contribute significantly to their evolution. For example, trying to comprehend the United States without knowledge of Native Americans, the arrival of the Pilgrims and the subsequent colonization period, the Founding Fathers and the Revolutionary War, slavery, the Civil War and Reconstruction, Manifest Destiny, two World Wars and the Cold War, and the civil rights movement would result in an incomplete understanding. Many of those events helped shape

the development of the country's armed forces. Similarly, an effort to begin to grasp Mexico's complexities without a rudimentary knowledge of key periods would leave one ill-equipped to understand Mexico today. The two watershed events in modern Mexican history are the Mexican-American War of 1846-1848 and *la Revolución* of 1910-1920. These watershed events, and Mexico's military success against France, reaffirmed the doctrines that led to a broad military culture of non-intervention in external affairs. Presidential doctrines were declared, such as that of Benito Juárez in 1867, that "respect for the rights of others is peace," after Mexican liberal forces managed to defeat French imperial forces, or Venustiano Carranza's "non-intervention" policy in 1917.

In the case of the Mexican-American War, the succinct version is that a confluence of an expanding U.S. territorial ambition under the emerging doctrine of Manifest Destiny, coupled with the continuing political instability and weakness in newly independent Mexico, facilitated the "transfer" of more than half of Mexico's territory to the United States in 15 years.

Viewed in isolation, one might get lost in the nuances of domestic politics in each country and the broader bilateral relationship between the two young republics. Yet, if one considers geostrategic concerns, it was probably just a matter of time for the United States to take the required actions to achieve its desire for a secure continental territory.¹⁹

While U.S. President James K. Polk may have preferred to acquire Mexican territory via negotiation and payment rather than go to war, and may have believed it would be short, the reality proved quite different. The conflict lasted 16 months and cost both countries dearly in blood and treasure. The military details of the war are filled with tactical innovation and brilliance, and valor on both sides. The U.S. Army displays 10 streamers for the Mexican War; there were campaigns in Texas, California, the Pacific Coast, Northern Mexico, and Mexico City. The siege and amphibious assault by Major General Winfield Scott against Veracruz in March

1847 represented one of the first operations of its kind. Scott maneuvered his forces from Veracruz to Mexico City, earning battle streamers at Cerro Gordo, Contreras, Churubusco, Molino del Rey, and the culminating victory at Chapultepec Castle on September 13, 1847, which concluded the war. The last fortress held by the Mexican Army was located at Chapultepec Castle; it had tactical value as it was heavily fortified, sat on a 200-foot hill, and dominated much of central Mexico City. It also held symbolic and emotional importance for Mexico because it was built during the colonial period as a royal castle for the Viceroy (the only royal palace in the Americas), and at the time, served as the Mexican military academy. General Nicolás Bravo occupied the position with between 1,000 and 2,000 men, including the corps of cadets of the Mexican Army's military academy.

In the war itself, and this final battle in particular, we find certain seeds of Mexican self-resentment and internally oriented shame. Because of the young country's lack of unity, the collective nation did not defend itself as it could and/or should have. When the federal government requested men to augment its forces, many states answered in the negative, saying in essence, "Not our problem." It is one thing to lose a fight fair and square; however, it is another to have an invading force of lesser size and capability invade your territory and defeat you on your own turf. Beyond legitimate anger and animosity against the enemy, the indignity and dishonor of not having united as a nation is a factor that must be considered.

One of the legacies of this war was the emergence of the myth and legend of the *Niños Héroes* (the Child Heroes). In its briefest form, the governmental story – which appeared in official textbooks throughout the country – indicated, among other heroic feats, that Juan Escutia wrapped himself in the Mexican flag and threw himself over the wall to his death, preferring that to allowing the invaders to sully the standard. His valiant action, accompanied by the deaths of five other cadets, was a rallying cry for the Mexican Army to defend the country against an invading force (the U.S. Army).

The long-term implications of these major events have had significant implications for the fundamental nature of the bilateral relationship between the United States and Mexico. In ways large and small, they continue to influence virtually every interaction between the two countries. As historian Michael Scott Van Wagenen said, “the memory of the U.S.-Mexican War” has been “indelibly etched in the minds of Mexicans and ... is easily overlooked by Americans.”²⁰

Sixty years later, Mexico underwent a second and arguably more profound watershed event. The legacy of *la Revolución* is enormous and difficult to synthesize or overstate. It was, without question, one of the defining events in Mexican history. As far as the impact on the Mexican Army, there were four “armies” – all composed of Mexican “soldiers” – fighting against each other. Soldiers loyal to Pancho Villa, Emiliano Zapata, “constitutionalist” forces led by Venustiano Carranza, and other forces fighting for General Alvaro Obregón were engaged in prolonged combat throughout the country. The period was highly dynamic, with shifting loyalties and alliances; fighting ebbed and flowed over time. The period was further complicated by U.S. interference in varying ways – channeling assistance to one side, selling weapons, and moving troops by U.S. rail, which further strengthened Mexican resentment of U.S. involvement in its internal affairs.

The period of 1910-1920 affected the life of every Mexican citizen. To this day, no one is quite sure how many perished during this timeframe, with estimates in the range of one to two million deaths. Even low-level estimates note one million losses out of a population of approximately 15 million (according to the 1910 census), which far exceeds the rate of the U.S. Civil War. As a result of the violence endured by the people, for many years, most citizens would choose virtually any solution other than war to achieve their objectives. A general perception that the army was not a force for good would lead to strong efforts to reduce its influence in national affairs.²¹

Given Mexico’s history as a country with a centralized political system organized around the figure of the president, coupled with being besieged militarily

by foreign powers up to 1917, we observe a doctrine of national security based on “the people,” centered on the Mexican Revolution. This led to the armed forces being sustained primarily by the land army with a focus on the primary military-based threats being internal, the most recent of which are centered on criminal groups that emerged toward the end of the twentieth century.

After years of instability and internal turmoil, a consolidated Mexican state had been finally formed through autocratic military governments, especially that of General Porfirio Díaz (1876-1911)²² and later, the post-revolutionary regime. However, widespread armed conflicts between multiple warring groups (1911 to 1917) and internal military conflicts (1926 to 1929) between the two competing powers were characteristic. It is essential to bear in mind that there have been only two extended periods of true governmental stability: Díaz as head of the Conservative Party and the Institutional Revolutionary Party (*Partido Revolucionario Institucional* or PRI). Both were characterized by their authoritarian nature, holding non-democratic elections to legitimize the regime, and centralized power, in which a key aspect is the presence of armed forces loyal to the regime.

In the case of Porfirio Díaz, at his zenith, he was a ruthless and authoritarian dictator who ruled the country as he saw fit. The true father of modern Mexico, Díaz consolidated 35 years of power because he had his own army. He modernized Mexico, bringing in railroads, building and improving ports, and developing a modern sewage system in Mexico City and the country’s first oil wells.

Díaz also contributed heavily to the idea of loyalty to leadership instead of the country or the constitution. The army was loyal to him. He had built it over time – in essence two generations of officers and soldiers – and they did his bidding. Elements of corruption throughout Mexican society were inherited from the Spanish colonizers and their feudal and corporatist past, and the armed forces are not immune to its corroding influence to this day.

For its part, the PRI dominated the post-*Revolución* political scene for more than 70 years as a political machine (1929 to 2000). Peruvian writer Mario Vargas Llosa describes it as “the perfect dictatorship.” In 1988, political scientist Howard J. Wiarda characterized the system as “a corporatist-bureaucratic-authoritarian regime:”

The system is authoritarian in the sense that one party, the *Partido Revolucionario Institucional* (PRI), has monopolized the national political life for six decades. It is top-down and “democratic-centralist” almost in a Leninist sense. It is bureaucratic in that it is a machine and a system that governs Mexico, not any single individual. It is corporatist in that the PRI incorporates within its ranks the major corporate or functional groups in Mexican workers, peasants, and the so-called “popular” sector which is supposed to include all others.²³

The remaining periods of government, between 1821 to 1876 and 1910 to 1934, were characterized by a lack of military professionalism and control by armed militia forces, in which troops were mostly composed of peasants under local bosses (known in Spanish as *caciques*). These periods were marked by intense struggles between non-professional military leaders, state governments, and the federal government to control local activity. Political and economic instability was also characterized by the fragmentation of power and political control through the use of the armed forces and foreign interventions. In times of political stability, there was economic growth and military professionalism, and foreign powers recognized the government.

The net effect of this uneven development led to a “non-offensive defensive” military culture, the emergence of a robust military nationalism, and a Presidential-loyalty dogma post-1946 when the first civilian (Miguel Alemán) was installed as president in the post-revolutionary period. Mexican military officers are proud that, since 1920, Mexico has not experienced a change of government by a military coup, a stark contrast to most of Latin America. They attribute this in large part to loyalty to

political power for 100 years. For this reason, discipline and loyalty rank high as the most important values for the Mexican armed forces. As Roderic Camp notes, "Military discipline means unquestioning, unyielding deference and obedience to superiors. No order is questioned, and no action is taken independently of a superior."²⁴ It is a culture quite different from the United States, in which initiative is encouraged and rewarded. This type of loyalty is characteristic of both the army and navy cultures. The cynic might point out that given the nature of the PRI regime — former general officers as presidents from 1920 to 1946, and significant independence — there was no incentive to stage a coup.

PROFESSIONALIZATION: MILITARISM, INDEPENDENCE, AND REVOLUTION

The first phase of military professionalization occurred during the Porfirio Díaz presidency, with acknowledgment of rank and promotion systems and the strengthening of military schools, with the *Heróico Colegio Militar* (then located at Chapultepec Castle) as the key pillar. At the end of the nineteenth century, half of the officers on active duty were graduates of the Military Academy. That said, the academy produced few general officers. The majority of the generals began as members of the liberal military elite of the Benito Juárez period that had fought against the French during the 1867-1873 French intervention. Most of the weaponry available to the armed forces was acquired from France and Germany. During the Díaz regime, another paramilitary force was created, known as the "*rurales*." It served as Díaz's Praetorian Guard and became the central element in the so-called "Pax Porfiriana." This praetorian guard was strengthened considerably, and it had about as many men as the army. There were up to 27,000 men-under-arms at the beginning of the 20th century. Between the army and the *rurales*, the entire country was protected by forces loyal to Díaz.

