



A Bond Worth Strengthening

Understanding the Mexican Military and U.S.-Mexican
Military Cooperation

By Iñigo Guevara Moyano

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Introduction

Balancing an Asymmetrical Relationship

For two neighbors that share an annual trade worth USD 534 billionⁱ along a 2,000-mile border, understanding each other's strengths and weaknesses should be a priority. This paper is meant to provide a deeper understanding of the Mexican military and its contribution to the defense and security of North America. It does so by analyzing the evolution of Mexico's armed forces, and the past and present cooperation between the Mexican and the U.S. militaries.

Trying to establish a relationship of equals is no easy task when one of the partners is the most powerful military in the world. The U.S. military has developed global power projection capabilities since the early 1940's and unarguably remains the most powerful military force in the world. The Department of Defense's FY 2017 budget request of USD 582.7 billion still ranks the United States as the top defense spender in the world,ⁱⁱ creating a gap with the next five big spenders worth several hundred billion dollars. Yet other major powers—particularly China and Russia—devote additional GDP points to defense-related research and development (R&D) and to build their own power projection capabilities, sometimes in non-traditional scenarios, such as cyber and space. At the same time, a host of non-state threats spark and spread in the Middle East, South West Asia, the Horn of Africa, Central and South America, the Caucasus and into Western Europe, demanding that militaries take a more active role in internal security and homeland defense. With that fast changing scenario, the US in the long-term will need to rely more on the strength of its allies.

In sharp contrast to the U.S. defense budget, Mexico's military will muster a meager USD 7 billion for 2016.ⁱⁱⁱ The Mexican operational mindset has long been focused on domestic operations with little concern for the global scenario. That mindset has begun to change, as Mexico aims to become a proactive player in the international scene. In a changing and insecure world, this posture shift requires the creation of world-class armed forces that can protect Mexico's economic interests and contribute to regional and global stability.

In September 2014, Mexico's President announced that the military would begin to deploy international peacekeeping operations^{iv} and it has since upped its participation in international military exercises, particularly with the United States. The increased Mexican military participation is meant to show that the defense, security, and stability of North America are now a shared responsibility of Canada, the United States and Mexico.

After decades of isolation, the Mexican military is modernizing both in equipment and mindset. It will have many more challenges ahead beyond its new commitments in the international scene, as it will still be needed domestically as a stalwart for stability.

Respect for human rights will continue to be an important issue in Mexican civil-military relations.

While the bilateral defense correlation will remain asymmetrical, Mexico's armed forces are seeking to improve in quality and capabilities. Over the past decade, the Mexican military has been crafted into a hardened and more professional military, skilled in fourth generation warfare, operating across the spectrum of conflict from surgical small-unit Special Forces missions to division-level stability operations in areas comparable in size to Belgium. As new—state and non-state—threats loom on the horizon, the U.S. and Mexican militaries will need to rely on deepening their connection and increasing bilateral trust to build a stronger and interdependent defense relationship.

The increase in dialogue and cooperation builds trust and promotes mutual understanding between Mexico and the United States, crafting deep ties between both militaries during a time when the radicalization of political ideas threatens to transcend electoral campaign rhetoric and affect the economic and social fields of North America.

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Chapter 1

Understanding Mexico's *sui generis* Defense Structure

The Confusing Two Ministry Defense Architecture

Mexico's political defense structure is unique in that it has not one, but two defense ministries: the Ministry of National Defense (SEDENA: *Secretaría de la Defensa Nacional*) and the Ministry of the Navy (SEMAR: *Secretaría de Marina*).

As Commander in Chief of the armed forces, the President exercises the one and only civilian authority over the military.

SEDENA is in charge of the Army, which is by far the largest of the armed forces, and the Mexican Air Force (FAM: *Fuerza Aérea Mexicana*), which is relatively small by comparable international standards and mostly equipped, trained, and tasked for army support. SEDENA is headed by an active-duty four-star Army General. The Army reports directly to SEDENA through twelve geographic Military Regions.

SEMAR is headed by a four-star Admiral and is in charge of the Mexican Navy (ARM: *Armada de Mexico*), which in turn is composed of the General (Surface Fleet), Marine Infantry, and Naval Aviation Corps.

The SEDENA and SEMAR secretaries have equal standing in the federal government's political cabinet. Both secretaries are appointed by and report directly to the President. Each of the ministries has a High Command Staff that includes an Undersecretary, First Officer, Inspector General/Comptroller and Chief of Staff—all of whom are three-star generals and report directly to the secretary.^v

The FAM also has a unique "Command" status within SEDENA, and its commander is a three-star Air Force General, roughly considered at the Undersecretary level. The FAM Command Staff is composed of a Chief of the Air Staff, a Deputy Chief for operations and a Deputy Chief for administration, all of whom are usually two-star Air Force generals.^{vi}

Existing Joint Institutions

Active military officers from all branches coincide only at the Presidency level through the Presidential Chief of Staff (EMP: *Estado Mayor Presidencial*). The EMP was originally created during World War Two (WWII) to coordinate all forces under a single command, but it has since developed into a Presidential Guard-type organization. The General Coordination of Presidential Air Transportation (CGTAP: *Coordinación General de Transportes Aéreos Presidenciales*) is also a military unit assigned to the Presidency and flies aircraft and helicopters with FAM titles, although these support the executive directly.

In theory, the other joint services organization is the Armed Forces Social Security Institute (ISSFAM: *Instituto de Seguridad Social de las Fuerzas Armadas Mexicanas*) that administers SEDENA and SEMAR's benefits and pension systems, although organically it falls directly under SEDENA.

Within SEDENA, the National Defense Chief of Staff EMDN (Estado Mayor de la Defensa Nacional) is an Army-Air Force organization.

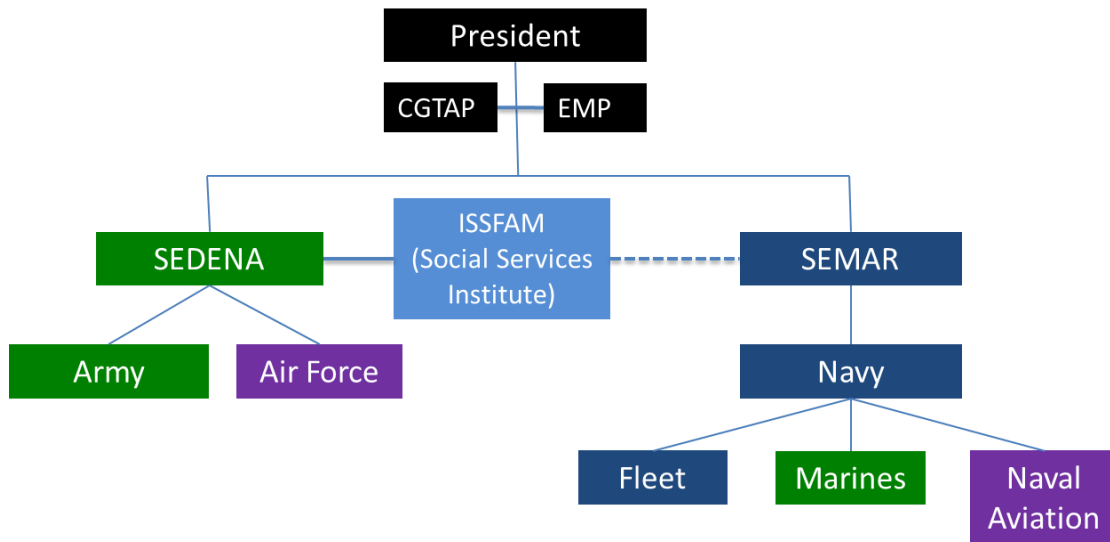


Figure 1. Overview of major institutions and force structure. Source: author

Civilian Oversight

Mexico's Congress has the constitutional power to stand up and reorganize military forces. It is also,—at least on paper—, the main decision-making body to allocate the national budget for defense matters.

Legislative oversight is composed of separate National Defense and the Navy commissions in the Lower House^{vii} and Senate,^{viii} as well as a bicameral National Security commission. The legislative commission's level of engagement is traditionally low, mainly due to the lack of a subject matter, professional staff could understand defense, military or national security matters.

Other than the President—who will rarely be directly involved in military decision making matters—there are no other civilians with political decision authority over defense matters. Is this a good or a bad idea? Well... there are arguments to support both.

Pros and Cons of Existing Structure

One argument in favor of the current all-military structure is that the lack of civilian politicians at the Defense or Navy secretary level allowed the military to remain outside from civilian politics as much as possible.^{ix} That distance from politics—the farthest of any other military in the western hemisphere—is credited with stability throughout the second part of the 20th Century: unlike all other large countries in Latin America, Mexico did not experience a military revolt or coup since the uprising of Saturnino Cedillo in San Luis Potosi in 1938.^x

Another argument is that Mexico’s personality-centric political culture has traditionally favored individual loyalty over talent, experience, or subject matter expertise, particularly when appointing high-level positions. While this may resonate in other political appointee systems worldwide, the practice cascades through the senior and mid-level decision-making positions, unavoidably leading to deep institutional weaknesses. In sharp contrast to the military, the current—and recurring—crisis of Mexico’s civilian law enforcement, national security, and judicial institutions managed by political appointees instead of professional civil servants affects the population’s trust in institutions.^{xi}

% of Mexicans that responded they have some or much trust in the following institutions	2011	2012	2013	2014	2015
Municipal Police	33	31	37	37	36
State Police	40	38	43	44	43
Federal Police	51	51	55	58	56
State Attorney General's Office	35	34	39	43	42
Federal Attorney General's Office	NA	NA	NA	51	49
Navy	79	81	83	84	82
Army	76	80	80	81	78

Source: INEGI ENVIPE

There are also solid arguments for the need to establish a civilian-staffed defense ministry: the lack of civilian participation in defense matters is evident in that there has yet been a published National Defense Policy. In its absence, the military interprets and aligns to each administration’s National Development Plan, creating sector-specific short-term white papers. The result has traditionally been short-term planning and implementation, with few long-term development projects.^{xii} Recent strides to correct this have been made out of necessity, mainly to procure large defense infrastructure programs like airspace surveillance or command, and control systems. In sum, long-term defense planning is rare.

Some of Mexico’s leading civil-military relations experts point out that the lack of a civilian staffed defense institution hampers the military’s ability to demand financial resources from Congress and makes due with whatever funds are assigned by the Ministry of the Treasury and Public Finance (SHCP).^{xiii}

Likewise, definition of the armed forces' legal mandate as to its law enforcement role remains ambiguous and open to interpretation, which may endanger the military's actions in the long term. Defense of the military's human rights record is also left to the military leadership, which is inappropriately staffed and inadequately positioned to fend for the institution in national or international settings.

Upcoming Reforms

SEDENA announced plans in December 2014^{xiv} for a significant internal re-structuring as part of its 2013-2018 National Defense Sector Program. The restructure envisions the creation of two new undersecretary positions and the establishment of a new Army structure.

The two new undersecretary positions proposed are Undersecretary for Operations and Undersecretary for Military Education and Training. These would add to the existing undersecretary of defense, allowing the latter and the Secretary to concentrate on policy making. The reform would also establish a new Command structure for the Army, making it similar to that of the Air Force and leading to the creation of a new position: Commander of the Army. This new position would further separate the operational functions from policy within SEDENA. According to the 2015 National Development Plan-National Defense Sector achievement document, the new undersecretary positions as well as an Army HQ (Comandancia del Ejercito) positions have been created, although as of September 2016 they have not been staffed.^{xv}

The Secretary of the Navy is also planning a re-structuring, with a marked emphasis in differentiating the Navy's Coast Guard from the Blue Water Navy forces. The Navy's existing naval zones and regions, SAR network plus new port security forces will be re-organized into the Coast Guard, while the much smaller Blue Water Navy (Marina de Guerra) will be formed with the Pacific and Gulf of Mexico destroyer and auxiliary fleets plus amphibious marine brigades. While unstated, this may lead to the establishment of a Coast Guard Command and a Navy Command.

The creation of commands of an equal status—Army, Air Force, Coast Guard and Navy—would enable the creation of a Joint Chiefs of Staff-type structure somewhat similar to that of the United States.

Chapter 2

From Distant Neighbors to (Temporary) Allies

Early Beginnings: An Army Born for Internal Security

Mexico's complicated defense structure reflects the country's complex political culture, unique geostrategic position, and the largely internal security requirements that continue to dominate the military's roles and missions.

The current Army was created in 1913, when Mexico was three years into the bloodiest civil war in the western hemisphere. The extreme violence, as well as common crime, disease, and famine associated to the chaos of civil war led to 1.5 million deaths between 1910 and 1921.^{xvi} That is roughly equivalent to all U.S. military casualties since the Revolutionary War to Iraq-Afghanistan.^{xvii}

With the U.S. territorial expansion behind and the Monroe Doctrine in full effect, the Mexican Army's main role during its formative years was not to fend off a foreign invader; it was to become the stabilizing internal security force.