For its part, the Naval Academy – *la Heróica Escuela Naval* – was established in 1897 at the port of Veracruz,²⁵ which was chosen given its importance both as a port and for its historical role. At the outset, some cadets from the military academy – *el Heróico Colegio Militar* – were integrated into the naval academy and

eventually became naval officers. On numerous occasions during Mexican history, the port of Veracruz was the site of defenses of Mexican sovereignty. Among the most storied was the heroic resistance put up during the intervention by a U.S. naval force of superior strength on April 21-22, 1914, amid *la Revolución*. These multiple defenses of Veracruz over time have contributed to the naval culture that has emerged in SEMAR.²⁶

With this background, we posit that the psychological and cultural base of the Mexican military was established with the defeat by the invading Spanish conquistadores in 1521. During the 19th and the first half of the 20th centuries, in addition to internal armed conflicts and attempted coups, foreign military interventions were an added element preventing the Mexican state's consolidation. Spain kept its armies at the fort of San Juan de Ulúa in Veracruz after 1821 and attempted a "reconquest" in 1829. France attacked Veracruz in the 1837-1839 timeframe to collect debts owed by Mexican citizens. Continuing internal disputes between conservatives and liberals rose to the level of armed conflict in what is known as the War of the Reform (1858-1861), which, in turn, led to a situation in which French forces intervened in Veracruz in December 1861. In this iteration, these forces remained and occupied Mexico. At the invitation of Mexican conservatives, Napoleon III appointed Ferdinand Maximilian of Austria as the Emperor of Mexico. He reigned from May 1864 to May 1867 and was executed on June 19, 1867.

For its part, the United States played an even larger and unhelpful role perpetuating Mexican political instability:

- The U.S. state of Texas was an integral part of Mexico upon its formal independence from Spain in 1822. Texas became an independent republic in 1836 and a U.S. state in 1845. Neither of the latter two events was formally recognized by the Mexican government at that time.
- After President James K. Polk's machinations led to "American blood spilled on American soil," the U.S. Congress declared war on Mexico in May 1846.

U.S. forces operated in Mexico for more than 18 months, including occupying Mexico City. The war ended with the signing of the Treaty of Guadalupe Hidalgo in February 1848. In addition to Texas, approximately two-thirds of Mexico's former territory (the present-day states of California, Arizona, New Mexico, Nevada, Utah, and portions of Colorado and Wyoming) was ceded to the United States, which paid \$15 million to Mexico for war costs and reparations.

- During *la Revolución* (February 1913), U.S. Ambassador Henry Lane Wilson colluded with enemies of President Francisco I. Madero to stage a coup in events known as *la decena trágica* (the Tragic Ten Days). Lane, apparently without the direction or even knowledge of President William Howard Taft, offered the U.S. Embassy as headquarters for devising the plan to defeat Madero and the revolution. The government of Madero was unrecognized, and the provisional presidency of Victoriano Huerta would begin in 72 hours. Madero and his Vice President, José María Pino Suárez, were forced to resign. While being transported to the federal penitentiary in Mexico City under the control of the army, they were both murdered under mysterious circumstances. The United States was complicit in the killing of the father of Mexico's revolution.²⁷
- Admiral Frank Friday Fletcher led the occupation of Veracruz (often referred to in Mexico as the second U.S. intervention) from April through November 1914. This action was ordered in response to the Tampico Affair and occurred in the middle of *La Revolución*.²⁸
- Brigadier General John J. "Black Jack" Pershing led an expeditionary force of approximately 10,000 soldiers into northern Mexico (an event known in Mexico as the Punitive Expedition and the third U.S. intervention) from March 1916 to February 1917. The campaign was in retaliation for a raid by forces of Francisco "Pancho" Villa on U.S. territory in New Mexico. Pershing never found Villa.

Although these events are ancient history for a U.S. audience, they scarred the Mexican national psyche. This was especially pronounced for those who serve in the profession of arms.²⁹

Even though one of the vying factions – Venustiano Carranza and his Constitutionalist Army – managed to consolidate sufficient power to govern from 1917 to 1920 (when he was assassinated), the fighting continued. Exhausted – physically, mentally, and emotionally – from 10 years of civil war and having lost approximately a tenth of its population, Mexico began its version of reconstruction in 1921. Because the schisms were more complex than the U.S. Civil War, satisfying all parties was an impossibility.

Nonetheless, the country began the early 1920s in a relatively peaceful fashion with the solid performance of General Álvaro Obregón as president. The 1920s were characterized by political-military control of all the armed bosses, and the centralization of power nationally and also by the northern bosses (mainly those of the state of Sonora), primarily Obregón and Plutarco Elías Calles. Obregón managed to serve his four-year term to completion in which he began to implement some of the revolution's promises regarding land, labor, and the church. By 1929, the party of the revolution, the National Revolutionary Party (*Partido Nacional Revolucionario* or PNR), was founded after the country was pacified with the triumph of the “revolutionary” troops of the government over the “Cristerao” guerrillas.

THE INSTITUTIONALIZATION OF THE REVOLUTION, THE FIRST CYCLE OF PROFESSIONALIZATION, AND THE PROCESS OF DEMILITARIZATION

Taking James Wilkie's division of periods as a reference point, the Mexican Revolutionary State went through six periods in the 20th century: (1) political revolution (1910 to 1930), (2) social revolution (1930 to 1940), (3) economic revolution (1940 to 1960), (4) balanced revolution (1960 to 1970), (5) state revolution (1970 to 1982), and (6) restructured revolution (1982 to 2000).³⁰ During these six periods, the armed forces were the principal protagonists of the first two. They set the example for the transfer of political power to the new civilian revolutionary elite starting in 1946, due to a process in which the armed forces undertook an ambitious program of professionalization after their participation in World War II.

In the 1930s, to consolidate the “social revolution,” the government – its first iteration was the PRN, then the PRM (*Partido de la Revolución Mexicana*), and finally the PRI (*Partido Revolucionario Institucional*) – redirected federal funds and transferred other budget items to the armed forces associated with the regime’s social policy, such as education and health. After that, to achieve the “economic revolution” between 1940 and 1960, funds were focused on economic infrastructure. This process resulted in a successful demilitarization of public spending. Bear in mind that these are percentages of total government spending and are not the nation’s GDP.³¹

Between 1930 and 1945, three major events decisively marked the professionalization of the armed forces and the institutionalization of civilian-military relations in Mexico: (1) the founding of institutions to professionalize the armed forces, primarily based on the creation of the military education system, (2) the revolutionary general Lázaro Cárdenas’ government’s nationalization of oil in 1938, which forged one of the central elements of the cohesiveness of the armed forces, that of “nationalism,” and (3) the outbreak of World War II and Mexico’s support of the allied effort. Among the other actions that Cardenas implemented was the formal incorporation of the armed forces as one of the pillars of the PRI, along with the “popular sector,” labor unions, and the *campesinos* (peasant class). This explicit move to integrate the armed forces as an element of a political party demonstrates the intent to ensure the military was not apolitical – a goal in most democratic governments – but instead was a defined component of the political regime.

It was not until after the dust related to *La Revolución* had settled in the 1930s that the armed forces’ professionalization began in earnest. Previously, there simply was insufficient institutionality given the absence of political stability. The bases of professionalization began at the *Escuela Superior de Guerra* or ESG, with the *Licenciado en Administración Militar* (Bachelor of Science in Military Administration).³² The *Escuela Superior de Guerra* (the Superior War College) was roughly equivalent to the U.S. Army’s Command and General Staff College.³³ With this, the composition of

the revolutionary army began to change to a professional one.

The ESG also issued two professional military degrees: The *Diplomado de Estado Mayor* (D.E.M., in essence, “Staff College Graduate”), and *Diplomado de Estado Mayor Aéreo* (D.E.M.A., in essence, “Staff College Graduate – Air”). This distinction is much more important in the Mexican than in the U.S. case. Those who attend the ESG undertake a multiple-hour exam; only a limited number are selected. Historically, the number who begin the three-year program – full-time – has varied, usually less than 100, but at times more than 200. The graduation rate tends to be relatively low, with an attrition rate of 50 percent not uncommon. Those D.E.M. officers are the only ones (with rare exceptions) who will serve as staff officers in zone, region, and *Defensa* Headquarters assignments, as well as a command at the battalion/regiment level and above. Only D.E.M. officers will be promoted to general officers (with even fewer exceptions). Graduating from the ESG is a rite of passage that promises the only real path toward a successful career in the Mexican Army and Air Force.

In the 1930s, despite being founded in 1823, the *Heróico Colegio Militar* produced only high school graduates; the school was not accredited for undergraduate degrees until 2007. Also, under the control of the Defense Secretariat, in 1959, the *Colegio del Aire* (College of the Air, roughly equivalent to the U.S. Air Force Academy) was established, providing basic military aviation and officer training. Professionalization through military education is a gradual process, which finally began to bear fruit in the last 20 years of the 20th century with the creation of a number of schools specializing in technical fields in all the services, such as medicine, signals and communications, engineering, and dentistry.

Over the years, the PRI gradually lost popular support among a growing electoral base. From a 90.4 percent majority in 1958 to 79.8 percent in 1970 to 50.7 percent in 1988, and in 2000, the PRI candidate lost to Vicente Fox of the *Partido de Acción Nacional* (or National Action Party or PAN, which was more centrist than the left-leaning PRI). Notably, the military respected the decision, despite its

history of being closely aligned with the PRI, thus demonstrating the growth in professionalism in the military's culture over the previous 60 years. The military's gradual distancing from a given political party has led to a situation in which, despite alternating political parties in power – from the PRI to the PAN in 2000, from the PAN to the PRI in 2012, and from the PRI to Morena in 2018 – the military has adopted a relatively apolitical stance.

WORLD WAR II AND THE ACKNOWLEDGMENT OF THE REVOLUTION REGIME

Mexico's participation in World War II was relevant for various reasons. Although the limited presence of Mexican troops (the 201st Fighter Squadron of P-47s deployed to the Philippines) was considered militarily symbolic, Mexico played an important supporting role due to its location. Collaboration with the United States was essential for protecting the waters of the Caribbean, where two factors were crucial throughout the war: Safeguarding both the Panama Canal and the convoys of oil tankers. Germany waged a significant submarine war in the Caribbean, attempting to cut off the allies' supply of oil. Mexico supported the cause of the allies openly after German submarines sank its oil tanker "*Potrero del Llano*" on May 14, 1942, and nine additional tankers later that year.³⁴ Mexico declared war against Germany, Italy, and Japan on May 22, 1942.