During the 1920's, the Mexican Army played a major role in stabilizing the country. In 1925, then-Secretary of War, General Joaquin Amaro attempted to reform the various revolutionary factions to build a modern and professional Army.^{xviii} However, ever since, Mexico's army has required assistance from irregular forces in times of emergency. Between 1926 and 1929, the Army's manpower was 75,000 troops, but had to be assisted by an additional 30,000 irregular forces to face the *Cristiada* uprising in central Mexico.

After nearly two decades of on-and-off irregular warfare between different factions, in 1929, General Plutarco Elias Calles created the National Revolutionary Party (PRN: *Partido Revolucionario Nacional*) with the goal of assuming control of Mexico and provide it with the necessary stability to prosper. Calles' vision set off what would be a 71-year old regime that favored stability over democracy, a period appropriately dubbed the *Perfect Dictatorship*. Calles created a system that ensured power was shared among the PRN's multiple political factions and collectives.

The PRN would change its name to Party of the Mexican Revolution (PRM) in 1938 and finally to the Institutional Revolution Party (PRI) in 1946. The original idea remained the same: no one individual would be able to become dominant and maintain power over long periods of time.

For such a regime to prosper, it needed to have significant control over all aspects of Mexico's society including its business, cultural, and criminal sectors. The regime therefore preferred the establishment of monopolies, through which it could exercise control. A strong judicial system composed of efficient police, legal, and prison sectors, was therefore not only ignored, it was discouraged. These cornerstones of democracy were simply not required.

Organization of the country remained within a federal system that divided the territory into states, and these into municipalities. Governors and municipal presidents (mayors) would rule over the territory and be responsible of maintaining control of the local population. Each state governor would sustain *ad hoc* police forces to maintain order. In turn, the Federal Government deployed the Army through a territorial control structure similar to the Soviet model, maintaining a close watch on the state and municipal authorities. It became the federal government's eyes and ears in the countryside.

The Governor's Oversight: The Army's Early Political Police Role

The new Army organized on a territorial division system that mirrored the political division, creating a Military Zone (ZM: *Zona Militar*) per state. At that time there were 29 states and two territories plus the Federal District. Each ZM was assigned one or two infantry battalion and a cavalry regiment under the command of an Army General designated Zone Commander. Eventually, zone commanders would rotate to prevent any one individual from developing a personal power base or too much sympathy with the state governor.^{xix} The zone commander's principal mission was to serve as a counter balance to the governors, and limit their power.^{xx}

The creation in 1929 of the Army War College (ESG: *Escuela Superior de Guerra*) was meant to further professionalize the Army officer corps by creating a military career service that could quickly replace the ageing revolutionary commanders turned Generals. However, the need for a large and united military was discouraged by Mexico's political masters, since that sort of organization could amass power and eventually lead to instability. From 1929, both the military and civilian leaderships began to develop processes by which to interact with each other.^{xxi}

Given that the U.S. territorial expansion had ended, and neighboring Guatemala did not pose a threat, the 'new' Mexican military only needed to be *strong enough* for its internal security role. During the formative periods of the 1920's and 1930's there was very little contact with the outside world, as the armed forces were subjected to an intense nationalistic doctrine.

Internal security and the need to serve as a balancing force that provides stability have been the founding principles of the modern Mexican Army. The domestic policing role has made it one of the most inward looking institutions in Mexico; an institutional mindset that has only begun to change in the early 21st Century.

The Need for External Defense and Creation of the Ministry of the Navy

With WWII approaching, the Mexican armed forces re-organized to fend off a possible Axis-forces invasion. External defense became a priority and the military was re-structured as a political institution. The Ministry of War and Navy (SGM: *Secretaría de Guerra y Marina*) became the Ministry of National Defense (SEDENA) in 1937, with the Army as the dominant service. Following the October 1939 Panama Declaration^{xxii} further changes would take place as the armed forces would be forced out of isolation and led to the creation of the autonomous Department of the Navy in December 1939. Mexico's then President, General Lázaro Cárdenas, planned the reorganization. Pro-Marxist and extremely nationalist, Cárdenas was above all pragmatic, and understood that the Mexican military required modern technology, such as radars, that were then only available from the United States. Cárdenas finished the first full six-year presidential term in November 1940, and handed power over to General Manuel Ávila Camacho, who would be the last military president of Mexico.

In December 1940, to further prepare the country for war, Ávila Camacho elevated the Department of the Navy to a full cabinet-level ministry, creating the Ministry of the Navy (SEMAR). SEMAR would be in charge of the Merchant Marines and the re-organization of what was considered a modest Navy. Ironically, the first Secretary of the Navy was an Army General.

SEMAR's mission would be to patrol a 7,000-mile coast and protect multiple ports with an inadequately equipped navy. Imminent wartime planning identified five strategic areas vulnerable to enemy attack:

- Baja California peninsula
- Sea of Cortez (aka Gulf of California)
- Southern coast of Oaxaca and Chiapas
- Tamaulipas coast
- Yucatan Canal

The first three were especially sensitive as they would be the most likely landing points of a Japanese force that could stage an invasion of the southern part of the United States. A German invasion of the Gulf coast would be less likely; however, German submarine activity was a concern, particularly as it could threaten supply routes into Tamaulipas and Veracruz.

SEMAR had inherited a small fleet of mostly outdated gunboats, but soon began plans to stand up a fleet capable of protecting Mexico's coasts. The initial draft of requirements for Mexico's wartime fleet was for 24 Serrano-class destroyers, ten Electric Boat R-class submarines, ten minelayers, 60 motor patrol boats, six tugs and 200 aircraft.^{xxiii} The submarines and aircraft would patrol the Yucatan canal while SEMAR eventually required

aircraft carriers that could facilitate maritime patrols on both coasts.^{xxiv} None of those requirements were ever met.

The Army Re-structures for War

The Army was reorganized in order to create three large territorial defense regions: Pacific, Gulf, and Isthmus.^{xxv} Defense of the Baja California peninsula became the priority, as a possible Japanese invasion was perceived as the main threat to Mexico's sovereignty. As war came closer, on December 10, 1941, three days after the Japanese attack on Pearl Harbor, President Ávila Camacho enlisted the full political support of former president Lázaro Cárdenas and appointed him Commander of the newly established Military Region of the Pacific (RMP).

Cárdenas set up his headquarters in Ensenada, in the Baja California territory, some 60 miles south of California. The RMP included all military forces and installations located on the Mexican Pacific coastal states, from the border with the US to the Guatemala border.

U.S.-Mexican Joint Defense Planning

Presidents Franklin D. Roosevelt and Manuel Ávila Camacho established the Joint Mexico-United States Defense Commission (JMUSDC) on February 27, 1942. The JMUSDC was tasked with defining threats to the security of both countries and would submit plans for joint defense initiatives. JMUSDC set up a lend-lease agreement a month later and a military assistance program on April that would allow Mexico to receive equipment to modernize its air and mechanized forces worth up to USD 18 million (USD 263 million in 2015 dollars) during WWII.^{xxvi} The equipment included three radar sets to establish surveillance sites in Baja California and serve as an extended coverage of the then US Western Defense Command.^{xxvii} The radars would become a subject of controversy, as General Cárdenas insisted that they be manned only by Mexican troops.

Declaration of War

On May 13, 1942 the *Potrero del Llano* oiler was sunk by U-564, a German U-boat, followed by *Faja de Oro*, which then was sunk on May 20, 1942 by U-106. Mexico officially entered the war on May 22, 1942.

As part of its re-organization, the Army created the 1st Infantry Division in 1942 and soon followed with two more.^{xxviii} Establishment of large units—brigades and divisions—immediately showed how ill-prepared the Mexican Army was for modern warfare, as it lacked the proper logistics to support division-level maneuvers, and combined arms

doctrines did not exist. As with the *Cristero* uprising, a system of rural defense forces was re-created in order to assist the Army in maintaining control of the countryside and potentially serving as reinforcements in the event of an invasion by axis troops. In practice, the army continued to prefer the use of smaller units of battalion or reinforced company size as the main operational unit: a doctrine that has survived well into the 21st century.

Ávila Camacho's administration originally intended to deploy the 1st Infantry Division to either of the theaters of operation, but he encountered strong resistance from the SEDENA high command, including former President Cárdenas. Using the Brazilian Army's 25,000-strong Army Division that deployed to Italy as a benchmark, the SEDENA high command emphasized that development of the Mexican 1st Division into a modern fighting force would require significant national resources, and it would only provide a symbolic support to the allied cause.^{xxxix} Ávila Camacho's initiative was therefore redesigned as WWII proved that airpower was becoming the dominating force in modern conflicts, entrusting the FAM to carry out Mexico's WWII symbolic military contribution.

The FAM created the Expeditionary Air Force (FAEM), which was to be made up of three fighter squadrons: one in active duty, one in reserve, and the third in training.^{xxx} The first 300-man unit, the 201st Squadron, was equipped with Republic P-47D Thunderbolt fighter-bombers bought by the Mexican government in July 1944. The unit undertook training at airfields in Texas and Idaho, and it embarked towards the Philippines on March 1945.

The 201st began operations in May 1945 as part of the 58th Fighter Group of the 5th U.S. Air Force.^{xxxi} Operations ended in early August. During its brief participation, the 201st flew 785 offensive and six defensive missions flying 2,557 hours.^{xxxii} Five Mexican pilots were killed in action, five more died during training and one died of disease.

Less-visible Heavy Lifting: The Deeper War Time Contribution

Besides the 201st Fighter Squadron's symbolic contribution, Mexico's largest and less known direct military contribution to the war effort was a change in Mexico's law. This law enacted as a presidential decree and published in the National Gazette, authorized Mexican citizens residing in countries in the Americas hostile to Axis powers, to serve with the armed forces of their countries of residency.^{xxxiii} Likewise, this law required foreign residents in Mexico to register for military service.

The exact number of Mexicans that fought, as part of the U.S. armed forces in WWII is unknown, but at least 15,000 are accounted for,^{xxxiv} within the broad range of the 250,000 to 500,000 of troops identified as Hispanic by the U.S. armed forces during WWII.^{xxxv} There are no records of foreign nationals serving in the Mexican armed forces.

Chapter 3

Into the Cold War: Back to Basics

Post-WW II Command Structure: Back to Basics

Miguel Alemán Valdés, Mexico's first civilian president (1946 to 1952), sought to maintain the military at arm's length from national politics, but still needed its eyes and ears in the countryside. With the threat of an invasion behind due to allied victories in the Pacific, the wartime tri-military region system ceased to have any use, and the armed forces returned to its politically aligned military zone structure from April 1944.^{xxxvi}

Alemán re-instated the internal security focus from 1946,, but he also created a new territorial command organization that sat between the ZM Commanders and the Secretary of Defense: the Military Regions (RM: *Regiones Militares*).

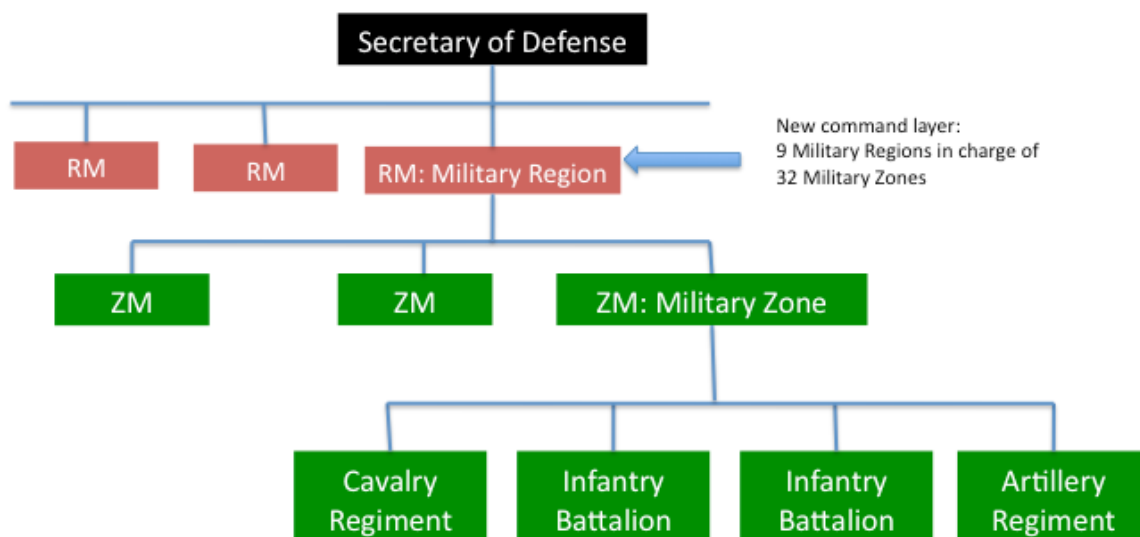


Figure 2. Reorganization into regional command-type structure source: author

Each RM was headed by a three-star general, and was responsible for several ZM's, these being commanded by one or two-star generals. Initially, there were nine RM responsible for the 32 ZM's; eventually this number would increase to 12 RM in charge of 46 ZM, as zones within states were further split and/or modified out of operational necessity. ZM commanders would therefore report directly to a regional commander. Operationally, the new layer of command alleviated the Secretary of Defense's command and control responsibilities. Politically, it distanced ZM commanders from developing direct relationships with state governors or other local politicians. With that rotation system in place, the military contributed immensely to that very complex power-sharing system that made the oxymoronic *Institutional Revolutionary Party* (PRI) a political *Machine*.

Efforts to Expand NORAD

In the immediate post-WWII years, the JMUSDC remained in place, establishing a joint plan for the defense of the United States and Mexico in case of a confrontation with the Soviet Union.

As part of its professionalization process, in 1950, SEDENA drafted the National Defense Direction Plan (*Plan Director de Defensa Nacional*), a strategic document that serves the Army and FAM as guidance to prepare the country's defense. Its first edition, DN-I,¹ was finalized *circa* 1951 and considered the joint defense of North America in the event that the Cold War between the United States and the Soviet Union turned hot.

The U.S. defense priorities shifted towards extending continental air defenses into Canada through the *Pinetree* Radar Extension Plan since August 1951. As Mexico's strategic position rendered the airspace threat to the US as minimal, there was no rush to extend the air defense radar coverage south.^{xxxvii} After deliberation in the United States and Mexico, the Mexico-United States Emergency Defense Plan (MEXUS 100/1) was approved on November 19, 1952. The plan was later described as nothing more than good intentions. MEXUS 100/1 laid out the requirement that air defense forces would agree to cooperate by standardizing procedures, setting up liaison officers, and harmonizing equipment.^{xxxviii}

Efforts to establish MEXUS 100/2 was underway in 1955, but it soon faced delicate sovereignty issues when touching points on the reciprocal use of facilities and areas of responsibility: in 1956, the Joint Western Air Defense Force was entrusted to assist in the air defense of Mexico. CONAD requested six primary radars and 41 gap fillers to establish an air defense zone in Mexico. The next four years saw officers on both sides face significant frustration due to inconsistent postures and shifts in policies, mostly on the part of Mexico, leading to the cancelation of negotiations.

As of 1960, the U.S. Continental Air Defense Command reported it could do nothing further than to state its requirements to a higher authority, thus ending a decade-long negotiation to expand the NORAD area of coverage in failure.^{xxxix}

As the nuclear age bloomed, the Mexican National Defense plan evolved into its second edition. DN-II considered that a superpower confrontation would very likely include weapons of mass destruction; therefore, Mexico's direct participation would be of very little use.^{xl} At around this same time, U.S. Department of Defense (DOD) documents indicate that nuclear-armed missiles launched from Soviet submarines in the Sea of

¹ Multiple US and Mexican academics have misunderstood the SEDENA terminology and opted to assign the DN-I acronym as a mission, believing it refers to the protection of Mexico's sovereignty, however DN-I refers to the original defense plan, with subsequent plans DN-II to the DN-VI.

Cortez (Gulf of California) or in the Gulf of Mexico were the only real concern involving Mexico in a nuclear exchange.^{xli}

Mexico's contribution to the nuclear arms race, however, would be crucial. Mexican diplomacy, led by Ambassador Alfonso García Robles, pressed hard on other countries in Latin America to ban the testing, use, receipt, storage, deployment, or possession of nuclear weapons in Latin America. The diplomatic engagement led to the 1967 Treaty for the Prohibition of Nuclear Weapons in Latin America and the Caribbean, also known as the *Treaty of Tlatelolco*. The Treaty of Tlatelolco has since served as a model for all other nuclear weapon free zone treaties.^{xlii}

Return to the Internal Enemy Mindset

Beyond the side effects of a nuclear war, a large-scale invasion of foreign troops was considered less likely and attention began to shift towards Mexico's growing domestic problems. By the late 1950's, it became clear that Mexico's economic development was not favoring the working class.

Since 1958, internal security became once again the focus of Mexico's defense priorities.^{xliii} Under that rationale, widespread social discontent developed into protests, and these ran the risk of developing into communist backed guerrilla movements that would directly threaten Mexico's stability. The shift in mindset is easily identifiable after 1958, when the Army and FAM stopped the periodic large-scale combined arms exercises they had been undertaking since 1946.^{xliv}

Revisiting the Conventional Dimension

Private fishing boats had repeatedly violated Guatemalan sovereign waters, and the Guatemalan government issued warnings to both the Mexican and U.S. governments in December 1958. The Guatemalan Air Force was ordered to implement Operation Drake to curtail illegal fishing incursions into its territory by what it designated *Pirate Ships*.^{xlv} On December 31, 1958 two North American P-51 Mustang piston-engine fighters' machine-gunned five Mexican shrimp fishing boats; sinking two, killing three Mexican citizens, and wounding another 14.^{xlvi}

Guatemala's reaction was qualified as excessive by Mexico and led to escalated tensions and the break-off of diplomatic relations. At the time the FAM was not equipped to undertake more than transport, reconnaissance, and limited close air support of ground troops. Its North American T-28 Trojan and AT-6 Texan armed trainers would not had been able to obtain air superiority over Guatemala's Mustangs.

Relations with Guatemala were restored in September 1959. However, tensions proved just how unprepared the Mexican armed forces were to project military power against an inferior military force. That led the foundations for the Mexican military to maintain at least a minimal conventional fighting capability. As a result, the FAM sought to increase its conventional capabilities and acquired 15 De Havilland Vampires jet fighters in 1960. The Vampires, which were first generation jets that had formerly served with Canada, were bought from a Wisconsin-based company. Fifteen former USAF Lockheed AT-33A's procured for USD 40,000 via the U.S. Military Assistance Program soon followed the FAM's late entry into the jet age from 1961.

Chapter 4

Role Diversification: Social Action and Counter Narcotics

Kennedy and the Age of Counter Narcotics

In 1961, with the Cold War in full bloom, the United States and Mexico set out to enhance their bi-national narcotics control program. The first documented U.S. and Mexican program was launched in June 1961 after a US Assistant Secretary of the Treasury visited Mexico and discussed drug trafficking.^{xlvii} Under the terms of the cooperation program, the United States was to supply Mexico with two helicopters, two light observation aircraft, ten jeeps equipped with radios, twenty flamethrowers, and 50 rifles with ammunition. The US would also train three helicopter pilots and three mechanics.^{xlviii}

In the spring of 1962, the equipment was delivered to support the thirty Attorney General agents commissioned to this role. The Army was ordered to back them up in their eradication operations in the state of Sinaloa. The aircraft assisted ground units in locating illegal poppy fields in isolated locations which were then either burned using flamethrowers or cut down by hand and machete. One Mexican soldier was killed during the operations. These units located and destroyed 205 acres of poppy fields, and this was deemed the largest eradication campaign to date. Mexico's assessment was that the equipment provided by the United States was useful, but insufficient and that much more assistance would be required to effectively control narcotics production and trafficking.

The Mexican Government's position considered that the United States should be responsible for the costs of fighting production and trafficking, since it was the U.S. consumption that was driving demand. A U.S. Presidential Position paper, dating back to June 22, 1962 stated:

In fact, the equipment probably is insufficient, but this is only one of many problems in controlling Mexican traffic. Narcotics control is basically unpopular among many local officials in Mexico, some of whom are believed to act in collusion with poppy and marijuana growers.^{xlix}

President Kennedy held the First White House Conference on Narcotics and Drug Abuse on September 27, 1962. President Kennedy described:

In my recent conversations with President (López) Mateos of Mexico, we discussed the eradication of illegal drug traffic and agreed to redouble our efforts and our cooperation to achieve it.^l

Thus began a complex saga of good-hearted cooperation, deep mistrust, bilateral recrimination, successes, and failures that have governed the U.S.-Mexico counter-narcotics relationship throughout various decades.

During the 1960's, the Army was deeply involved in internal security operations, conducting counter-insurgency campaigns in the countryside, while also participating as a last resort in operations to quell workers, unions, and student protests.^{li} The 1960's saw

a dramatic shift in the Mexican military's roles by institutionalizing the army's participation in multiple social action campaigns, including large-scale disaster relief operations, but also in important healthcare activities such as vaccination campaigns. This large dose of civil-military engagement proved instrumental in limiting the spread of communist guerrillas in rural areas.^{lii} The Army's darkest period would take place in 1968, when it was called in to reinforce police to contain the growing anti-government student-led movement, culminating in the October 2nd massacre of university students at the *Plaza de las Tres Culturas*. The Tlatelolco massacre broke a fundamental bond between the Mexican military and its citizens: a turning point in civil-military relations; which would need to be rebuilt over time.

The Iconic DN-III: Redefining Civil-Military Relations

The third edition of the National Defense Plan (DN-III) was drafted in the mid 1960's and defined SEDENA's five core missions:

- A) Defense of the independence and territory from a foreign aggressor
- B) Internal security
- C) Support to Government Institutions
- D) Guarantee the exercise of sovereignty: to patrol Mexico's borders from non-state actors
- E) Response to support the civilian population in case of disasters

DN-III-B can be better defined as the military's use in the contention and elimination of guerrilla movements.^{liiii} While not clearly stated, Mexican counter-insurgency operations during the 1970's, particularly in 1975-1976 were highly influenced by U.S. anti-communist doctrine.^{liv}

The overflow of the Panuco River due to Hurricane *Inez* in October 1966 caused severe damage in northern Veracruz and southern Tamaulipas,^{lv} prompting the army to deploy forces in support of the civilian population. The reaction plan was announced as activation of Plan DN-III-E, an acronym that has since become generic for SEDENA deployments in support of the civilian population. While the DN-III has since been updated and is currently in its sixth edition, DN-III-E nomenclature is embedded in the civilian population's relationship with SEDENA to such a degree that it continues to be referred to as DN-III-E.

Operations within DN-III-E include the establishment of military shelters, aid collection centers, air bridges, deployment of medical and dental health units, community kitchens, deployment of clean-up crews, SAR, engineer and security units.^{lvi} Likewise, Plan MARINA is SEMAR's response to assist civilian population in cases of emergency or disasters.^{lvii} Implementation of DN-III-E and Plan MARINA has formed a very strong bond between the

armed forces and populations affected by disasters throughout Mexico, with recent examples including hurricanes *Odile* and *Patricia*.

The military's professionalization in disaster response moved beyond the domestic agenda, and it became the first mission available for international deployments. Since December 1998, the armed forces began to participate in international disaster relief deployments as part of humanitarian assistance missions; for example, when Mexican troops and helicopters were deployed to Central America in the aftermath of Hurricane Mitch.^{lviii} At least 30 deployments to 19 countries have taken place since 1996, with the most relevant for the study of U.S.-Mexico relations being the Army and Navy deployments in support of people displaced by Hurricane Katrina in 2005.

In the aftermath of Hurricane Katrina, SEDENA deployed 196 troops consisting of mainly medical personnel and engineers to San Antonio, Texas to set up a mobile hospital and kitchen facilities at the former Kelly AFB.^{lix} The Navy followed suit deploying a Newport-class LST, as well as Mi-17 helicopters and marines to the Mississippi coast.^{lx}

SEMAR amphibious warfare vessels outfitted for humanitarian disaster relief operations were also deployed to Indonesia in 2005 after the Tsunami and in Peru in September 2007, after a devastating earthquake.^{lxi}

CAN-ADOR: The Counter-Narcotics Role Becomes Official

SEDENA files indicate that the production of cannabis and poppy increased considerably during the 1950's and 1960's to the extent that the Mexican Government had to implement activities to counter its cultivation. This production growth was driven by an increase in demand for drugs among the U.S. population.

The Attorney General's Office (*Procuraduría General de la República*, PGR) was tasked with organizing a large counter-narcotics program that sought to eradicate illegal drug production fields in the area known as the *Triángulo Dorado* (Golden Triangle). The Golden Triangle is an area that sits some 2,000 meters above sea level, deep inside the Sierra Madre Occidental Western mountain range where the states of Durango, Sinaloa and Chihuahua meet. It is a very isolated region with very few roads and an ideal climate for agriculture. Many analysts consider it as the birthplace of Mexican narco-trafficking.^{lxii}

While army troops had been supporting federal operations against marijuana and poppy growers since the late 1950's, the first official use of the armed forces was not recorded until the mid-1960's. In 1966, SEDENA revealed Plan Cannabis-Adormidera (CAN-ADOR)^{lxiii} which became the largest military operation to date in support of another government agency. While the PGR was the lead agency fighting drug production and trafficking, it lacked the appropriate resources and the Army was called in, as part of DN-III-C. Plan CAN-ADOR saw the deployment of up to 3,000 troops^{lxiv} to locate and destroy marijuana and

poppy fields in Chihuahua, Sinaloa, and Durango.^{lxv} Soldiers armed with machetes performed the eradication. Troops assigned to Plan CAN-ADOR were deployed for 12-month tours to some of the most inhospitable areas in Mexico. As a result of the operation several troops deserted, others came back injured and some disappeared.