An interesting aspect of this period included the leadership of generals Lázaro Cárdenas, who served as president from 1934 to 1940, and Manuel Ávila Camacho; both made efforts seeking a closer relationship with the United States. This is particularly noteworthy because Cárdenas had taken steps to nationalize Mexican oil fields in 1934, which generated a huge outcry from U.S. oil companies. As noted in the previous paragraph, Mexico perceived the primary threat as being from the sea. Presciently, Cárdenas took steps in 1939 to strengthen the navy and formally separated *Marina* from SEDENA that same year, establishing the *Departamento de la Marina*. A year later, the government elevated *Marina* to the same cabinet rank status as SEDENA. In this fashion, *Marina* developed doctrine independently from SEDENA for the first time since the 1820s. The Mexican Air Force was not given its independence.

It was and remains subordinate to SEDENA. For all intents and purposes, it is the aviation branch of the army.

Mexico's collaboration brought about the following results: The acceptance of military aid from the United States in 1940 and the subsequent creation of a Binational Defense Council,³⁵ authorization for the free movement of U.S. aircraft and ships and permission to use ports and airports if necessary,³⁶ permission for the United States to build an airbase in the southern state of Chiapas, the installation of a radar system (mainly on the west coast to protect Baja California and California against a potential Japanese attack), and the deployment of the Mexican Expeditionary Force to the Philippines in 1945, known as Air Squadron 201.³⁷

Mexico's support for the United States and the allies during World War II helped normalize Mexico's diplomatic relations abroad, achieve full recognition for the Mexican revolutionary regime, and, legally, overcome the pending litigation with the companies expropriated in 1938. When General Ávila Camacho's interior minister Alemán was nominated as a candidate for the presidency by the PRI in 1946, he had extensive foreign support, the trust of the military elite, and the backing of the business sectors due to the economic prosperity Mexico had experienced during World War II. A new period of professionalization opened for the armed forces through the gradual turnover of political power to the civilian revolutionary sectors and the establishment of an "unwritten civilian-military agreement" that would give autonomy to the armed forces in exchange for its full backing of the civilian government. Thus, Mexico's political stability was consolidated. In this fashion, Mexico's participation in World War II was a critical factor in a gradual change from the classic "anti-gringo" nationalism into a more pragmatic acceptance by the Mexican military of its northern neighbor.

THE CIVILIAN-MILITARY PACT AND FUNCTIONAL AUTONOMY

The culture of Mexican military troops is based on six components: Revolutionary tradition, loyalty, discipline, patriotism, nationalism, and apoliticism.³⁸

It is important to note two elements that emerged during World War II: Nationalism is not necessarily absolute “anti-Americanism,” and apoliticism does not mean the abandonment of political office by the armed forces but a redefinition of the decision-making process. The president has been a civilian since 1946 and is vested with nearly absolute powers with the armed forces under his command (principles of loyalty and discipline). In this manner, the military becomes one of the fundamental pillars of support in the exercise of political power and support of the PRI since, in this new state, there was no separation between the president, the bureaucratic apparatus, and the party. Due to this reality, many military men who were retired or on temporary leave were responsible for significant parts of public security and, on many occasions, served as state governors, suggested by the president to be subsequently recommended by the PRI to participate in upcoming elections. They also participated extensively as legislators.³⁹ In summary, an important first step was the move from military to civilian leadership in 1946 (with the “election” of Alemán), and then from PRI-dominated governments led by civilians to a legitimately elected leadership in 2000 (with the election of Fox).

Given the previous context, we observe a critically important element in the status of the Mexican armed forces: The existence of an unwritten civilian-military pact that has existed since the 1940s. This pact is based on the following simple rules: The first civilian president of the revolution, Alemán, accepted the mantle of command bequeathed to him by the generals of the revolution in 1946 in exchange for his absolute respect for the military and its legal, judicial, and budgetary autonomy. Accordingly, there is a second derived unwritten rule: The military would fully respect civilian power and defend it against any threat. The central element for this pact to work would be presidential control of the legislative branch (until 1997, the PRI was always able to control both chambers of congress with an absolute majority) and the judiciary branch so civilian government actions would never affect the armed forces in a detrimental manner.

In practice, the armed forces would independently write its internal legislation, the president would channel it to the legislature, and it would pass without any obstacle; in this way, “military autonomy” and a “code” were consolidated.⁴⁰ In both chambers of the legislature, the defense-related committees included retirees and military men (general and flag officers on active duty but seconded to congress). They were the mediators between the executive branch (president, secretary of treasury and public credit for budget matters, and the two military ministries) and the legislators. The possibility that the armed forces could legally be overseen by congress was never written or debated. This, of course, is dramatically different from the U.S. Constitution, in which Article I, Section 8 gives the legislature the power to “raise and support armies,” to “provide and maintain a navy,” and to “make rules for the government and regulation of the land and naval forces.”

The respect between the two factions of this pact was achieved because the PRI was beginning to mature and had developed quite efficiently. The institution that was the PNR, established in 1929, was the offspring of the revolutionary army.⁴¹ The armed forces intervened directly in times of higher need when the corporate and co-optation apparatus (through insertion in the “system” or using corruption) could not control political or social conflicts and had to resort to military repression. In other words, the use of the armed forces, primarily the army, in acts of repressive control became the exception but was efficient when used. The army would only intervene temporarily to “normalize” the situation and rapidly withdraw to its quarters, always acting at the president’s request and order, so the pact was never broken or altered with military action.

THE ESSENTIAL ROLE OF MILITARY EDUCATION AND TRAINING

To evolve away from what were, in essence, irregular peasant-based armies of the revolutionary era, consolidate the troops under a coherent chain of command, and begin to professionalize the force, it was clear that the existing training institutions required improvement and expansion.⁴² In this fashion, we observe the growth of identifiable military cultures in both the army and navy, within which are

embedded the values of loyalty, and in turn, the reduced likelihood of coups d'état. Senior military leadership gradually built a cultural and ideological image of the military not as simply a job opportunity but a lifelong career. Two key steps along this path were the creation of the army's *Escuela Superior de Guerra* in 1932, and the navy's *Centro de Estudios Superiores Navales* (similar to the U.S. Navy War College with both intermediate- and senior-level schooling) in 1971. SEMAR also established the *Unidad de Historia y Cultura Naval* (Naval History and Culture Unit) in 1984 to further develop and inculcate naval culture. During the Cold War, Mexican military officers placed great emphasis on lessons explicitly against coups, continuing to emphasize loyalty and subordination to civilian authority as paramount.⁴³ The military education system evolved to professionalize the officer corps and staff them with the civilian political actors who control the governmental bureaucracy run by the PRI. In this way, the army and the PRI were tightly linked. Both factions were aligned by the same values, ideology, and military culture: Loyalty and nationalism. The two institutions existed to defend the regime and the "civilians" of the PRI, and the "military" of the PRI interacted to protect the revolutionary government.⁴⁴ When the civilian efforts to impose order proved insufficient, the military arm would do the dirty work of intervening in agrarian conflicts with *campesinos*, break up worker strikes, intimidate labor unions, fight against leftist and insurgent groups, and so forth.⁴⁵ There is an important case study of this in the PRI's response to the 1968 student protests, which is covered later in this paper.

The creation of a higher military education system for naval and army officers – the rank of rear admirals and captains in the navy; brigadier generals and colonels for the army – began in the early 1970s. The *Centro de Estudios Superiores Navales* (Center for Superior Naval Studies or CESNAV) was founded in 1971, mainly to train naval officers. SEMAR also established the *Unidad de Historia y Cultura Naval* (Naval History and Culture Unit) in 1984 to further develop and instill naval culture.

In the army and air force, the *Colegio de Defensa Nacional* (National Defense College or CDN, roughly equivalent to the U.S. Army War College) was founded in 1981.

The CDN offers a Master of Arts in Military Administration for National Security and Defense. In addition to its limited faculty, civilian academics from public and private universities are invited to teach classes. Although most students are active-duty colonels and brigadier generals, a handful of civilians from government agencies, mainly foreign policy, treasury and public credit, and Mexican Petroleum (PEMEX) attend the year-long program. Military-civilian relations are also being strengthened by allowing soldiers to attend outside educational institutions. Both SEDENA and *Marina* authorize limited numbers of officers to undertake undergraduate, graduate, and doctoral courses in public and private civilian institutions. In general, the students receive financial support. Another channel is the study abroad program, which mostly consists of exchange programs with other countries' military institutions. Officers attend U.S. educational programs and also courses in Argentina, Belgium, Brazil, Canada, Chile, England, France, Germany, Guatemala, Italy, Israel, and Spain.