CAN-ADOR initially comprised mainly search and burn operations. Yet, operational requirements soon led to troops establishing control points in and out of the drug plantation production areas, on roads, but also close to hastily improvised airstrips, to detect and seize narcotics that had already been packed and were about to be transported. Hence, CAN-ADOR quickly expanded from eradication to counter trafficking operations. From that moment on, counter-narcotics became a *de facto* SEDENA mission.

Unsustainable Unilateral Operations

In September 1969, Presidents Gustavo Díaz Ordaz (1964-1970) and Richard Nixon (1969-1974) met at the Amistad Dam, where Nixon expressed his concern over the increasing quantity of drugs being smuggled across the border. Up to 80 percent of marijuana and 20 percent of heroin were thought to be imported through Mexico. The U.S. Attorney General's (AG) recommendation, as of 1969, was to lend Mexico equipment and provide technical assistance on a massive scale that would significantly reduce drug production and trafficking, and then to sell Mexico small quantities of specialized equipment to implement a long-term strategy.^{lxvi} In parallel, a Special Presidential Task Force Report on Narcotics, Marijuana, and Dangerous Drugs, recommended a series of border surveillance enhancements on the U.S. side, while putting narcotics eradication on the U.S. Ambassador to Mexico's highest priority list.^{lxvii}

As a response, the U.S. Government launched a unilateral border interdiction operation named Operation Intercept. Intercept required an unprecedented air and land surveillance program that tackled illegal crossings, but also primarily led to an inspection of every vehicle crossing the border. By October 1969, it was clear that Operation Intercept was also hurting legal trade and that it was not sustainable. President Díaz Ordaz's vowed to intensify Mexico's eradication operations, and Intercept turned into *Operation Cooperation*.

In October 1969, the U.S. Government agreed to provide USD 1 million to procure three Cessna 185 observer aircraft and five helicopters, along with remote sensing equipment for the detection of marijuana and poppy fields. These would join five Cessna 185 and one Aero Commander aircraft, and three Hiller light helicopters used by the Federal Judicial Police that were supported by 6,000 army troops deployed on eradication operations.^{lxviii} As part of Operation Cooperation, it was determined that a Joint Working Group would be established to enhance cooperation between both countries and coordinate the training of Mexican personnel in the United States.

By 1972, the United States had become the largest importer of marijuana and heroin in the world, with Mexican brown heroin increasing significantly. The U.S. Drug Enforcement Administration (DEA) was established in June of 1973. In January 1974, the first group of DEA agents was deployed to Mexico.

Task Force Condor and the Birth of the Guadalajara Cartel

During the 1970's, most of U.S.-Mexico military cooperation centered on countering drug production in remote areas in Sinaloa, Guerrero, Chihuahua, and Durango. Exact statistics for CAN-ADOR are unknown, but, SEDENA announced that, between 1970 and 1976, it had destroyed 65,000 poppy plantations, 46,000 marijuana plantations, and had detained over 18,000 people that worked the fields.^{lxxix}

After assuming office in December 1976, President José López Portillo ordered the intensification of eradication operations in the *Triángulo Dorado*, at which point Plan CAN-ADOR ended and was replaced with Operation Condor. Spearheading Operation Condor was an Army Task Force that would increase interdiction operations in January 1977, leading to the mass migration of thousands of *Triángulo Dorado* inhabitants over the next few years. Thousands of peasants, including marijuana, and poppy growers sought refuge in larger cities on Pacific coast states, notably to Jalisco and Colima. Guadalajara, Mexico's second largest city, became the gathering point for marijuana and poppy growers that banded to better protect their crops, eventually leading to the creation of the Guadalajara cartel.^{lxxx}

Operation Condor's area of action moved beyond the *Triángulo Dorado* region with the Army and Air Force implementing interdiction operations at a national level, including amphibious operations close to Mexico's coasts.^{lxxxi} When Operation Condor ended in 1987, it recorded the destruction of 224,252 drug plantations and the detention of 2,119 people. Casualties of the operation included 27 civilians and 19 soldiers.^{lxxxii}

Chapter 5

Oil Boom and Military Modernization

Oil Abundance and Economic Instability

Mexico's oil boom in the 1970's led GDP to grow by a solid 9 percent between 1977 and 1981. The need to better protect Mexico's newfound oil wealth became a priority, leading to the largest re-organization since WWII.

The fourth edition of the National Defense Plan (DN-IV) concluded that Mexico faced new threats from either inferior or superior military forces that could threaten its oil installations, particularly those in the southeast. Furthermore, the emergence of communist insurgencies throughout Central America, most notably in Guatemala and El Salvador, was a cause of concern, and Mexico needed to have a strong enough military to deter a communist incursion into Mexico.

The response was a re-structuring that led to the creation of the I Army Corps (*I Cuerpo de Ejército*). The I Army Corps does not have an assigned territory and it is free to operate throughout Mexico.^{lxxiii} Initially, the I Army Corps was to be composed of three Army Divisions, but those units were re-defined and downsized after it became evident that the cost of standing up division-level forces was too high. Therefore, the Army created a new structure, the Independent Infantry Brigade, a brigade-level unit with above average logistics and support units.

Raising Conventional Capabilities

The Mexican Army was re-equipped with over 200 new Panhard armored vehicles from France and 80 light howitzers from Italy. Poor road infrastructure in southeastern Mexico (and Central America) meant that heavier equipment, such as the American M60 main battle tanks, would not be effective. In contrast, The Panhard 6x6 wheeled armored vehicles had been designed by the French for their rapid reaction forces in their colonies, mainly in Africa. Likewise, lightweight howitzers such as the Italian OTO Melara M56 could be disassembled and easily transported, therefore becoming the norm.

In order to further professionalize the officer corps, significantly more important than equipment modernization, SEDENA established a comprehensive meritocratic promotion system in 1982, which began to form the first generation of military officers that would be promoted via a standardized evaluation system.

On the combat aviation front, the FAM received its first and so far only squadron of Northrop F-5E/F Tiger II supersonic fighters. Initial plans called for up to three squadrons with 36 fighters, but this was later reduced to a single squadron. Alternatively, Mexico briefly sought to source 24 IAI Kfir fighters from Israel, but the U.S. sourced F-5's proved more attractive.^{lxxiv}

Yet, the cornerstone of the FAM's modernization was the procurement of up to 88 Pilatus PC-7 Turbo Trainer. As its name implies, the Swiss-built two-seat turboprop aircraft was designed primarily for training, but it could be armed for the light attack, close air support, and armed reconnaissance. PC-7's replaced the aging North American AT-6 Texan and T-28 Trojan armed trainers—both of which were 1940's and 1950's-era aircraft—in six tactical squadrons around the country. PC-7s had both counter-insurgency and counter-narcotics profiles, able to intercept slow and low-flying light aircraft in the latter role. The first of 88 Pilatus PC-7's begun to arrive in 1979 and ended in the early 1991, making Mexico the largest operator of the type.

Navy Joins the Counter Narcotics War

In 1976, Mexico adhered to the United Nations Convention of the Law of the Sea (UNCLOS), which established the 200 nautical miles Exclusive Economic Zone (EEZ), and officially extended patrol responsibilities over three million square kilometers. The Navy's involvement in counter-narcotics operations had been mostly limited to seizing a few cocaine shipments up to late 1970's.

After observing a very successful tuna fishing trawler, which used an embarked light helicopter to spot fish and an organic speedboat to catch fish off the Pacific Coast, the Mexican Navy benchmarked a new counter-smuggling interdiction doctrine which coined the *Trinomio* (Three-fold).^{lxxv} A Trinomio consists of a light corvette equipped with organic helicopter and interceptor crafts.

The Navy bought six *Halcon*-class patrol vessels built in Spain, along with six new MBB Bo-105 helicopters from Germany.^{lxxvi} This was the first time that a Mexican ship could operate a helicopter from its deck and was another first, as the Mexican Navy had traditionally been accustomed to hand-me-down 30-year-old ships transferred from the U.S. Navy or U.S. Coast Guard. Acquiring new-built vessels allowed the Navy to develop its own doctrine instead of adapting to foreign ones.

The Caribbean route became the focus of the operational attention, which deployed all of its *Halcon*-class ships as U.S. counterdrug efforts off Florida began to shift cocaine routes into Mexican waters.^{lxxvii}

By assuming this new counter-narcotics role, the Navy established a need for new operational requirements. The *Halcon*-class led to local construction of several new classes of Mexican ocean patrol vessels, which continued until mid-2010, launching and supporting an important naval shipbuilding capability. It also led to increase its international cooperation, particularly with the U.S. Coast Guard and U.S. Navy, which has continued to present day.

Chapter 6

Counter-Narcotics Becomes Dominant

The Kiki Camarena Effect

The kidnapping and murder of DEA agent Enrique ‘Kiki’ Camarena in February 1985 by the Guadalajara Cartel led to the arrest of its ringleaders, Ernesto Fonseca Carrillo and Rafael Caro Quintero. Fonseca Carrillo admitted to having amassed a USD 3.1 billion fortune and some 800 local, state, and federal police on its payroll.^{lxxviii} These revelations triggered an unprecedented reaction by the U.S. government, which stopped issuing visas in Mexico and significantly slowed down border crossings to pressure the Mexican government to clean up its law enforcement agencies.^{lxxix}

In 1986, the U.S. Government installed an annual certification process that sought to unilaterally qualify the performance and level of commitment of drug production and transit countries in their fight against drug trafficking. A lack of certification carried foreign assistance sanctions.^{lxxx} The certification process was not well received by the Mexican government and further strained U.S.-Mexico relations.^{lxxxi}

The Salinas Approach: Testing the Limits of Cooperation

The Carlos Salinas de Gortari administration’s (1988-1994) main goal was to significantly improve Mexico’s economy, for which he believed required a reform of the banking and commercial sectors, as well as establishing a free trade agreement with the United States.

The U.S. Government’s Anti-Drug Abuse Act of 1988 led to the creation of the White House Office of National Drug Control Policy (ONDCP) in 1989 and its director became known as the Drug Czar. This new position elevated U.S. counter-drug policy to the Presidential level. Upon assuming office in December 1988, Salinas de Gortari announced that the PGR (and not the military) would be the government’s lead counter-narcotics agency. A special counter-drug force had been created with 1,500 agents in 1988 and expanded to 1,834 by 1990.

The domestic security component was essential to complement Salinas’ economic reforms; therefore, Salinas determined that Mexico would need to be a cooperating partner with the U.S. War on Drugs.

The Salinas administration announced it would step up its air interdiction capabilities and instructed the FAM to establish a new air surveillance system in Mexico’s southeast. The new system was built around three Westinghouse AN/TPS-70 radars that had been established close to the borders with Guatemala and Belize during 1987 and 1988.^{lxxxii}

In January 1989, the FAM established the 10th Air Group which was to be equipped with Lockheed T-33 jet trainers obtained surplus from the U.S. Air Force. An initial 30 aircraft had been transferred to bolster FAM stocks. Their widespread availability saw the number

increased up to 40. The 210th Fighter Squadron began operations out of BAM 8 in Merida, Yucatan, and was joined by the 211th Fighter Squadron at BAM 6 Tuxtla Gutierrez and the 212th Fighter Squadron at BAM 2 Ixtepec, Oaxaca.^{lxxxiii} Of relevance is that the T-33 (T is for Trainer) lacked the fixed armament of the AT-33 (AT is for Armed Trainer) supplied in 1961 after the tension with Guatemala, and hence the T-33 would primarily be used as a pursuit aircraft.

While the FAM was entrusted with the southeastern border, the PGR created the Northern Border Response Force (NBRF). The first joint rapid response team was created in April 1990 to interdict illegal flights going into northern Mexico. The first unit was stationed in Monterrey, Nuevo Leon and the NBRF planned a further seven units.^{lxxxiv} The concept was for the United States to detect illegal flights via radar assets in international airspace and then communicate with Mexican forces so that they could track and interdict aircraft once in Mexico.

A U.S. Special Mission briefed President Salinas on US intentions to enhance interdiction in the Caribbean, Central America, and the Eastern Pacific and offered to provide helicopters and continue sharing information to Mexico on July 9, 1990. The mission also requested permission to overfly Mexican territory with Lockheed P-3 Orion surveillance aircraft so that they could improve detection of narcotic trafficking routes used to enter the United States. The U.S. plan was to have joint U.S.-Mexican aircrews for the P-3 Orions; the offer was rejected by President Salinas de Gortari. Salinas de Gortari replied on July 12, 1990 that the P-3 Orions would need to be handed over to the FAM if they were to operate over Mexico and that one or two U.S. observers would be allowed to participate as part of the crew. The Mexican government offered to lease one or several P-3 aircraft and announced it would have crews ready to be trained within 24 hours of acceptance. The rejection was a clear manifest that cooperation with the United States was still limited by sensitivities to Mexico's sovereignty.

As negotiations for the implementation of the North America Free Trade Agreement (NAFTA) had begun, President Salinas wanted to show that Mexico could be more than a business partner to the United States. In 1991, President Salinas announced that Mexico would consider providing troops for the U.S.-led coalition against Saddam Hussein.^{lxxxv} The announcement proved too progressive and out of tune for Mexico's inward looking political class. While Mexico backed the UN embargo on Iraq, it did not form part of the coalition against Saddam Hussein.

In January 1993, the Salinas administration announced it had initiated a new counter narcotics strategy under which it declined U.S. counternarcotic assistance and assumed responsibility for funding its own counternarcotic efforts.^{lxxxvi}

NAFTA and the Zapatista Uprising

On January 1, 1994 NAFTA came into effect, creating the largest free trade zone in the world. President Salinas' brainchild, NAFTA had been the subject of several years of negotiations to significantly bolster U.S.-Mexican economic trade. While NAFTA did not include a military component, the strengthening of commercial, economic, and trade ties between the United States and Mexico would undoubtedly lead to closer security cooperation.

It was therefore widely expected that on January 1, 1994 Mexico would make a large leap within the developing world. On the same day, armed groups from the *Ejército Zapatista de Liberación Nacional* (EZLN) took the towns of San Cristobal de las Casas, Ocosingo, Las Margaritas, and Altamirano, and began a complex low-intensity/high-media-visibility conflict. Amid national and international press, NGO's and internet-published Zapatista communiqués from deep in the *Lacandona* jungle, the Mexican Army undertook a very carefully planned counter-insurgency campaign. With an international media spotlight and globalized communications, the Mexican military faced its first modern conflict, which required a high dose of joint operations, communications outreach operations and the protection of human rights.^{lxxxvii}

As a result, joint task forces that included Army, Navy, and Air Force units were created: Task Force Arcoiris was created to cordon and contain the EZLN in Chiapas, which would be followed by Task Force Azteca, conceived in 1996 and Task Force Golfo Sur that would fight drug trafficking and provide protection for strategic energy-producing installations in Chiapas.^{lxxxviii}

Zedillo's Rapprochement to U.S. Assistance

Faced with a dire economic situation, the new administration of Ernesto Zedillo (1994-2000) proclaimed drug trafficking as the number one threat to Mexico's national security in late 1994. The Zedillo administration's strategy would require a multi-agency approach that initially began by creating and strengthening specific counter-narcotic institutions that somewhat mirrored the U.S. counter-narcotics approach, although the military remained tasked with destroying drug production and preventing the flow of drugs through Mexico.^{lxxxix}

As part of the institutional structural reforms, a DEA-type organization, the National Counter Narcotics Institute (*INCD-Instituto Nacional Contra las Drogas*) was created. Army General José de Jesús Gutiérrez Rebollo was appointed the INCD first director on December 9, 1996. General Gutiérrez Rebollo had been in charge of fighting the Guadalajara and Sinaloa cartels between 1989 and 1996, and had been quite successful, including the capture of Sinaloa cartel leader Héctor *El Güero* Palma Salazar. General

Gutiérrez Rebollo would be known as Mexico's first Drug Czar, mirroring U.S. Army Retired General Barry McCaffrey, who at the time was the director of the Office of the National Drug Control Policy (ONDCP). After meeting Gutiérrez Rebollo, McCaffrey praised the Mexican effort citing him as a hard-nosed field commander of the "highest integrity" who clearly was committed to cooperating with the United States.^{xc}

Gutiérrez Rebollo's service as the INCD's director, however, was short lived. Some 72 days after being appointed to head the INCD, Rebollo was arrested and charged for working for the Juarez cartel. Rebollo was sentenced to 40 years in prison, where he died in December 2013. This type of high-level corruption helped to bolster the opinion of many in the US that they could not trust their partners south of the border.

SEDENA set up the Counter-Narcotics Intelligence Center (*CIAN-Centro de Inteligencia Anti-Narcóticos*) in 1996,^{xc} which reported directly to the Office of the Secretary of National Defense. The CIAN was extremely stovepiped, and divided into modules to analyze each cartel individually.^{xcii} Despite the existence of multiple intelligence agencies in a broader national security structure, military intelligence was not shared with civilian intelligence.^{xciii}

The Zedillo administration approached the United States to request assistance to bolster the military's counternarcotic capabilities. The United States responded immediately: Secretary of Defense William Perry visited Mexico in October 1995. Perry's trip was the first visit by a U.S. Secretary of Defense to Mexico and he offered to assist in force. Specifically, Perry offered to transfer helicopters, surveillance aircraft and provide counternarcotic training.

The United States offered to transfer 73 Bell UH-1H Iroquois (Huey's) helicopters from the U.S. Army which were being retired as a drawdown measure, and four Fairchild C-26A Metro aircraft retired prematurely from the USAF. The United States would also provide specialized counterdrug, helicopter maintenance, riverine operations, intelligence, and reconnaissance training for 1,500 Mexican personnel.^{xciv}

In addition, the Mexican Navy procured two Knox-class frigates from the U.S. Navy that were offered at a discounted price. The frigates were delivered in 1997 and were followed by two ships a few years later. U.S. assistance, therefore, amounted to increase air mobility surveillance over land, air, and sea.

The Huey Fiasco

The large Huey fleet was to form the airmobile component of the new Airmobile Special Forces Groups (GAFE), being established with a specific counter narcotics role. The 73-strong fleet would be spread to 10 bases and would significantly bolster the Army's air mobility, reconnaissance, and close air support capabilities. Given the Huey's number

and advanced age, a USD 8 million spares support package was also provided. The first 20 UH-1H helicopters arrived in November 1996, the second batch in July 28, 1997 and the third batch in September 25, 1997.^{xcv} The Hueys were used to create six squadrons each with twelve helicopters and deployed to BAM-3 at El Cipres, BAM-5 in Zapopan, BAM-10 in Culiacan, BAM-13 in Chihuahua, BAM-14 in Monterrey, and BAM-18 in Hermosillo.^{xcvi}

The initial report on the Huey's operations was very successful: 1997 DOD statistics recorded the Huey fleet had flown 8,300 hours, located 40,000 marijuana plants, 500 clandestine runways, and 20 drug producing facilities leading to the seizure of 400 kilos of cocaine and 5 tons of marijuana.

One public relations challenge emerged: with the Zapatista's rebellion still warm and fearing negative international criticism, the Huey fleet was only to be used for its intended counter-narcotic purpose. The Huey fleet was therefore provided with *strings attached*, that is, with an End Use Monitoring (EUM) agreement through which the FAM had to supply bi-monthly reports of its use and allow quarterly on-site inspections by U.S. military and State Department officials. The helicopters were specifically banned from operating in Chiapas and Guerrero, where their use could be interpreted as assisting counter insurgency operations.^{xcvii} However, the problem was that the FAM operated its own Bell 205A-1 (commercial version of the UH-1H) and the twin-engine version of the Huey, the Bell 212 *Twin Huey*, which could not be restricted from operating anywhere in Mexico.

By 1998, reports from the Mexican and U.S. governments began to evidence the Huey's shortcomings. The Mexican Foreign Ministry (SRE) reported that only 31 helicopters were operational performing recon and transport operations and were flown between 16 and 25 hours per month.^{xcviii} Testimony provided by Benjamin F. Nelson, the State Department's Director of International Relations and Trade Issues to the US Congress in 1998 further explained:

The U.S. embassy has reported that the UH-1H helicopters provided to Mexico to improve the interdiction capability of Mexican army units are of little utility above 5,000 feet, where significant drug-related activities, including opium poppy cultivation, are occurring. The average operational rates for the UH-1H helicopters have remained relatively low, averaging between 35 and 54 percent, because of inadequate logistics support such as delays in the delivery of spare parts.^{xcix}

Nelson's testimony additionally slammed the procurement of the C-26A Metros and Knox-class frigates:

The four C-26 aircraft were provided to Mexico without the capability to perform the intended surveillance mission. Five embassy officials stated that the Mexican military has not decided how many of the aircraft will be modified to perform the

surveillance mission, but modifying each aircraft selected for surveillance will cost at least \$3 million.^c

Regarding the two Knox-class frigates, when they were delivered in August 1997, the ships lacked the equipment needed to ensure the safety of the crew, thus rendering the ships inoperable. The U.S. Navy estimated that it will cost the Mexican Navy about \$400,000 to procure this equipment and that it will be at least 2 years before the ships will be operational. Even though the U.S. Navy knew that the ships would not be operational when they were delivered, DOD began providing the Mexican Navy with about \$1.3 million worth of training to 110 personnel related to the two Knox-class frigates. U.S. embassy officials stated that this training will be completed in March 1998. The Mexican Navy will reassign these personnel until the ships can be used. According to DOD officials, they approved the training because they were not informed by the U.S. Navy that the ships would not be operational.^{ci}

Logistical problems plagued the Huey fleet, mainly as the 2-year spares supply was consumed within 9 months, and one helicopter crashed in December 1997 killing two Mexican military personnel. In March 1998, the U.S. DOD ordered a grounding of its entire UH-1H fleet due to engine cracks, and the FAM followed suit. After several considerations, including the possible upgrade of the fleet to the Huey II configuration at a cost of USD 1.4 million per aircraft,^{cii} the remaining 72 UH-1H helicopters were loaded on trucks and returned to the U.S. in mid-1999.^{ciii}

Not all second-hand transfers proved to be as bitter. In sharp contrast, the C-26A Metro aircraft was a very efficient addition to the FAM, specifically once upgraded and used to detect and track illegal flights.

In 1999 and 2000, the Mexican Navy also placed a request for a further two Knox-class frigates to complement the two obtained in 1996 as well as two Newport-class tank landing ships (LST). The USS *Pharris* and USS *Whipple* frigates were delivered in September 2000 and 2002 respectively, and joined by the USS Newport and USS Frederick LST's.^{civ} These six ships would form the bulk of the surface fleet's ocean water capabilities at least over the next 20 years.

Enhancing Air and Sea Interdiction: The Birth of SIVA

As part of an interdiction ramp-up, President Zedillo ordered that the FAM intercept illegal and track flights performing drug smuggling operations. However, Mexico did not adopt a shoot-down law. Thus, FAM aircraft were only able to intercept and either *intimidate* illegal flights into landing or track them and coordinate with land-based assets to intercept them once they had landed. The results were poor and it was evident that

the FAM would have to develop a modern airspace surveillance system in order to provide advanced warning for illegal incursions into Mexico's airspace.

In October 1998, representatives from Mexico's Ministry of Interior (SEGOB), the National Security Research Center (CISEN), and the Special Affairs Office of the Mexican Embassy in Washington D.C. presented SEDENA with a project for the establishment of an airspace surveillance network to strengthen the government's illegal flight control strategy.^{cv} The stated air surveillance network's mission was specifically to counter the trafficking of illegal substances, drugs, psychotropic, chemical precursors, weapons, munitions, and explosives. A secondary role was to provide air surveillance for Mexico's strategic infrastructures from terrorist attacks.^{cvi}

SEDENA began to study existing air surveillance systems being fielded around the world and found that Brazil's Amazon Integrated Surveillance System (SIVAM) was a good benchmark. The initial planning of SIVA therefore took into consideration experiences and procedures undertaken by SIVAM.

The Integrated Air Surveillance System (SIVA) was originally structured into five key components:

- Detection and Control: included the land-based radars deployed on Mexico's southeastern border with Guatemala and Belize.
- Airborne: included a variety of surveillance platforms on aircraft.
- Interception: aircraft, helicopters and land troops.
- Command: composed of a Command and Control Center (CMC) that integrated data from three fixed radar sites, and mobile components to coordinate a response to airspace intrusions.
- Communications: enabling the CMC to link with the detection and control, and reaction components.