THE CIVILIAN-MILITARY CLASH OF 1968, ARMED MOVEMENTS, AND COUNTERINSURGENCY

The two most controversial acts of the armed forces in the second half of the 20th century were its participation in suppressing the student movement of 1968 and the counterinsurgency war of the 1970s. The latter mainly consisted of rural guerrilla forces, especially those in Guerrero's southern state, primarily the Poor People's Party (*Partido de Los Pobres* or PDLP).⁴⁶ This insurgency group, which sought to instill socialism, first arose in Chihuahua in 1964, and its first armed guerrilla attack was against a police station in May 1965. On September 23 of that year, an army headquarters in Ciudad Madera, Chihuahua, was attacked with a negative outcome for the guerrillas. The National Revolutionary Civic Association subsequently surfaced in Guerrero in the late 1960s, and the PDLP incorporated Lucio Cabañas.⁴⁷

In a separate series of actions, a student protest movement evolved in the late 1960s. The official explanation was provided by General Luis Garfinas Magaña:

In that year (1968) student riots occurred that threatened to create

chaos and anarchy, principally in this capital, and that is why the armed forces had to act in order to keep the violence being unleashed by irresponsible elements from preventing Mexican citizens from living in peace.⁴⁸

For his part, President Gustavo Díaz Ordaz justified the army's action in his 1969 report to the nation, stating:

The Mexican Army has the serious responsibility of maintaining internal peace and order under the Constitution in order for our institutions to function, for Mexican citizens to enjoy the liberty the law guarantees them, and for the country to continue its progress. The way it discharged its duty is clear proof that we can trust in its patriotism and its civic and institutional conviction: to restore order and immediately return to its normal activities.⁴⁹

Díaz Ordaz took full responsibility for the repression, "cleaning up" the image of the army and fostering the presidential succession.⁵⁰ The repression of the student movement, primarily the October 2 event in Tlatelolco, was one of the most significant military operations in the history of the Mexican Army. According to calculations, between 5,000 and 15,000 troops participated. The number of dead and prisoners was never accurately determined. Several sources agree on a range between 200 and 300 dead.⁵¹

It is difficult to overstate the impact this atrocity had on the Mexican Army, both immediately and over the years, leaving aside the effects on the political system and society writ large.⁵² At the tactical level, declassified reports from a variety of sources, including the U.S. Central Intelligence Agency, the U.S. Defense Intelligence Agency, the U.S. Federal Bureau of Investigation (FBI), and the U.S. Department of State, paint a picture of a less-than-fully trained and capable force. They also suggest interagency confusion and poor-to-nonexistent communication and coordination

between the military and federal police forces. At more senior levels, those same reports indicate the Mexican Secretary of Defense, Marcelino García Barragán, was upset with tactical commanders for being inside the plaza and participating in the event. This suggests García Barragán did not have the level of control one would have assumed. Other reports suggest that the snipers who initiated the firefight – there is video evidence that the first muzzle flashes came from apartment buildings rather than the crowd of students – were fired by members of a different army unit (allegedly from the Presidential Guard Corps, Mexico’s militarized version of the U.S. Secret Service, independent of the Defense Secretary) with the intent of causing the troops in the plaza to return fire.⁵³

The events of 1968 were decisive for the country’s political history and the army. This was the biggest “anti-system” movement that profoundly questioned the leadership of the PRI.⁵⁴ The event also served as a catalyst for guerrilla forces, at the time isolated in rural regions, to grow and incorporate young people from the universities in urban centers. Between 1968 and 1976, several urban action guerrilla groups appeared (mainly composed of students) like the already existing rural guerrilla forces. Some of them found rural tradition in states like Guerrero and became part of the marginalization and violence caused by power structures controlled by groups of violent local bosses, with the police and the army often adding to the situation, resulting in armed movements as a form of peasant self-defense.⁵⁵ Others were urban guerrillas acting as clandestine groups without popular support.

The Mexico case was similar to counterinsurgency efforts undertaken by many military regimes throughout Latin America during this period. In the 1960s, military regimes came to power in most countries in Latin America and extended into the 1970s with the Chilean coup ousting Salvador Allende on September 11, 1973, and the Uruguayan dictatorship in June of that same year. Every Latin American country experienced a military government in the 20th century. Only four countries were not under military rule in the 1960s through the 1980s, and two of the four – Mexico and Cuba – were ruled by authoritarian regimes. In the Mexican case, however,

there was no coup, nor was the political order first established in the 1920s altered in any significant sense. Therefore, we can observe the development of a strong collective military culture on two fundamental pillars: Strict and absolute loyalty to the president, and the principle of non-intervention as the key external element. This foundation established in the 1920s continued through the 1930s, WWII, and through the years of unrest in the 1960s and 1970s.

THE CHIAPAS CRISIS AND THE ARMED FORCES

The next major challenge would present itself during the *Ejército Zapatista de Liberación Nacional* (Zapatista Liberation Army or EZLN) uprising of January 1, 1994. Early that morning, a relatively unknown group operating almost totally in secret attacked and took San Cristobal de las Casas and six villages in the southern state of Chiapas.⁵⁶ In the first phase of the conflict, which lasted until January 12, the Zapatistas engaged in firefights with the army, killed police officers, ransacked stores, burned government buildings, kidnapped a former governor, let prisoners out of jail, and robbed explosives. It also claimed responsibility for a car bombing in Mexico City and toppled electricity pylons in Puebla and Michoacán. The EZLN is a product of old *Ejército de Liberación Nacional* (ELN) guerrilla forces.⁵⁷ As such, according to its spokesperson, it had been in existence for 10 years as of November 17, 1993, so its actions had been carried out in total silence (or, what in guerrilla language means the “political and military forces accumulation” phase).⁵⁸ This constituted the first time in Mexico’s modern history that a guerrilla force had been able to generate sympathy and authentic political leadership in significant sectors of the population, and its sympathizers and militants were estimated at more than 2,000, with an area of political influence in excess of 200,000 indigenous inhabitants. The Mexican Army itself estimated the EZLN combatants at 5,000 at the start of the conflict.⁵⁹

With the appearance of the EZLN, the Mexican Army was caught flatfooted, embarrassed, and surprised badly, with no intelligence indicating a pending attack. The army reviewed its counterinsurgency tactics, preparing for a significant counterattack against the EZLN positions. However, the entry into effect of the North

American Free Trade Agreement (NAFTA) that very day brought about a qualitative change in the PRI's response to insurgent movements. The army could not engage the EZLN as it had with the PDLP or ELN in the 1970s due to two key factors: The pressure of the U.S. business community and a brand-new phenomenon known as the internet. President Carlos Salinas de Gortari (1988-1994), aware of the army's preparations to engage directly against the EZLN, asked Secretary of Defense Antonio Riviello Bazán if he would support a negotiated process rather than an armed assault. Riviello responded that the army would comply with whatever order the president were to give, reaffirming the key principle of loyalty and subordination to the president.

With the army's support secured, the Salinas administration adopted an indirect response seeking negotiation. The army's role shifted to a containment mission of the EZLN, staging a limited deployment of forces for deterrence.⁶⁰ The year 1994 registered an increase in troops and resources for the armed forces, which then returned to its average level observed between 1980 and 2000. The EZLN containment strategy remained one of dialogue and negotiation, although no cease-fire had been established.

Since 1994, the Chiapas crisis has been characterized by zigzagging tactics between the EZLN and the government, which included the suppression of military strategies as viable options for the two parties, and an unsuccessful search for political solutions. For the Mexican military, NAFTA exerted a significant influence on the decision not to employ the army to resolve the conflict but rather to seek a political solution. The EZLN was prevented from acting militarily because of the domestic and international projection of its message was based on the group being a "moral force," represented by natives fighting for a good, noble cause in the most underprivileged state in Mexico. Moreover, the EZLN deployed an "invisible army of militants" or international "network warriors" on the internet. This new capability gave it a political force in the face of the precariousness of its military capacity.⁶¹ Faced with this new type of proficiency, the Mexican Army could do absolutely nothing because it had not yet developed cyber assets. Additionally, for the first time since the mid-1970s,

the armed forces were accused of committing human rights violations against the civilian population.⁶² This affair ultimately had a significant impact on the cultural codes for the employment of the armed forces.

As the PRI-dominated era was running out of steam, an alliance of 14 tiny armed groups formed the People's Revolutionary Army (*Ejército Popular Revolucionario* or EPR) in the State of Guerrero in June 1996.⁶³ The EPR acted in one of Mexico's most violent regions, where the local bosses, integrated through "families," controlled the economic, social, and political structures.⁶⁴ The main areas of action of the EPR were the States of Guerrero and Oaxaca.⁶⁵ The government's strategy against them repeated the actions undertaken against the guerrillas of the 1970s: Rural counterinsurgency, with the army taking the initiative and security forces detecting the urban nuclei. No dialogue or negotiation with the EPR was conducted.

THE MISSIONS OF THE ARMED FORCES

At the operational level, the Mexican Armed Forces are trained and equipped for three primary missions established by constitutional mandate.⁶⁶ Plan DN-I (*Plan Nacional de Defensa-I*), protects the nation, territory, and population against outside enemies, and Plan DN-II, focuses on social peace and internal security. Since 1966, a newer defense plan known as DN-III-E has been added to protect the population from natural disasters.⁶⁷ In the case of DN-I, the only time Mexican armed forces conducted this mission was when elements of the Mexican Air Force deployed to the Philippines in 1945 to support the United States in WWII's Pacific campaign. In keeping with traditional Mexican foreign policy, Mexico has not engaged in any external combat missions. That said, Mexico has deployed assets in humanitarian relief missions, and the government sent 120 police officers to El Salvador in the early 1990s to assist in the implementation of negotiated cease-fire agreements. To date, the armed forces have not participated in any United Nations (UN) peacekeeping missions other than as observers.

Due to Mexico's geopolitical environment, in which it has no outside enemies

and has definitively established its national borders through agreements with its three neighbor countries, the danger of an external war of defense is increasingly remote. For that reason, the part of Plan DN-I against a foreign aggressor has changed qualitatively. During the Cold War, the “communist threat” was part of a hypothetical threat to Mexico that never materialized. By the end of the 1970s, an external war was again possible with the expansion of the crisis in Central America, tensions within and between neighboring countries (Guatemala, Honduras, and Cuba), and the existence of substantial energy resources near the southern border and the Caribbean. However, those threats were diffused by the processes of peace and demilitarization in Central America, the Cuban economic crisis, and the normalization and intensification of relations with Guatemala and Belize.

Plan DN-II is considered the core activity of the Mexican armed forces. Due to Mexican history, a major part of the resources and conflict scenarios are centered on internal threats. These consist of various types, from the existence of armed groups that defy the power of the state (Lucio Cabañas in the 1960s or the Zapatistas in the 1990s) to contemporary instances of drug trafficking and transnational criminal organizations. Other examples arise sporadically, most of them due to the inadequacies of other state and government institutions in Mexico, particularly public security in the rural setting.

During the 1990s, the Salinas and Ernesto Zedillo administrations (with the PRI still in charge, but with its absolute power diminishing) tasked the armed forces with fighting drug trafficking (the continuation of the *Campaña Permanente*, established in 1975 and intended to address the cultivation, processing, and trafficking of illicit drugs), crime, and counterinsurgency (the Zapatista movement). Accordingly, a significant portion of the armed forces’ resources, from the deployment of troops to intelligence operations (aimed at analyzing and recognizing the magnitude of the “enemy”), was dedicated to this purpose. In addition, the armed forces also routinely conduct many missions that could be considered outside the core functions of a military. The “developmental” tasks have a social “doctrine,” a product of their

origin of the armed forces in the revolution and their political role of building the state between 1920 and 1940, a tradition that remains important, even today. During the “economic revolution” (1940 to 1960) and “balanced revolution” (1960 to 1970), the armed forces gradually changed its relationship with the state to support development strategies, backing the processes of community integration in rural areas, communications, and strengthening “civic action” in marginal areas (to include planting trees and teaching in schools).