The original requirement for the aviation element called for three airborne early warning and control (AEW&C) aircraft, six maritime patrol and 25 light fighters. Noting the clear SIVAM influence, an initial phase led to the USD 240 million order of one Brazilian Embraer EMB-145AEW&C and two EMB-145MP maritime patrol aircraft in 2001.^{cvi}

Further funding was not made possible and the FAM sought to complement its ISR fleet with existing aircraft. The U.S. Government (USG) offered to modify the four Fairchild C-26A Metro transports it had donated in 1997 for the ISR role, converting them into RC-26A versions equipped with an AN/APS-143B (V)3 Ocean Eye maritime surveillance radar and a FLIR Systems Star Safire II Forward Looking Infra-Red (FLIR) system.^{cvi} The upgraded C-26 aircraft would prove very effective and a 2002 USG report outlined the aircraft was found to be in a good physical condition, although the FAM lacked the resources to

adequately maintain it.^{cxix} SIVA became operational in December 2004, reporting directly to the SEDENA Chief of Staff.^{cx}

SEMAR would also seek to increase its interdiction capabilities and in 1999 the Navy announced plans, also motivated by SEGOB, to increase its interceptor craft fleet by procuring 40 Swedish-designed Combat Boat 90, which it named Polaris. The 18-ton Polaris-class had a speed of up to 45 knots, making it a very efficient interceptor.^{cx}

A New Fighter in the Ring: The Federal Preventative Police

As criticism over the continued use of the military in counter narcotic operations grew, the administration of President Zedillo created the Federal Preventive Police (PFP).

The new federal police initially fused an odd mix of the existing Highway Police, Fiscal Police and Migration Police forces but was soon found to require additional personnel. Transferring the 3rd Military Police Brigade comprising of 5,000 troops from SEDENA and 2,000 marines from SEMAR solved the personnel problem, at least on paper. However, in real life, it created what was described as a *Frankenstein police force* by then Senator Adolfo Aguilar Zinser due to the heterogeneous experience and capabilities of its components.^{cxii}

The administration of Vicente Fox (2000-2006) would seek to further divorce public security functions from the political governance and stability-tasked SEGOB, and created a cabinet-level ministry known as the Ministry of Public Security (SSP) to administer the PFP.

Chapter 7

Democracy and the War on Crime

Fox's Challenges: 9/11, Iraq and NORTHCOM

The constitutional reforms of 1997 led to the advent of electoral democracy and the downfall of the PRI. Vicente Fox Quesada from the right-wing National Action Party (PAN) was elected as the first non-PRI president of modern Mexico in 2000. The armed forces transferred their loyalty from one administration to another without significant challenges, proving they had developed a high degree of professionalism and that loyalty depended on institutions and not on political parties.^{cxiii} Expectations for a thorough institutional reform of the State—including the campaign promise to create a new national security structure—were very high.^{cxiv}

The deep changes appeared imminent, as Mexico took a seat as a non-permanent member of the UN Security Council in January 2001. There was wide expectation that a deep defense-sector reform would lead to the creation of a civilian-staffed Defense Secretary, as well as participation in international peacekeeping operations. The new external role, it was thought, would help shape the 21st Century Mexican military thinking, shifting from an internal focus to an international perspective.

As to U.S.-Mexico relations, the *business-sector-friendly* Fox sought to build a very strong bilateral relationship, and began to negotiate a comprehensive immigration reform that would allow thousands of Mexican workers to obtain temporary worker status in the United States. On September 7, 2001, the relationship faced tensions, as Mexico announced it would revise its adherence to the Inter-American Treaty of Reciprocal Assistance (1947), aka the Rio Treaty. While many analysts considered the Rio Treaty as a Cold War relic, since it basically sought to align Latin American countries with US interests in case of an attack from the Soviet Union, the announcement was a direct blow to the U.S.-Mexico relationship. At the time, the Rio Treaty was the only international defense treaty to which Mexico was a signatory party.^{cxv}

The terrorist attacks on September 11, 2001 and the resulting push in its aftermath to secure U.S. borders further complicated the bilateral relationship, leading to the collapse of the temporary worker status negotiations. Still bound by a strong non-interventionist foreign policy, from its seat in the UN Security Council, Mexico opposed the U.S. intervention of Iraq further distancing itself from the United States. On top of the growing distance, Mexico pulled out of the Rio Treaty in September 2002.^{cxvi}

While Mexico refused to support the U.S. position towards Iraq in the UN Security Council, it did cooperate fully on bilateral security issues. With the creation of the U.S. Northern Command (NORTHCOM) in 2002, it became clear that once again, Mexican security cooperation would be vital to U.S. National Security. U.S. military thinking expanded what it considered its priority defense perimeter from the traditional Cold War-era, U.S.-Canada region to now include Mexico. In turn, terrorism was re-prioritized in the list of Mexican national security threats.

The main identified terrorist threat for Mexico was a potential attack against critical energy-producing infrastructure. To counter the threat perception, SEMAR sought to stand up new rapid reaction force that would include three airborne early warning aircraft, eight armed jet trainers and two missile-armed corvettes. Israel sold and delivered the two Aliya-class corvettes and three Grumman E-2C Hawkeye AEW, however the Czech-built, but Israeli-upgraded Aero L-39ZA armed jet trainers were not procured.^{cxvii} Confirming the need to protect its offshore oil installations from a possible terrorist attack, in December 2005 the Mexican Government announced that PEMEX would fund five Raytheon AN/TPQ-64 Sentinel tactical air surveillance radars, which would be operated by SEMAR to protect the Campeche sound.^{cxviii}

Since 2006, the SEMAR air defense requirement evolved, and after considering the Swedish JAS-39 Gripen fighter jet, SEMAR announced it would procure five Russian-built Sukhoi Su-27SKM and a Su-30MK2 fighters.^{cxix} There was no explanation provided as to why SEMAR would seek a fourth generation fighter from Russia other than it sought to establish air superiority over the Caribbean. Selecting a Russian fighter, however, would lead to friction with the US. In early 2007, the new SEMAR administration announced that the Russian jets were no longer being considered.^{cxx}

Institutionalizing North American Security

Cooperation between SEMAR and the U.S. Navy began to increase in 2002, when a Mexican frigate was deployed to take part in the U.S. sponsored UNITAS 43 exercise off the coast of Colombia. The frigate was deployed through a presidential order and lacked the consent of Mexico's Senate, which was required by Article 76 of the Mexican Constitution.^{cxxi}

In 2003, military to military relations began to increase steadily beyond training mechanisms and in May, as a prelude for increased cooperation, both countries signed an agreement through which their respective military personnel and their dependents are able to receive healthcare coverage from military institutions while commissioned in the other country. This is an important benefit for both countries, as it solves logistical problems and opens the door for further cooperation. Furthermore, Mexico voted in favor of UN Resolution 1511 that called for a longer-term multi-national presence in Iraq on 16 October 2003.^{cxii} The healthcare agreement was followed in January 2004 by the Agreement regarding exchange of naval personnel and in September 2004 by the Agreement for the assignment of liaison officers.^{cxiii}

Canada, Mexico and the United States signed the Security and Prosperity Partnership (SPP) on March 23, 2005. In Spanish, SPP was named the *Alliance* for Security and Prosperity in North America (ASPAN), striking the deep semantic difference between a partnership and alliance. The agreement sought to create intelligent and secure borders, promote common economic development and align security agendas for North America.

SPP laid the basis for the three nations signing the North American Maritime Security Initiative (NAMSI), which outlined the need to strengthen the exchange of information and cooperation matters of maritime safety and security.^{cxxiv}

Calderón Declares War on Crime

Newly elected President Felipe Calderón (2006-2012) assumed power on December 1, 2006 and declared an all-out war against organized crime twelve days later, with the deployment of 5,000 troops to his home state: Michoacán.^{cxxv} Calderón came into power after a heavily contested electoral process in which he won by a close margin, counting 35.89 percent of the votes versus 35.33 percent obtained by his closest rival from the left-wing PRD party.^{cxxvi}

The lack of a more robust electoral process, such as the provision of a second round, led the close margin victory to be challenged by the PRD and devolved into a post electoral political crisis. Calderón's decision to declare war on organized crime was therefore interpreted by many analysts as a need for political legitimacy. Despite the political interpretation, there was a genuine need for the new government to act, as it had become clear that organized crime threatened and in some cases undermined the authority of the State. Analysts and policy makers in the United States widely debated the nature of the criminal threat, with some characterizing it as a form of insurgency.^{cxxvii}

Mexico's law enforcement forces at the time were made up of some 338,000 police, of which about 40 percent were atomized into over 1,500 different municipal police departments tasked with reacting to small-time crime, felonies, and traffic misdemeanors; 45 percent were state police tasked with a purely preventive mandate and roughly 8 percent were investigative police distributed into 32 state-level attorney general's offices.^{cxxviii} Federal law enforcement made up the remaining balance and these were divided between the relatively new PFP which numbered some 6,000—of which about a third were in charge of patrolling federal highways- and the even younger Federal Investigations Agency (AFI).^{cxxix}

The Calderón administration realized very early on that it would require two key tools: the use of the armed forces at an unprecedented level and a significant ramp up of assistance from the United States.

The military would be employed as a constabulary force under the 2007 Counter Narcotics Integral Directive (*Directiva Integral para el Combate al Narcotráfico*). The armed forces were ordered to deploy to Michoacán, Calderón's home state, which was widely perceived as the epicenter of recent violence due to the emergence of a criminal organization known as La Familia.^{cxxx} The Michoacán operation would be followed by similar large-scale deployments under operations *Baja California* to Tijuana, *Chihuahua*

to Ciudad Juarez, *Frontera Sur* (Southern Border) to the Tehuantepec Isthmus, *Sinaloa* to Culiacan and Navolato, Operation Northeast to Nuevo Leon, Tamaulipas and Coahuila, and operations Guerrero Seguro, and Veracruz Seguro.^{cxxxix} These were joint operations that included Army, Marines, and Federal Police as well as supporting units from a variety of federal agencies, plus limited, at times symbolic contributions from state and municipal law enforcement agencies.

The need to rely on the armed forces came from the lack of control and trust over state police and even some federal law enforcement agencies. On December 4, 2006 SEDENA was ordered to take over the aerial eradication activities of the PGR. Therefore the FAM absorbed the PGR's fleet of 50 Bell 206 aerial spraying helicopters, eight Cessna 206 surveillance aircraft, 74 vehicles, and ten operational bases.^{cxxxix}

SEDENA planners sought to create a special force, large enough to conduct counter-cartel operations at a national level. The 10,000-strong Federal Support Forces Corps, which would be placed under direct command of President Calderón, was created through a decree in May 2007,^{cxxxix} but failed to gain the required congressional support and was deactivated in December 2007.^{cxxxix}

During the next few years of the Calderón administration, the U.S. and Mexican military relationship would reach levels of cooperation not seen since WWII.

Increasing Air Interdiction, Again

As part of the *Directiva Integral para el Combate al Narcotráfico*, SEDENA launched a project to modernize SIVA's detection capabilities. SIVA data showed that while the airborne radars were effective, the land-based radars were significantly outdated. A 2007 SEDENA document outlines that the detection and tracking capabilities of the three Westinghouse land-based radars, which had been in use since January 1989, were significantly degraded. The document states that the radars were only functioning in secondary mode, therefore able to provide data for air traffic controllers but ineffective to detect low flying flights.^{cxxxix}

Even with obsolete radars, SIVA was able to establish a virtual fence on Mexico's southeast border: in 2007 SIVA statistics state it detected and tracked 40 illegal flights, 10 of which penetrated Mexican airspace (25 percent), 13 landed in Guatemala (32 percent), twelve in Honduras (30 percent), two in Belize (5 percent), and one in El Salvador.

In 2008, SIVA detected 65 illegal flights, of which five penetrated Mexican airspace (7 percent), 24 landed in Guatemala (36 percent) and 23 in Honduras (35 percent). No further incursions into Mexican airspace were detected since 2009.^{cxxxix} Guatemala lacked radars and the ability to intercept illegal flights. Negotiations that began in 2007 to buy new radars, an integrated command, control, communications and intelligence center

(C4I) from Spain and a squadron of EMBRAER Super Tucano light fighters through a Brazilian National Development Bank (BNDES) credit, stalled.

From 2009 to 2010 the illegal flight traces began to shift from landing in Guatemala to landing in Honduras: SIVA detected 113 illegal flights, of which 18 landed in Guatemala (16 percent) and 58 in Honduras (51 percent) during 2009, and 100 illegal flights in 2010, of which 6 landed in Guatemala and 74 in Honduras. The shift in flights to Honduras and away from Guatemalan airspace was likely the result of an unwritten arrangement between the Guatemalan and Mexican governments that allowed Mexican surveillance aircraft to patrol Guatemalan airspace.^{cxxxvii} In 2011, 102 of 114 illegal flights detected by SIVA landed in Honduras.^{cxxxviii}

A program to replace the ageing Westinghouse radars with four new 3-D long-range radars launched in 2007 had stalled.^{cxxxix} The U.S. Government offered to provide assistance for the repair and upgrade of the southeast-looking radar sites and in December 2009 offered to lend one of its Northrop Grumman AN/TPS-78 mobile radars, although there is no record of its delivery. After considering several types of radars, the FAM selected the AN/TPS-78 and placed a USD 118 million order in 2010. Selection of the U.S.-built radars was influenced by the growing U.S.-Mexican defense and security relationship and the radars began to be delivered in 2011.