The primary difference between SEDENA and SEMAR in terms of mission sets is that the army is fundamentally internally oriented, whereas the navy has an external focus. This is largely due to their roles, but those tendencies are also reinforced through training and education. When the army has training opportunities, it deploys at the small unit level throughout the country. For its part, when the navy trains, it goes offshore. The best example of this is the tall ship *Cuauhtémoc*, purchased from Spain in 1982. Most cadets (those of the line and combat support functions) spend their final year at the *Heróico Escuela Naval* on board the *Cuauhtémoc* visiting foreign ports around the world, imbuing them with a “global culture” of sorts as part of their formation process.

Given the previously described requirements, the organization and deployment of the army evolved to support Plan DN-II, and to a lesser extent, DN-III-E. Even the army’s organizational evolution in the 1990s, with the creation of the Special Forces Airmobile Groups (*Grupos Aeromóviles de Fuerzas Especiales* or GAFEs), was mainly in response to the challenges of DN-II. The first GAFE was created in 1990,⁶⁸ and the First Army Corp’s Special Forces Company was formed in 1994. The intent was to have a GAFE assigned to each military region’s headquarters and later at the military zone level. The United States provided support for the training and equipping of the GAFEs in the late 1990s.⁶⁹ The concept of “Special Forces” has been introduced in all three branches — the army, air force, and navy. In the case of the army, the GAFEs evolved into the *Cuerpo de Fuerzas Especiales* (Special Forces Corps) in 2004.

In terms of providing support to the civilian population, the Mexican armed forces have been charged with “Social Support” or “Civic Action” missions, which means activities superimposed on other federal agencies’ missions and state and municipal constitutional duties. These are broadly included in the DN-II and DN-III-E plans. A list of civic action missions conducted by the armed forces in the 1970s included:⁷⁰

- repairing roads and schools;
- literacy;
- campaigns against plagues and epidemics;
- surveillance of rural crime;
- support for census-taking in rural areas;
- surveillance of major roads;
- medical, veterinary, and dental social-action brigades;
- distributing potable water in dry areas (Aquarius Plan, which started in President Echeverria’s six-year term); and
- reforestation and environmental protection on- and offshore.

Many of these duties are carried out in a combination of regular detachments of the armed forces, primarily the army, and through rural defense. These activities are constitutionally and legally the responsibility of other federal or even state or municipal agencies.⁷¹

Six years later, a balance sheet of armed forces activity for 1976-1982 indicates that the army and air force were involved in:

- protecting vital facilities;
- fighting drug trafficking;
- implementing Plan DN-III-E;
- enforcing the Federal Firearms and Explosives Law;
- supporting national census-taking;
- supporting the electoral districting survey;
- supporting electoral meetings;
- reforestation;
- distributing potable water (Aquarius Plan);
- fighting epidemics and epizootics;

- supporting PEMEX;
- protecting the *Comisión Federal de Electricidad* (State Power Company);
- assets security;
- protecting archaeological items;
- distributing textbooks;
- radioactive materials safety; and
- support for civil aviation.⁷²

It also has a long list of participation in all types of interdepartmental commissions, from support for the Department of Tourism to the Mexican-American Commission for the Eradication of the Bore Worm and participation in the Campaign Against the Mediterranean Fly. The armed forces have stopped performing some of these missions, especially the political-electoral type missions, due to the controversy about indirect support for the PRI, but most of them continue.

One of the new facets of Plan DN-III-E is that its implementation has led to sending troops out of the country. This has antecedents in the 1970s when the government authorized the deployment of the navy due to the 1982 earthquake in Managua, Nicaragua and El Salvador because of the destruction caused by the 1985 earthquake in Mexico City. However, in October 1998, the deployment to help with rescue work after Hurricane Mitch in Central America was extensive and significant because it included aid to four countries, organizing an air and naval bridge with Guatemala, El Salvador, Honduras, and Nicaragua. The president ordered deployment on November 3. In addition, Plan DN-III-E was deployed in Bolivia in May 1998 to help earthquake victims and in Colombia in January 1999. In December 1999, a large military contingent was mobilized due to the severe flooding on the Venezuelan coast. In 2004, in the wake of the Indian Ocean earthquake and tsunami, the navy deployed a hospital ship and support vessels and helicopters to assist.

THE CONTROVERSIAL MISSIONS: THE FIGHT AGAINST DRUG TRAFFICKING, ORGANIZED CRIME, AND THE PARTICIPATION OF THE ARMED FORCES IN PUBLIC SECURITY

The regular participation of the armed forces in the war against drugs began in the late 1940s. During World War II, the United States helped transition part of the agriculture of the states of northern Mexico to produce opium to help provide relief for the soldiers wounded on the battlefield. Due to their high yield, these crops were produced by “agro-businessmen” and some military men. Basically, drug cultivation was promoted in Sinaloa, Chihuahua, and Durango. In the case of marijuana, Mexico was an average supplier and was replaced by better-quality product from Jamaica, Colombia, and the development of local production in the United States. For that reason, drug trafficking as a matter of conflict between Mexico and the United States began in the 1980s with the growth of cocaine production and trafficking from South America to the United States.

The change in narcotics trafficking to cocaine in the 1980s was complicated because of increased profit margins for a product that was lighter and easier to transport. Those profit margins generated additional opportunities for corruption,⁷³ exacerbating a systemic element in the Mexican political system by establishing a nexus between crime and policy that has proven difficult to eradicate. A former FBI agent who worked in Mexico for a long time maintains:

The political authorities offer immunity to criminal elements and in exchange they obtain money for development, party campaign investments and funds, and personal enrichment. The criminals are expected to pay and to obey the authorities, and when they become a risk and do not produce, they are jailed or destroyed.⁷⁴

This yields a pessimistic diagnosis of drug trafficking as the major activity of organized crime in Mexico. Since the 1980s, the growth of drug trafficking has been one of the primary points of tension between the U.S. and Mexican governments. This

friction was aggravated after the murder of U.S. Drug Enforcement Administration (DEA) agent Enrique Camarena in Guadalajara in 1985.⁷⁵ From then on, the problem was viewed as a matter of national security in Mexico.⁷⁶ The government first described it as such starting in 1987.⁷⁷

The Salinas administration (1988-1994) reformulated the institutional and coordination strategies for the war against drugs, and unprecedented cooperation with the United States began. In the words of one of its principal authors, Mexico's strategy is not elimination but containment. "The goal of this war is not to destroy the enemy, because that is impossible. We are trying to keep it under control," acknowledging the vulnerability of the Mexican government forces.⁷⁸ Since 1990, the media has covered the collaboration between governments and armies. In June of that year, it was reported that a tactical unit of the U.S. Army had detected aircraft in Mexican airspace.⁷⁹ On Salinas' second visit to the United States in June 1990, the two countries reached agreements for the presence of DEA agents in Mexico. In November of that year, a framework of action was established for U.S. aircraft and satellite sweeps in the war against drugs. Throughout most of Salinas' term, the bulk of the counter-narcotics effort was conducted by law enforcement agencies, with the military dedicated primarily to eradicating marijuana and opium poppy (as opposed to interdicting cocaine trafficking).

During the Zedillo administration, the strategy of the war on drugs was based on the formulation of the "1995-2000 National Drug Control Program," strengthening cooperative relations with the United States starting with the establishment of the "U.S.-Mexico High Level Contact Group for the War Against Drugs" (GCAN) in March 1996.⁸⁰ This cooperation strengthened a year later after President Bill Clinton visited Mexico in May 1997 with the two presidents signing the "Declaration of the Mexico-U.S. Alliance Against Drugs." The declaration noted shared responsibility in the fight through integral focus and the establishment of extradition accords and greater intelligence cooperation.⁸¹

During the Zedillo administration, the military was more involved, with most actions carried out by the armed forces. Even equipment belonging to the Attorney General of Mexico (*Procuraduría General de la República* or PGR) was transferred to the army to lead the war, such as the delivery of 18 Bell 206 helicopters to the SEDENA. In addition, besides the 73 UH-1H helicopters transferred by the United States, the army acquired 16 MI-8 and MI-17 helicopters made in Russia in 1997.⁸²

The year 1997 signaled the largest shake-up in the war on drugs in Mexico. On February 23, it was discovered that Gen. Jesus Gutierrez Rebollo, National Institute to Combat Drugs commissioner and commander of the Fifth Military Region (headquartered in Guadalajara), was acting in support of the Juárez Cartel, headed by Amado Carrillo. The myth of the incorruptibility of the armed forces dissolved, and a conflict broke out with the United States to the point that in April 1997, the U.S. Department of State declared Mexico “uncertified” in its annual certification. This myth was even believed by the secretary of defense: “The risk of contamination in the army has always existed. The novelty could be the will to fight those involved in it, regardless of their prestige, rank, or position.”⁸³ The binational report on the war against drugs issued by GCAN noted the need for the attorney general’s office to dismiss 1,200 police agents in 1996. The report stated that corruption had extended to the systems dispensing and ensuring justice.⁸⁴

With the growing emphasis by both SEDENA and SEMAR to support public security and counter-narcotics trafficking, there was a shift away from traditional military roles to non-military police functions. This came about because of Mexican political authorities making decisions regarding existing national security plans, as well as cooperation agreements with the United States.

In broad terms, the armed forces’ missions are focused on domestic duties. In the case of SEMAR, they are largely efforts for coastal protection, such as a coast guard mission. Despite this, there is an ongoing effort in SEMAR to develop its doctrine and culture “toward the sea,” meaning a greater opening to things “international.”

SEMAR considers the task of recognizing Mexico's area of geographic influence as an opportunity to better develop as a military force, (as opposed to traditional coast guard duties).⁸⁵ The service indicated that the new international system that has arisen because of globalization requires the building of "defensive potentiality and a deterrent capability with which to confront new global threats."⁸⁶ For example, since 2018, SEMAR changed the phrase associated with the service's origins. The previous slogan of "on land, and air, and sea" is now "on the sea, air, and land," as an effort to emphasize that naval doctrine must have an external view.⁸⁷

Most recently, during the Andrés Manuel López Obrador administration, the more than 80,000 troops assigned to "Internal Peacekeeping Operations" were dedicated to confronting organized criminal activity and providing direct support to public security.⁸⁸ This significant deployment of both active-duty forces and the National Guard was due to the failure of successive administrations to strengthen federal law enforcement. The second priority is the national defense plan III (DN-III-E), which projects the armed forces in the best light, saving property and lives during natural disasters.