Marines in the Limelight

SEMAR implemented an institutional re-structuring that led to the creation of the Naval Intelligence Unit and a 32 battalion-strong marine infantry force in 2007.^{cxli} The Marines first came into the media spotlight in December 2009 after a special operation that led to the elimination of cartel leader Arturo Beltrán Leyva in Cuernavaca, Morelos.^{cxli} From then on, the Marines would own the media spotlight.

The main difference in the military's counter-cartel role during the Calderón administration was that it focused operations in urban centers, as the Army and the Marines were used as the main reaction force to stabilize large regions where crime and violence had spiraled out of control.

The temporary replacement of entire municipal police forces with military units and the multiplication of military checkpoints in and around cities and major highways led to unprecedented contact with the civilian population. That increased contact was not well received by some sectors of Mexican society, especially as the fog of war unavoidably led to collateral casualties, particularly in urban centers, leading to widespread concerns on human right violations.

Merida and its Military Component

U.S. cooperation was channeled through a regional security assistance program known as the Merida Initiative, which began to fund assistance to Mexico from FY 2008. The Merida Initiative initially included U.S. cooperation for Central America but this was later divorced and re-engineered from FY2010 as a separate program known as the Central America Regional Security Initiative (CARSI).^{cxlii}

The Merida Initiative became a multi-year proposal to provide equipment and training to support law enforcement operations and technical assistance for long-term reform and oversight of security agencies.^{cxliii} Within this cooperation, SEDENA and SEMAR were identified as principal actors involved in the interdiction operations.

As design of the Merida Initiative took shape, it initially appeared to be an *equipment-heavy* military assistance program, however, this soon proved to be but the first phase of the Merida Initiative, which has since taken a much more diversified approach as part of the USD 2.3 billion funded between FY 2008 and FY2015.^{cxliv} To avoid past blunders, all equipment provided under the Merida Initiative was newly-built and in accordance to Mexican specifications.

The FAM began to receive eight Bell 412EP multi-role helicopters in November 2009 that would complement four identical helicopters procured by the FAM since 2002. A ninth Bell 412 was delivered in December 2012 as one of the Merida helicopters (serial No. 1208) crashed in Durango during a ferry operation at night, killing 11 onboard on June 18, 2010.^{cxlv} Unlike the 1998 Huey accident, the tragedy did not lead to political fallout.

In February 2007, SEMAR announced it would drop previous plans to procure Sukhoi Su-27 Flanker jet fighters from Russia and would instead seek a fleet of maritime patrol aircraft.^{cxlvi} SEMAR selected the Spanish-built CASA CN235-300MP Persuader similar to the one adopted by the U.S. Coast Guard as its standard Medium range Surveillance Aircraft back in FY2002 and named the HC-144A Ocean Sentry.^{cxlvii} While based on the same Spanish CN235-300MP aircraft, both versions differ in their mission package, and this difference led to a brief delay in the implementation of the program. SEMAR had selected the factory option for maritime patrol suite while the USCG included a special Mission Systems Pallet. Eventually, SEMAR procured two CN235-300MP with its own funds, and the Merida Initiative provided a further four, which were delivered between November 2011 and June 2012. SEMAR has since announced it will fund procurement of a further four Persuaders. Although Spanish-built, all of these aircraft have a heavy dose of U.S. content, with its avionics, engines, and surveillance equipment requiring U.S. export control.

The third type of military aircraft supplied through the Merida Initiative was the Sikorsky UH-60M Black Hawk helicopter. The Federal Police took delivery of six of these helicopters between November 2010 and August 2013, which added to the existing fleet of six UH-60L versions procured earlier by the Federal Police using its own funds. Likewise, the Mexican Navy received three UH-60M Black Hawks in August 2011, which were immediately employed in special operations against cartels in Mexico's northeast. Since then, SEMAR has placed orders on at least a further eight UH-60M's worth an announced USD 325 million using its own funding. Furthermore, SEDENA has also selected the UH-60M and placed an order for 18 helicopters to begin replacement of its Russian Helicopters Mi-17 fleet. The SEDENA FMS deal has been announced at USD 680 million, to be paid for with its own funds.^{cxlviii}

Equipment supplied via the Merida Initiative has therefore either been used to complement existing similar types in inventory or has led to further significant orders from U.S. manufacturers via the USG's Foreign Military Sales program.

Chapter 8

Towards a Networked Relationship

Building Trust: Information and Intelligence Sharing

Beyond equipment transfers, the Merida Initiative launched a new era in information and intelligence sharing between the two countries. SEMAR established a foreign liaison officer (LNO) at NORTHCOM in 2007, which led to enhanced communications and coordination on training, planning and operations.^{cxlix} As part of the increased relationship, SEMAR signed a General Security of Military Information Agreement (GSoMIA) with DOD in September 2008 that led to institutionalizing military intelligence and information sharing.^{cl} Besides the interaction with NORTHCOM, SEMAR had also established a working relationship with U.S. Southern Command (SOUTHCOM), which has its area of responsibility in Central and South America. Cooperation with the Joint Inter-Agency Task Force-South (JIATF), located in Key West, has been instrumental, as this task force runs the hemispheric satellite surveillance system. Gaining access to this type of intelligence has allowed the Mexican naval fleet to increase effectiveness of its interdiction operations.^{cli}

Increased contact also led to the launch of Mexican Navy participation in large-scale U.S.-sponsored naval exercises, beginning with a return to the multi-national UNITAS 50 in 2009.^{clii} This time around, Mexico's Senate approved SEMAR's participation before the deployment and since then, Mexican ships have increasingly participated in multiple U.S. sponsored multi-national exercises.

Since 2009, U.S. outreach has intensified, with a series of confidence building measures being implemented, including SEDENA and SEMAR senior officer visits to multiple NORTHCOM organizations, including:

- U.S. Army North (ARNORTH) (aka Fifth Army) which provides the U.S. Army component to NORTHCOM providing homeland defense,^{cliii}
- Joint Task Force North located at Fort Bliss, Texas, which is subordinate to NORTHCOM and tasked with supporting Law Enforcement Agencies in the conduct of counter-narcotics and counter narco-terrorist operations;^{cliv}
- Air Forces Northern (AFNORTH) located at Tyndall AFB, Florida. Aka First Air Force comprises nine wings including six fighter wings equipped with F-22 Raptor, F-15 Eagle, and F-16 Fighting Falcon combat aircraft that are tasked to provide air superiority over North America.^{clv}

Besides these high-level courting, in June 2009, the White House' Office of National Drug Control Policy published the 2009 National Southwest Border Counternarcotic Strategy, which contained -for the first time in history- a chapter of combating illicit arms trafficking into Mexico.^{clvi} The Army and Air Force engagements were clearly courting SEDENA, which responded in kind, and established an LNO at NORTHCOM in August 2009.^{clvii}

The increased contact led to the creation of new mechanisms, such as the Border Contact Meetings (BCM) that have brought Mexican military commanders on the border to maintain routine periodic contact with U.S. military and law enforcement counterparts^{clviii} and a similar GSoMIA signed with SEDENA in March 2010.^{clix}

Furthermore, by institutionalizing the bilateral security relationship, cooperation began to move more swiftly from eventual operations to a day-to-day bilateral activity.

Closing the Northern Gap

SIVA managed to effectively control the southeastern border, as well as allow SEDENA and law enforcement agencies to detect and destroy 3,080 illegal landing strips in 2007-2012.^{clx} In sharp contrast, Mexico's northwest border presented very low air interdiction success rates, outlining the FAM's lack of surveillance and interception capability.

The SIVA itinerant capability began to be employed from December 2006, when a SIVA flight equipped with *Embraer* surveillance aircraft was deployed to the BAM-18 air force base in Hermosillo, Sonora. The unit's mission was to detect domestic illegal flights that usually originated in the *Triángulo Dorado* (Golden Triangle) area, the largest marijuana and poppy producing region on the borders of Sinaloa, Chihuahua, and Durango. The flights presumably transported drugs to Mexico's northern border or into the United States.

In December 2006, the SIVA flight detected 18 illegal flights but did not report any intercepts. During 2007, the SIVA flight detected 187 illegal flights, allowing the Army and federal law enforcement were able to interdict 14 (7 percent); these numbers increased to 220 detections with 34 successful interdictions (15 percent) in 2008, but in 2009 rose to 268 detections with only 17 successful interdictions (6 percent).

Since 2009, the SIVA flight began to detect the use of ultra-light aircraft to transport drugs into the United States, spotting two flights. Detection in 2010 went up to 282 illegal flights of which 55 were performed by ultra-lights, with successful interdictions of all types of flights numbering 19 (6 percent). In 2011, the number of illegal flights detected in that sector decreased to 166 including 65 ultra-lights.^{clxi}

As part of the confidence building measures, in June 2009, the United States announced it would be in a position to facilitate the radar signal generated by the Joint Surveillance System (JSS), which is composed of land-based long-range radar sites located on the perimeter of the United States,^{clxii} as well as to the then USAF-managed Tethered Aerostat Radar System (TARS), a network of eight helium blimps equipped with airborne radars and meant to provide low-level radar surveillance.^{clxiii}

The TARS signal was made available via the Air and Marine Operations Surveillance System (AMOSS) operated by the U.S. Department of Homeland Security's Air and Marine Operations Center (AMOC) at March Air Reserve Base in Riverside, California.^{clxiv} However, tracking and classifying a flight as illegal took up to 20 minutes, while transferring the signal to SIVA took an additional 5 minutes, resulting in a 25 minute delay for Mexican air and ground forces to react, resulting in poor results and frustration.^{clxv} This northern gap led to the launch of a SEDENA program to establish a network of radars to provide coverage on Mexico's northern border.

The administration of President Enrique Peña Nieto (2012-2018) announced, as part of the 2013-2018 National Defense Sector Program, the intention to increase airspace surveillance coverage from 32 percent to 72 percent by 2018.^{clxvi} The northern-looking SIVA will comprise up to five long-range radars, for which the Thales Raytheon Systems GM400 Ground Master was announced as the preferred option in July 2015.^{clxvii} The ground radars will be completed by a new command and control center, plus airmobile surveillance assets to include a new AEW&C, three new UAV's and three additional ISR aircraft.^{clxviii}

The new program is significant as it seeks to create a non-existing capability to monitor and eventually control Mexico's northern-border airspace. This is the sort of tool that will make Mexico a more pro-active and capable player in North America's continental defense.

Narrative Shift

The administration of Enrique Peña Nieto began with a sharp shift in Mexico's narrative, changing the focus of government efforts from security to the profound economic reforms needed to substantially improve Mexico's international competitiveness. Despite the focus of the change in narrative, security remained the priority as signaled by the first chapter of the 2013-2018 National Development Plan entitled *Mexico in Peace*. Security operations took a back seat in the media spotlight, yet remained active and in many respects continued his predecessor's cartel decapitation strategy. The cherry on top of the Peña Nieto administration's security strategy was the capture of the Sinaloa cartel leader Joaquín Guzmán Loera aka El Chapo (Shorty).

Several changes were to be implemented, including:

- Restructuring of the former SSP to be absorbed by SEGOB and be converted into the National Commission for Security (Comisión Nacional de Seguridad, CNS);
- Creation of a National Gendarmerie under civilian control, which would initially be composed of 10,000 troops; relocate 7,500 elite personnel from SEDENA and

- 2,500 from SEMAR; and expected to grow to 40,000 by 2018 at which point it would take over the military's law enforcement support role;
- Streamline all international programs to a single point of contact under SEGOB, which would be designated the *Ventanilla Única* (Single Window) for security cooperation.

The SSP transformed into the CNS, mainly by eliminating the cabinet level position of secretary of public security and replacing it with a new National Commissioner for Security subordinated to SEGOB. The former SSP bureaucracy became that of the new CNS. While this did not alter everyday operations, subordination to SEGOB decreased the former cabinet level SSP position's power.

Creation of a National Gendarmerie proved a much harder task than originally planned. The initial idea was re-designed by CNS out of pressure from civil society organizations, which viewed a military-manned Gendarmerie as a step further towards militarization, rather than a new police model.^{clxix} The Gendarmerie was eventually redesigned and organized as a new division of the Federal Police and its initial manpower was halved to 5,000. The original idea for the Gendarmerie to have its own aviation and intelligence support units, separate from the Federal Police also had to be cut back.^{clxx} The Gendarmerie began operations in August 2014 with a USD 330 million budget that was cut by 25 percent for 2015 and the trend continued in 2016, with the Gendarmerie not expected to grow any further.

Security cooperation mechanisms in place, which had allowed for direct contact between U.S. and Mexican security agencies under the Calderón administration, were restricted to the *Ventanilla Única*.^{clxxi} The change only impacted the civilian security agencies, as the recently institutionalized bilateral relationship between the U.S. and Mexican militaries remained relatively unchanged.

Investing in the Future: Military Modernization

Under Peña Nieto, the Mexican military has launched the most thorough military modernization and recapitalization program, since the oil boom in the 1980's. The modernization program includes new equipment to replace legacy systems in its air, land and sea forces; a reform to the military education systems; the creation of new capabilities to operate in the cyberspace and space sectors; as well as the definition of a joint defense plan and a national defense policy.

Despite its traditional nationalistic doctrine, the modern Mexican military is pragmatic and since 2013 it has selected mostly U.S. or at least NATO-compatible systems to fulfill most of its requirements. This has led to Beechcraft T-6C+ Texan II tactical support aircraft and Sikorsky UH-60M Black Hawk medium helicopters^{clxxii} to replace ageing Swiss Pilatus

PC-7 and Finish Valmet L-90TP armed aircraft as well as Russian Mi-17 helicopters in both SEDENA and SEMAR. Mexico has also requested NATO observer status that will likely lead to further professionalization of the armed forces. Other legacy U.S. systems such as the Bell 206 and 212 helicopters and HMMWV (Humvees) are being replaced by the following generations of similar systems, including the Bell 407 and 412, as well as new generation HMMWV's^{clxxiii} respectively. Overall, the Mexican Government launched equipment procurement plans worth MXN 134 billion (USD7.7 billion) from December 2012 to December 2015.^{clxxiv}

As to the military education sector reform, the budget allocated to the military education system has increased by 45%, from 1,568 million pesos in 2012 to 2,281 million in 2016.^{clxxv} This increase has allowed deep structural reforms that have an impact on the development of its members. The effects will be visible at different levels in the short, medium term, but will have a much deeper impact in the long term.

One of the most radical changes in terms of the reform of the education system that will have a direct impact to the units and the institution in the long term- has to do with gender equality. Under the current administration, the Army and Air Force have opened artillery and combat engineer schools to women, making a significant step towards full gender parity in the institution and in Mexican society. This transformation opens space for Mexican women to occupy leadership positions in operational units.

Another important change is the increasing the bar on academic requirements at the Heroico Colegio Militar (Heroic Military College), where graduates now receive a full university degree in military administration, raising the previous substandard senior technical degree in civil protection. In the War College, academic level of its graduates also increased up to a master's degree in military science. These increased academic standards –which have led to awarding full academic degrees-, translates into bolstering the military career's potential, by creating new opportunities for its personnel within and beyond the military institution.

The Centro de Investigación y Desarrollo del Ejército y Fuerza Aérea Mexicana-CIDEFAM (Army and Air Force Research and Development Center) was also stood up. CIDEFAM manages and proposes budgets for research into three fundamental fields: education, technology and healthcare.^{clxxvi} The Centro Militar de Ciencias de la Salud-CEMICA (Military Center of Health Sciences) was also created in March 2016. CEMICA concentrates all schools and laboratories of the military healthcare education sector.^{clxxvii}

The key change that will generate an institutional transformation in the long run is the establishment of a generalized introductory course in the initial stage of basic studies, standardizing the processes of militarization during the first six months for all accepted first year students. This common course will generate greater understanding among future officers of all arms and services.

During the current administration there has also been gradual increase in the participation of civilians in the defense education sector, specifically at the War College and National Defense College level. This is a positive step for the broader integration of civilians into the Mexican defense sector. As to the bilateral relationship with the United States, the number of Mexican students that are sent to study or train in the United States increased by over 400% in the 2015-2016 cycle compared to the 2014-2015 cycle (91 vs 22).

Additionally, the Peña Nieto administration has signaled its intention to build world-class armed forces, capable of projecting Mexico's power and protecting its interests globally.^{clxxviii} This will require a new generation of military thinking with technological capabilities able to deploy outside of its borders, including space and cyberspace if Mexico wants to develop into the emerging power status that corresponds with its upcoming top 10-ranked global economy.^{clxxix} With growing wealth comes added responsibilities and Mexico will need to contribute military forces to regional and eventually global multi-national security operations, regardless of its existing internal security challenges.

So far, the modernization programs have targeted existing—mostly internal security—capabilities and not an expansion of Mexico's power projection capacity. The latter will require a gradual but sustained effort, as the homeland security role continues to demand most of the existing budget's attention. The Mexican armed forces will need to adopt new procurement mechanisms, such as industrial and technology compensation programs known as offsets, which demand that procurement of large scale military equipment be linked to national development. That is, seller companies or governments are required to reinvest a proportion of their price tags back into the Mexican economy, either directly or indirectly over an agreed-upon timeframe. That sort of mechanism would create jobs in Mexico for every dollar spent on a new generation of fighter and transport aircraft, artillery, armor, frigates and more, which would otherwise be harder to finance.

Global Engagement: *Peacekeeping a la Mexicana*

The first steps in the evolution of Mexican military thinking took place in September 2014, when Peña Nieto announced that Mexico would participate in UN peacekeeping operations. The first group of twelve SEDENA and SEMAR observers were deployed to MINUSTAH in Haiti and MINSURO in Western Sahara in early 2016.^{clxxx} Mexico's contribution to UN peacekeeping will grow gradually, and will contribute to UNIFIL in Lebanon from 2016. It expects to set up a peacekeeping training center by 2018.^{clxxxi}

Mexican forces deployed on international peacekeeping operations will have to place special emphasis on full respect to international humanitarian law. The unlawful execution of cartel gunmen after a firefight with the Army in Tlatlaya during the summer of 2014 and the allegations that it failed to respond to the illegal detention by a cartel-infiltrated municipal police and likely execution of 43 men by the cartel in Iguala, on 26

September 2014, placed a stigma on the military. Despite criticism of its domestic human rights record by activists and NGO's, the Mexican armed forces continue to be—by far—perceived as the most trusted and efficient security institutions by Mexicans.^{clxxxii}

Mexico's decision to participate in UN peacekeeping operations is potentially one of the most significant reforms for its future. Not because of Blue Helmet contributions per se, but because it symbolizes the beginning of a departure from the inward looking doctrine that has dominated Mexican foreign policy since 1930.^{clxxxiii} A modern and globally connected foreign policy in tune with the 21st Century will eventually force one of the most respected, yet inward looking actors of Mexican society to look out to the world and adopt the highest international standards as a norm, eventually and hopefully resonating in fundamental aspects of Mexican's everyday life.

While the US military does not currently participate in UN peacekeeping operations, it possesses the gold standard in terms of global deployments. In May 2015, the FAM Commander was present in Manila to commemorate the 70th anniversary of the Mexican Expeditionary Air Force's 201st Fighter Squadron's landing in the Philippines.^{clxxxiv} A few months later, in early September 2015, 134 Mexican marines stormed a beachhead off the California coast. They were part of a Mexican Naval Task Force comprising a landing ship, an ocean patrol vessel and two helicopters that participated in Dawn Blitz 2015, a conventional amphibious assault exercise alongside U.S. Navy, U.S. Marine Corps, and the Japanese Maritime Self-Defense Force.^{clxxxv} Dawn Blitz was the first amphibious assault exercise in which the Mexican Navy participated from the planning stage and signals an evolution in Mexico's military thinking. As far as U.S.-Mexican military relations go, Mexico is well on a path to becoming more than a cooperative neighbor; it is in a position to prove it can be a trusted, as well as be a capable ally and key player in global affairs.

Next Steps on the Horizon

Despite a rapprochement process that began in 2006 and remains ongoing in 2016, the U.S.-Mexico military relationship still has ample room for growth. Increasing mutual trust should remain the key driver and that requires far more effort than political will. Bilateral trust needs to be a key goal for both militaries and once obtained, it needs to be constantly nurtured and reinforced. Therefore, new points of connectivity need to be established beyond the counter-narcotics or border security dimensions, to include defense education, industry, procurement, regional and extra-hemispheric operations.

Bilateral trust is unfortunately not a commodity that countries can procure; it is rather the product of a well-planned investment strategy. New points for connectivity need to be found and developed. While there are several points for up scaling connectivity, increasing interactions of the military education systems may prove to be the best foundation for future cooperation. Bilateral actions should include an increase in

exchange programs for undergraduate and graduate education levels through creation and expansion of *Semester Abroad* programs; increased academic and cultural activities that put Mexican and U.S. cadets in contact with each other for specific periods of time; and development of joint war games that can blend U.S. and Mexican units together with the common goal of the defense of North America.

To contribute to a common North American defense posture, Mexico will need to increase its border, maritime and air patrol assets: from December 2012 to December 2015, the Mexican military has selected or continued procuring mostly US-sourced or US-operated equipment that can contribute to internal security missions: Beechcraft T-6 Texan armed trainers, Sikorsky UH-60M Black Hawk helicopters, Beechcraft King Air 350ER surveillance and maritime patrol aircraft, Airbus AS565MBe Panther helicopters, CN235MP Persuader maritime patrol aircraft, Damen 4207 Tenochtitlan-class patrol vessels and HMMWV tactical vehicles.^{clxxxvi} Most of these assets are similarly employed by U.S. military and homeland security forces to intercept illegal intrusions, therefore opening another point for cooperation that can stretch from common live training and simulation, to operator's bilateral meetings and logistical support programs.

Securing the North American perimeter from rival state and non-state actors is a shared responsibility and there lies the first priority of an expanded and stronger military-to-military relationship. While investment in internal security forces is necessary, so is the need for Mexico to modernize its conventional capabilities to create a credible deterrent. Even if minimal, such an investment will require dozens of billions of dollars for new defense, command and control, and strategic transport capabilities. These figures include additional resources for space and cyberspace tools such as earth observation satellites and cyber defense centers. Military industrial and dual use technology cooperation programs are therefore another strong point to enhance connectivity between Mexico and the United States; particularly as Mexico's dual use aerospace sector is experiencing sustained growth. The required military technology upgrade does not need to be a drain on Mexican financial resources; it requires intelligent long-term investments to be strong and technologically-advanced enough to stand on its own; to defend its own.

Finally, the Mexican government's interest in becoming a more pro-active player in regional and global affairs is one area that can lead to a stronger bilateral military-to-military relationship.

The Mexican military's push to increase its hemispheric regional influence began in December 2014 with the appointment of senior general officers to leadership positions in the Inter-American Defense Board and Inter-American Defense College, both Washington DC-based multilateral organizations.^{clxxxvii} While these appointments are diplomatic positions aimed at increasing the Mexican military's footprint in the international political spectrum, they signal an intention that requires to be eventually matched with appropriate capabilities. In its next steps Mexico needs to define its long-term strategy and its willingness to commit to deeper international military cooperation.

Skeptics may reply that for Mexico to contribute combat forces to remote regions of the world it will require decades of training and billion-dollar investments. Similar skeptics were proven wrong over 70 years ago when Mexico deployed a fighter squadron to the Philippines. Likewise, critics that stress that Mexico needs its armed forces at home need to understand the value of lessons obtained from foreign deployments and international cooperation, and how these ultimately impact local security capabilities.

For the Mexican military to evolve positively, it needs to build an external narrative that reinforces its national defense role and balance this with its internal security and law enforcement support functions. Mexico's foreign deployment strategy as of 2016 remains ambiguous and would benefit from a clearly defined roadmap that marks immediate, mid- and long-term goals. That roadmap needs to be able to answer multiple questions: will Mexico deploy a company, battalion or brigade of troops for international peacekeeping operations? Will Mexico be in a position to contribute naval and air forces to support global stability deployments? In such a case, where and under what rules? Will they deploy in combat or combat support roles, or will they remain under the multi-national peacekeeping umbrella? Or all of the above? Will Mexican naval vessels join international anti-piracy operations? Will Mexican Special Forces be available to deploy jointly with their U.S. counterparts in the fight against Islamic radicalism? These are all questions for which their answers will help draft a long-term strategy for a more assertive Mexico and a stronger North America.

About the Author

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Iñigo is a subject matter expert in Latin American armed forces, focusing specifically on the Mexican military including arms trade trends, defense industry developments, and procurement policies. In addition to his work for IHS Jane's, he has been widely published and quoted in various mainstream media and academic journals and is repeatedly called on as speaker in U.S. and Mexican forums, including Houses of Representatives.

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Before joining IHS, from 2010 to 2015, Inigo was a Senior Analyst for Defense and Security at CENTRA Technology, a DC-based company serving a broad range of US and international clients with critical defense, intelligence, and security missions. Iñigo served as Director of Analysis in the Office of the National Security Council, Office of the President of Mexico, from 2008 to 2010, where he advised the Mexican government on infrastructure, technology, and equipment options available in the international market. Prior to this, since 2004 Iñigo served at state-level law enforcement agency as chief of statistical analysis in Queretaro

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Iñigo has a MA in international security from Georgetown University's Security Studies Program; he is a graduate of the Strategy and Defense Policy course from CHDS-NDU in Washington DC, and a BA in international trade from the Tec de Monterrey.

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