Another example of Mexico's contrast to many of its regional neighbors is in international peacekeeping operations. In what seemed like an obvious opportunity, Mexico did not collaborate with the UN in Haiti's peacekeeping mission in 2004 in the aftermath of its devastating earthquake, even though Haiti is in Mexico's immediate geopolitical area of influence. This debate has been intense over the years, with Secretary of Foreign Affairs Marcelo Ebrard (appointed on December 1, 2018) expressing the need for Mexico to participate actively in UN peacekeeping operations.⁸⁹ Public opinion appears to support that exchange with other armies in the world.⁹⁰ In 2014, President Enrique Peña Nieto affirmed at the UN General Assembly that Mexico would send peacekeepers on international missions. For its part, SEMAR has been more supportive of this option, with SEDENA being more cautious. López Obrador inaugurated the Joint Training Center for Peacekeeping Operations in Mexico in January 2020. The military argues that the main obstacle in participating

in international missions is that most of the troops are focused on domestic tasks at the operational force level. The 2020 COVID-19 pandemic added to the military's already full task list, with military personnel added to the anti-coronavirus effort.

THE BILATERAL MILITARY-TO-MILITARY RELATIONSHIP WITH THE UNITED STATES

As detailed previously, the World War II-era constituted the best time for military relations between the two countries. Although there were no times of military tension during the Cold War, Mexico did not share the U.S. views of hemisphere security, which were centered against communism, bringing bilateral cooperation to a lower-level. For example, between 1950 and 1968, the U.S. trained more than 46,000 Latin American soldiers, of which only 546 were Mexicans.⁹¹ The same trend was registered in the equipment donation and arms sales programs during that period.

Even though Mexico signed the Rio Treaty in 1947, its implementation was opposed when it was invoked because the Mexican government believed it violated the principles of non-intervention and self-determination. With respect to the Interamerican Defense Board, Mexico claimed it would always remain in its consulting capacity and opposed its expansion or its involvement in operational missions, a position entirely consistent with its traditional foreign policy. Despite the 1968 conflict and the appearance of guerrilla forces in the early 1970s, the United States did not press to expand cooperation since it thought the army and the civilian intelligence and security agencies could manage a threat with their own resources.

In the 1990s, post-Cold War, there was an unprecedented effort in the United States to strengthen military cooperation programs with Mexico because it was believed Mexico would need security augmentation with the imminent signing and entry into force of NAFTA.⁹² This resulted in increased "high-level" contacts between the armed forces of the two countries, which many analysts interpreted as a radical turn in military relations. The main events are as follows:

- In 1992, U.S. Joint Chiefs of Staff Chairman Gen. Colin Powell presided in

Washington at the 50th Anniversary of the Joint Mexico-United States Defense Commission. This Commission, established during the war, had never been dissolved but had remained “frozen” since the end of World War II. Mexico agreed to the celebration. The United States had thought it would be revitalized. However, the commission has never been used as an important venue.

- U.S. military vessels made more frequent calls at Mexican ports. For example, in 1991 there were only nine visits, while in 1992 there were 46. Joint activities also grew with the navies and U.S. Coast Guard, such as crew search and rescue and “hot” pursuit of suspected drug trafficking vessels, while informal contacts also expanded significantly.
- Border Commanders Conferences were established between the U.S. and Mexican Armies. The first conference took place in 1991 and continues to this day. These periodic events provide opportunities for the commander of the 5th U.S. Army (also known as Army North, the land component of U.S. Northern Command) to engage with SEDENA’s northern region commanders.
- The signature of unprecedented agreements in the war against drugs, in the military area when U.S. Defense Secretary William J. Perry visited Mexico in October 1995 and National Defense Secretary Gen. Enrique Cervantes visited Washington in April 1996. During his visit, Perry announced the conduct of combined naval maneuvers; however, these exercises did not occur due to active opposition by the Mexican public. During these visits, agreements were made to transfer the 73 UH-1H Huey helicopters that later would cause many problems. They all were returned in 1998.⁹³

This bilateral military rapprochement, which began the Perry initiative, resulted in Mexico’s transformation from receiving limited Department of Defense funding to being one of the countries in Latin America that received the most cooperation from the United States. Figure 1 shows a sharp spike, continued funding at lower levels, and a gradual decline during the Fox term after the September 11, 2001 attacks. That said, there was greater cooperation in the war against terrorism between the two countries. In March 2002, the Smart Border Agreement was signed. This agreement

initiated a broad program of increased cooperation that included more border control coordination, migration information, information sharing regarding commercial airline traffic, and notable agreements in intelligence sharing.⁹⁴

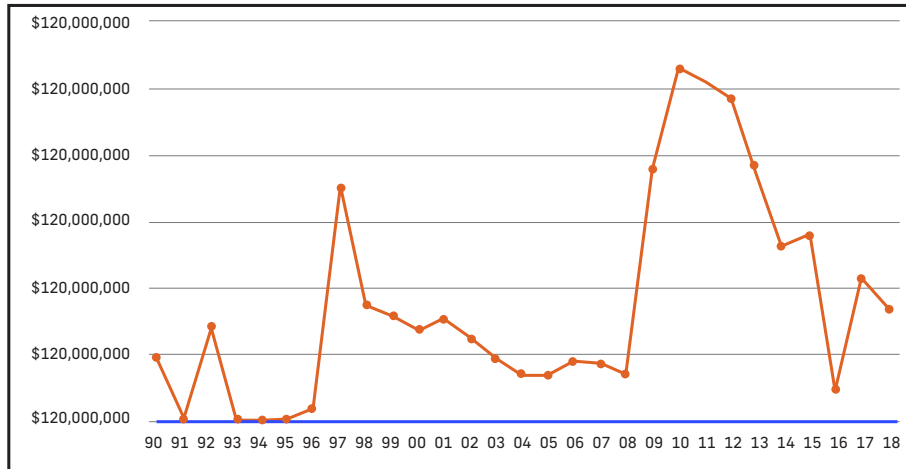


Figure 1. U.S. Department of Defense Spending in Mexico⁹⁵

A challenging element in improving bilateral military cooperation was U.S. congressional oversight. Beginning in the 1980s, congressional interest and unease with the executive branch’s lack of success combating narcotics trafficking led to the passing of the Drug Abuse Act of 1986. This legislation forced the executive to certify that countries receiving U.S. funding were “cooperating fully” with the United States in counter-narcotics operations. This requirement resulted in an annual dispute between the two branches – the executive wanted to continue funding, and the legislative questioned the “full cooperation” of the receiving country. Certification in the war against drugs was suspended in September 2002.⁹⁶

The administration of Felipe Calderón (2006-2012) would usher in the closest level of bilateral military engagement since World War II. A combination of factors, including insecurity in the region due to drug-related violence, President George W. Bush’s concern for the region, and Calderón’s commitment to addressing security in Mexico, would combine to produce what would become the Mérida Initiative. Calderón traveled to Washington on November 9, 2006, to meet with Bush at the White House. The focus was on security, and Bush committed to supporting Calderón.⁹⁷

After assuming the presidency on December 1, 2007, Calderón ordered the first large-scale operation of his term on December 11 with *Operación Conjunta Michoacán* (Joint Operation Michoacán). Approximately 7,000 members of the army, navy, and federal police forces inspected thousands of persons, vehicles, and ships and eradicated scores of marijuana fields. It was just the beginning of what would evolve into a broad, intensive, and controversial six-year effort, led principally by *Defensa* and *Marina*, to gain the upper hand in what Calderón perceived to be the weak and deteriorating condition of security throughout the country. Bush visited Calderón in Mérida on March 13-14, 2007, and agreed on greater cooperation:

The Presidents recognized the continued threat to both nations posed by organized crime and drug trafficking, especially their associated violence, which do not respect borders. They underlined that the important efforts of the Mexican Government to confront organized crime head-on, as one of the most important priorities of its own domestic agenda, would benefit from increased support from and cooperation with the United States. In this connection, they reiterated their commitment to intensify cooperation and information sharing between the law enforcement agencies of Mexico and the United States, especially along the border region.⁹⁸

Over the ensuing years 2008 to 2015, the level of U.S. Department of Defense support for Mexico spiked again and settled at higher levels than previously seen. This is noteworthy in that the support and cooperation levels managed to transcend changes in administrations on both sides of the border (from Bush to Obama and Calderón to Peña Nieto).

The Mérida Initiative was the most notable project to emerge from the improved bilateral security relationship. Separately, SEMAR entered the North American Maritime Security Initiative in 2008, which enhanced cooperation to combat narcotics trafficking and terrorism and provided funding for equipment and training.⁹⁹ Both SEMAR (in 2007) and SEDENA (in 2009) sent liaison officers to U.S. Northern Command, an important gesture of growing confidence. There were also representatives at the

Joint Interagency Task Force South, located at Naval Air Station Key West, Florida.¹⁰⁰

IMPLICATIONS FOR MEXICAN MILITARY CULTURE

Mexico's domestic and foreign history establishes the context in which the culture of the armed forces evolved. The most recent transformative watershed in that regard, *la Revolución*, solidified the importance of armed forces and their loyalty to a single source of authority. For that reason, the training and educational systems, formal and informal, have drilled into the individual and collective minds the importance of loyalty, discipline, and nationalism. An interesting variant on the loyalty factor can be observed regarding loyalty to whom or what. In the U.S. case, the answer is simple: Officers and soldiers swear an oath of loyalty to no individual, but to the constitution. The Mexican case is less absolute: There are oaths of allegiance to the flag, the republic, the constitution, and the president. Additionally, one observes the existence of fidelity to another entity not included above. A routine verbal engagement between superiors and subordinates is typically expressed in a "*sí, mi Jefe,*" or "*sí, mi General*" (yes, my boss, or yes, my general). These expressions are used extensively, without thought. But they express loyalty to an immediate superior and harken back to earlier days pre-dating constitutions or presidents.

During the revolutionary regime (February 1917 to December 2000), the armed forces never had autonomy with respect to the political system (as happened in most Latin American countries in the last half of the 20th century), so their action and deployment were not factors of instability. The military built a regime of functional and systemic autonomy but was subordinate to the president as supreme constitutional commander, applying the principles of loyalty and apoliticism. The armed forces could fall back due to the capability of the political system to solve the problems of governance without the direct use of force on most occasions and have a "residual" role, being used only exceptionally.¹⁰¹ Without ceasing to be a sort of "strong-arm" of the PRI until the mid-1990s,¹⁰² they were also one of the sources of political stability. Thus, during the Cold War, since the military was the "strong-arm" of the PRI, which was able to control the political opposition, no coup d'état occurred as seen in the

majority of Latin American countries.

In the 1990s, primarily during the term of Salinas, a qualitative “re-militarization” was observed. This was because high positions in public safety agencies were held by active-duty or retired officers from the army, air force, and navy, and a serious public safety crisis was brewing with drug trafficking and the outbreak of the Chiapas crisis. There is also information indicating that Salinas used the army several times in electoral processes to impose influence in favor of the PRI.¹⁰³

The correlation is clear: Periods when the country’s institutions were able to channel and resolve political conflicts by themselves without resorting to violence were times of rest and professionalization for the armed forces. When the PRI, the well-formed child of the revolution began to age, there was a tendency toward instability in various regions within the country, and the armed forces were used for containment (as they were in 1968 and against the guerrilla forces in the 1970s), deterrence, and support for other safety agencies (as they were during the 1990s).

The 20th century saw three cycles of armed forces modernization and professionalization. The first was in the 1930s, with the institutionalization of military education, centralized decision making, disarming the revolutionary militias, and establishing control of regional movements and bosses. This first cycle of professionalization did not separate the armed forces from the political system. The second cycle began in the 1940s, a product of World War II and how Mexico undertook its development strategy. There was a significant transformation in public policy in favor of allocating funds to infrastructure projects, qualitative and quantitative demilitarization, the 1946 civilian-military pact, and the first de-politicization (for the executive branch).

The 1960s witnessed the “civilianization” of the PRI when a retired general was no longer the chairman of the party in 1964. The third modernization and professionalization cycle occurred gradually between 1970 and 2000, in the “statist

revolution" (1970 to 1982) and "restructured revolution" (1982 to 2000) periods. With the defeat of the PRI in the 2000 presidential election, we observed a period of military adaptation to democratic norms. This implied the need to interact with a newly forming civil society paying more attention to a range of issues, including human rights, budgetary scrutiny, a gradual reduction of military autonomy, increased interaction with both the legislative and judicial authorities, and gradual acceptance of a growing military interdependence with the United States.

We also observed a process in which the old generals who were active during the revolution were transferred and retired, the military education system was qualitatively improved, equipment was modernized, and military relations between the United States and Mexico were restored. During this period, the armed forces went through their most important political "trial by fire" of the past 70 years: Accepting as a professional body that their thriving child, the PRI, had lost the presidential elections and lending vast stability to the political transition in the second half of the year 2000. At the same time, they reaffirmed their principle of apoliticism. Supporting Fox as he took office, they procured advantages in being able to "influence" that a possible reform of the state apparatus in national security and defense policy would not affect them as institutions.¹⁰⁴ "Younger" army officers continued to be promoted, replacing the "old guard" from the revolution and are open to new thinking about the United States. Nationalism gradually diminished – but was not eradicated – and there was a general cultural acceptance by the military of democracy in Mexico as the new norm. This new generation of military officials has had a greater degree of interaction with their civilian counterparts and has learned to accept and respect political parties beyond the PRI.

In turn, this change in the attitude of a more institutional defense apparatus was positive for public opinion. The armed forces went from being almost totally unknown to being acknowledged and recognized for their support to the country. The press began to report regularly on the armed forces after the outbreak of the Chiapas crisis. The negative stereotypes going back to the 1960s and 1970s were left in the

past, and the fact that the cease-fire was agreed to on January 12, 1994, helped strengthen the people's perception of the army.

Civil-military relations in Mexico are based on vertical democratic control. The executive branch awards military rank, but the lack of reporting mechanisms and regulations and legislation prevent extensive democratic control by other parts of the executive branch¹⁰⁵ or the legislative and judiciary branches. Similarly, there is no intense civilian-military relationship between the armed forces and civilian society due to the lack of formal information distribution mechanisms, and relationships with the press and non-governmental organizations are marginal. Another factor that prevents further horizontal civil-military relations is there is no civilian national defense ministry, so there is no civilian elite specialized in defense matters among public officials.

There is still a fourth cycle of professionalization and modernization concerning the missions and doctrine of the armed forces. Being assigned multiple tasks (largely non-military) is a clear sign of the lack of capability of non-military components of the Mexican government that should play a role in the security sector. This lack of non-defense capacity at the federal, state, and local levels has resulted in defense functions being superimposed atop those of security (such as federal, state, and local law enforcement functions). The non-military activities of SEDENA and SEMAR stand out because they are missions legally assigned to other state ministries and levels of government. So, the key to demilitarize these activities is professionalization and creating complex structures in the civilian governmental apparatus so the armed forces can concentrate on their specialized missions.

Regarding human rights, the past debate was centered on the war against counterinsurgency, focusing on the 1970s and the army's actions in Guerrero and marginally in Chiapas. The future may hold a discussion of how to wage war on transnational criminal organizations at the operational level, with or without respecting human rights. The military justice system is also increasingly examined

due to how members of military institutions have been prosecuted, questioning the “jurisdiction” derived from the application of the Code of Military Justice. Many analyses mention trends in the application of military justice: (1) failure to prosecute controversial actions involving human rights (for example, the lack of investigations on their member’s participation in 1968, the counterinsurgency period, actions as public security agencies, and some “vox populi” drug trafficking accusations) that would result in impunity, and (2) the severity with which armed forces members have been punished in other cases, emphasizing the disparity of sentences compared to equivalent civilian crimes, the fragility of protection and defense, and the fact that military justice operates without the independence of the judge and accuser.

A positive factor is that the concept of the “internal enemy,” which has focused on communist and leftist groups (armed and unarmed) often fought without legal recourse, has decreased significantly. At the start of the 21st century, the armed forces’ constitutional order and the democratic political system were decisive factors in the country’s new security paradigm. For that reason, security challenges, both structural – such as poverty – and political and social – like drug trafficking, organized crime, criminal activity, armed movements, and terrorism – threats not only to the state and government but to the entire nation and its population, can be faced with the active support of society and with broad government legitimacy. However, resorting to the armed forces for non-military missions remains a factor of “functional, utilitarian necessity.”

Mexico has an extensive national security agenda, and the armed forces are responsible for responding to many non-military threats. In addition to the traditional constitutional missions of defending sovereignty and the need for efficiency in internal operations, Mexico’s national security agenda includes collaboration in the international defense and security system. This would entail new transnational missions – such as fighting drug trafficking and terrorism outside its borders – for which the Mexican armed forces are not sufficiently trained at the operational level. However, for the new generation, international military missions such as military

maneuvers or peacekeeping and peacebuilding, the armed forces are obstructed for different reasons: Legal (the president's constitutional restriction on ordering troop deployments due to the need for congressional authorization); historical, since this has only been experienced in World War II; technical-operational, because they do not have the personnel training and equipment; and doctrinal and ideological (due to an isolationist and nationalist sentiment in the political elite that would prevent sending troops).

The very recent "creation" of the *Guardia Nacional* in Mexico adds a wrinkle to this complex picture. Although established in the 19th century, Mexico had never constituted the organization as a force-in-being. The ongoing insecurity challenge affecting Mexico called for creating an intermediate force similar to the French gendarmerie or the Italian *Carabinieri*; Mexico doesn't lack a militarized security force but rather a strengthened civilian police force. The initial concept of a civilian-led, civilian-constituted force has instead become a de facto national military police institution, headed by a retired army major general and currently run by SEDENA. Although it is a positive development that police functions are gravitating from SEDENA and SEMAR to the *Guardia Nacional*, the fact that it – for all intents and purposes – is a militarized police force represents an opportunity lost. Mexico continues to need a capable and reliable national police entity.

Lastly, in connection with the fourth cycle of modernization and professionalization of the Mexican armed forces, overdue reform in national security and defense matters remains to be achieved. National security and defense must be differentiated; failure to do this has led to the overload of internal non-military missions and civic action. Thought must be given to the direction for modernization and professionalization of the armed forces. Therefore, it is necessary to revise the current structure – which was functional for the Mexican Revolutionary regime – on the doctrinal, legal, institutional, and judicial levels based on Mexico's new domestic political and international context, in which international defense cooperation is demanded at many levels, including global, regional (Western Hemisphere), and subregional.

CONCLUSION

As with any study of military culture, the Mexican case is highly complex. This relatively brief examination has attempted to identify the wave crests, but the subject lends itself to much deeper study and analysis. The good news of this long story is the attitude of the Mexican armed forces has trended from hatred to grudging cooperation to indifference, and, within the past 20 years, to one of gradually increasing coordination and developing levels of trust with its neighbors to the north. However, recent events such as the arrest of former Defense Secretary General Salvador Cienfuegos (October 2020) serve as a reminder that a more fully developed level of trust between the two countries has not yet been cemented. This also has implications for the bilateral defense relationship.

Another challenge for both SEDENA and SEMAR is improving their human rights record, SEDENA in particular. As military forces organized, trained, and equipped for a defense function, as opposed to a policing role, the emphasis was on loyalty and discipline, not concerns for human rights, per se. As the military was given a larger role in the fight against transnational criminal organizations, increased opportunities for corruption and human rights abuses were bound to occur.¹⁰⁶ However, and notwithstanding the previous discussion regarding the newly formed National Guard, Mexican military culture must evolve to embody greater respect for democratic values and the protection of human rights.

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21. Deare, *A Tale of Two Eagles*, 50.
22. Díaz governed for the first time between 1876 and 1880, Manuel González was President between 1880 and 1884, and Díaz returned to power in 1884. Díaz was the strong man in the González government. He was reelected eight times, being careful to hold elections every four years (the presidential term was changed to six years in 1904); electoral fraud and voter manipulation were the norm.
23. Howard J. Wiarda with the assistance of Carlos Guajardo, "Mexico: The Unraveling of a Corporatist Regime?," *Journal of Interamerican Studies and World Affairs*, Vol. 30, No. 2 (1988): 2.
24. Roderic Ai Camp, *Generals in the Palacio. The Military in Modern Mexico* (New York: Oxford University Press, 1992): 43.
25. Government of Mexico, *Breve Historia de la Escuela Naval de México* (Mexico City: SEMAR, accessed January 12, 2021), <http://semar.gob.mx/unhicun/libros/>

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26. Leticia Rivera Cabrieles, "El desembarco y la ocupación del puerto de Veracruz: el caso de la Escuela Naval Militar," in Government of Mexico, Secretaria de Marina-Armada de México, *La Invasión a Veracruz en 1914: enfoques multidisciplinarios* (Mexico City: SEMAR, 2015), 360.
27. Frederick Katz, *The Secret War in Mexico: Europe, the United States, and the Mexican Revolution*. Chicago: University of Chicago Press 1981, 110-111.
28. Robert Quirk, *An Affair of Honor: Woodrow Wilson and the Occupation of Veracruz*, University of Kentucky Press, 1962, 3-14.
29. Deare, *A Tale of Two Eagles*, 32-49.
30. I don't know where endnote #28 is.
31. In 1940, before the beginning of WWII, the United States was spending 18 percent on the military. By 1945, those expenditures were 89 percent. Defense expenditures averaged more than 30 percent during the Cold War, and have dropped to approximately 15 percent in the past five years. Source: Historical Tables of the Office of Management and Budget, <https://www.whitehouse.gov/omb/historical-tables/>.
32. The *Escuela Superior de Guerra* accepts foreign students and officers from Central America, the Dominican Republic, and the United States attend regularly. The academic curriculum centers on aspects of military strategy, combat tactics, war games and logistics, and military planning.
33. Founded in 1932, the Superior War College is a pillar of the upper-level military education system. See: SEDENA, *Escuela Superior de Guerra, LX Aniversario*, México, 1991, 48-50.
34. Gaylord TM. Kelshall, *The U-Boat War in the Caribbean*, United States Naval Institute Press, 1994, 7-22.
35. The Joint Mexican-U.S. Defense Commission was created on January 12, 1942. See: Deare, *A Tale of Two Eagles*, 58.
36. This was authorized by the Mexican Senate in December 1941 before the formal declaration of war.
37. Stetson Conn, Rose Engelman, and Byron Fairchild, *The Western Hemisphere, Guarding the United States and its Outposts (United States Army in World War II)* (Arlington, VA: U.S. Department of the Army, 1964), chapter XIII, "The United States and Mexico: Solidarity and Security," 331-363.
38. Stephen J. Wager, *The Mexican Army, 1940-1982: The Country Comes First* (Stanford: Stanford University, 1992), 55.

39. This is an interesting case in which an active duty general or flag officer essentially takes a three-year leave of absence and serves as an appointed member of the Senate or Chamber of Deputies, usually in the Committee of National Defense or Committee of the Navy.
40. The military “code” is formally stated in the military justice system through the Code of Military Justice. At the political level it gives members of the military a high degree of impunity.
41. It is highly symptomatic that, although the military yielded power to civilians in 1946, all the chiefs of the PRI were military until 1964: Rodolfo Sánchez Taboada (1946-1952), Gabriel Leyva Velásquez (1952-1956), Agustín Olachea Aviles (1956-1958), and Alfonso Corona del Rosal (1958-1964). This shaped an ideology and a strong discipline within the party to achieve political control of its militancy by constructing a series of mechanisms of control and cooptation to avoid dissidence. In other words, the armed forces yielded presidential power at the institutional level but continued to hold strong control of the political and corporate apparatus at the personal level. General Alfonso Corona del Rosal, appointed Regent of the Department of the Federal District by Gustavo Díaz Ordaz, is considered one of the major authors of the repression of the 1968 student movement. In other words, between 1929 and 1964, the PRI was directly controlled by military men.
42. Multiple off-the-record interviews with senior generals and flag officers show broad consensus that training and education are key elements that not only increase professionalization, but are largely responsible for the emergence of a military culture in both the army and navy.
43. See note 40.
44. Camp, *Generals in the Palacio*, 137.
45. Thomas Rath, *Myths of Demilitarization in Postrevolutionary Mexico, 1920-1960* (Chapel Hill: The University of North Carolina Press, 2013), 142.
46. Sergio Aguayo Quezada, *Los Archivos de la Violencia* (Mexico City: Grijalbo, 1998); and Julio Scherer and Carlos Monsivais, *Parte de Guerra. Tlatelolco 1968: Documentos del General Marcelino García Barragán: Los Hechos y la Historia* (Mexico City: Nuevo Siglo-Aguilar, 1999).
47. Jaime López, *Diez Años de guerrillas en México. 1964-1974* (Mexico City: Posada, 1974).
48. Raúl Benítez Manaut, “Las Fuerzas Armadas Mexicanas a Fin del Siglo, Su Relación con El Estado el Sistema Político y la Sociedad,” in *Reconversión Militar en América Latina*, ed. Gabriel Aguilera (Guatemala: FLACSO, 1994), 72.
49. Brig. Gen. D.E.M. Luis Garfias Magaña, “El ejército mexicano actual,” in *El ejército mexicano. Historia de los orígenes hasta nuestros días* (Mexico City: Secretaría de la Defensa Nacional, 1979), 526.

50. Report of President Gustavo Díaz Ordaz in 1969: "I take full personal, ethical, social, legal, political, and historical responsibility for the government's decisions with respect to the events of last year," Sergio Aguayo Quezada, 1968. *Los Archivos de la violencia* (Mexico City: Grijalbo, 1998), 303.
51. Aguayo Quezada, 1968. *Los Archivos de la Violencia*, 251.
52. Deare, *A Tale of Two Eagles*, 65-71.
53. Kate Doyle, *The Tlatelolco Massacre: U.S. Documents on Mexico and the Events of 1968*, National Security Archive Electronic Briefing Book No. 99, October 10, 2003, <http://nsarchive.gwu.edu/NSAEBB/NSAEBB99/>.
54. Sergio Zermeño, *México: Una Democracia Utópica. El movimiento estudiantil del 68* (Mexico City: Siglo XXI, 1978).
55. Carlos Montemayor, *Guerra en el Paraíso* (Mexico City: Diana, 1991).
56. Thomas Benjamin, *A Rich Land. A Poor People. Politics and Society in Modern Chiapas* (Albuquerque: University of New Mexico Press, 1989); Elaine Katzenberger, *First World. Ha, Ha, Ha* (San Francisco: City Lights Publishers, 2001); EZLN. *Documentos y Comunicados*, Vol. 1 (Mexico City: ERA, 1995); EZLN. *Documentos y Comunicados*, Vol. 2 (México City: ERA, 1996); Carlos Tello Díaz, *La Rebelión de las Cañadas* (Mexico City: Cal y Arena, 1995); Mario Melgar et al., *La rebelión en Chiapas y el derecho* (Mexico City: UNAM, 1994); and *Chiapas*, 4 volúmenes (Mexico City: Instituto de Investigaciones Económicas, UNAM, 1995-1997).
57. Tello Díaz, *La Rebelión de las Cañadas*, 60-85.
58. "Aniversario de la formación del EZLN, 19 de noviembre de 1994," in *EZLN, Documentos y Comunicados*, Vol. 2, 131.
59. *La Jornada*, Mexico City, January 7, 1994. This needs an article title (and writer if there is one)
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61. Davis F. Ronfeldt and John Arquilla et al, *The Zapatista Social Netwar in Mexico* (Santa Monica: Rand Corporation, 1998).
62. Human Rights Watch/Americas Mexico, *The New Year Rebellion: Violations of Human Rights and Humanitarian Law During the Armed Revolt in Chiapas*, Vol. 6, No. 3 (1994).
63. "Mexico's New Guerrilla Eruption," *World Press Review*, November 1996: 16-17.
64. Armando Bartra, *Guerrero Bronco. Campesinos, ciudadanos y guerrilleros en la Costa*

Grande (Problemas De Mexico) (Mexico City: Ediciones Sin Filtro, 1996).

65. Raúl Benítez Manaut, "Guerrilla. Civilizarse o morir," *Enfoque-Reforma* (January 5, 1997).
66. Article 89 Section VI states that the executive branch "may dispose of the entire permanent armed forces, i.e., the Land Army, the Navy, and the Air Force, for the internal security and external defense of the federation," *Constitución Política de los Estados Unidos Mexicanos*, (Mexico City: Federal Electoral Institute, 1997), 76.
67. Raul Benitez Manaut, "Security and Governance: The Urgent Need for State Reform," in *Mexico's Politics and Society in Transition*, eds., Joseph Tulchin and Andrew Selee (Boulder: Lynne Rienner, 2003), 62. This mission is not stated in the constitution but is indicated in the respective charter laws of the Mexican Army, Air Force, and Navy.
68. "Birth of a New Generation of Combatants: 'Special Forces,'" *Revista del Ejército y Fuerza Aérea Mexicanos*, Period III, Year 93 (January 1999): 30.
69. Deare, *A Tale of Two Eagles*, 171-183.
70. The subject of the army's civic action is analyzed in the following books: Wager, *The Mexican Army, 1940-1982: The Country Comes First*, 219-246; and José Luis Piñeyro, *Ejército y Sociedad en México: Pasado y Presente* (Mexico City: UNAM, 1985).
71. The report on army and air force work from September 1973 to August 1974 lists the "social work" of the army and air force. This includes: Reforestation, medical visits, vaccination, veterinary visits, restoring schools, distributing potable water, literacy training, and distributing grain mills, food supplies, clothing, and household equipment. See: Piñeyro, *Ejército y Sociedad en México*, 163.
72. Government of Mexico, *Memoria del Sector Defensa 1976-1982* (Mexico City: SEDENA, 1982).
73. Kate Doyle, "The Militarization of the Drug War in Mexico," *Current History*, Vol. 92, No. 571 (1993): 83.
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93. Deare, *A Tale of Two Eagles*, 178-182, 188.
94. 94 For more detail, see: Government of the United States, "U.S. - Mexico Border Partnership Action Plan," The White House, March 2002, <https://georgewbush-whitehouse.archives.gov/infocus/usmxborder/22points.html>.
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