Contemporary Latin America has experienced a profound transformation. Significant advances in industrialization, urbanization, education, health care, and per capita income have set the region apart from other developing areas. Whereas many proclaim the emergence of a "new Latin America" at the advent of the twenty-first century (Kryzanek 1995; Wiarda 1995), however, we should not lose sight of the enduring legacy of Latin America's colonial past described by René de la Pedraja in Chapter 3. The values and institutions transplanted by the European powers during more than three centuries of colonial rule have been remarkably resilient. As they have been adapted to fit new realities, the region's dual political currents of traditional authoritarianism and emerging democracy have been blended and partially reconciled. The recurring clashes between the old and the new, between tradition and modernity, have strongly influenced the course of Latin American political evolution. The countries of Latin America have now reached a critical point in the process of political change.

As Richard Harper and Alfred Cuzán show in Chapter 6, the dramatic economic changes engendered through rapid modernization have had far-reaching social and political implications. The region's political history has been characterized by governments of virtually every conceivable type: monarchies, caudillo rule ("man on horseback"; a strong leader, often a military figure, who dominates politics through the use of force), populist regimes, oligarchic democracy, civilian and military dictatorships, revolutionary systems, Westminster-style parliamentary democracy, and bureaucratic-authoritarian states. Today, there has been a near-universal movement toward democratic civilian rule, with Cuba a significant exception to this trend. Despite the protracted socioeconomic crisis of the "Lost Decade" of the 1980s, the transition from authoritarian rule has generated great expectations among observers and mass publics alike. Although support for democratic elections, civil liberties, and greater pluralism is
increasing, the prevailing optimism has gradually given way to the realization that the task of regime consolidation is far from complete. Indeed, democracy is perceived by many to be "on trial" (Wians 1995), and the magnitude of the challenges confronting national governments is daunting. As a result, serious questions have been raised concerning the sustainability of democracy in the region. Is this trend a sign of genuine maturation and political evolution or merely another phase in the historical alternation of democratic and authoritarian impulses? In other words, are we now witnessing the "twilight of the tyrants" that was projected during the late 1950s and early 1960s (Scalone 1995)? Can popularly elected civilian leaders carry out painful economic reforms, deemed critical to the region's recovery and stability, in the face of mounting popular discontent? How will traditionally praetorian militaries respond to such discontent and to situations in which civilian governments prove incapable of ameliorating endemic problems and fulfilling the heightened expectations of increasingly mobilized publics? What must be done to promote further consolidation and to avert yet another devolution to authoritarianism? Can Latin America overcome its past?

Clearly, some countries have made greater strides than others in the process of democratic consolidation. In an area as diverse as Latin America, the experiences of, and prospects for, different countries vary considerably. Latin America is a region composed of disparate states (see Tables 4.1 and 4.2) with divergent colonial heritages, constitutional and cultural traditions, institutional structures, and levels of socioeconomic modernization. Such differences, however, which have contributed to the tendency in the literature to segregate analyses of subregions (defined largely by linguistic criteria), must not obscure common patterns of political evolution in the region (Hillman and D'Agostino 1992). Illuminating these commonalities as they pertain to contemporary politics and addressing the aforementioned questions is the dual focus of this chapter.

THE POSTINDEPENDENCE ERA

The three decades following the independence of the former Spanish colonies were characterized by economic stagnation and political turmoil. The break from Spain did not entail any fundamental socioeconomic or political transformation, as the wars for independence were essentially conservative movements intended to preserve the existing structure of society and to forestall radical change. Hence, the rigid two-class hierarchical structure remained in place, with the criollo replacing the peninsulares. In fact, many colonial institutions and practices endured (including authoritarian, centralized top-down rule), and in some cases flourished, well into the postindependence era. Independence removed the crown,
Table 4.2 Nonindependent Territories in Latin America, 1995

<table>
<thead>
<tr>
<th>Territory</th>
<th>Political Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anguilla</td>
<td>Associated state within the British Commonwealth (1982)</td>
</tr>
<tr>
<td>Aruba</td>
<td>Member of the Kingdom of the Netherlands (1986)</td>
</tr>
<tr>
<td>Bonaire</td>
<td>Member of the Netherlands Antilles (1954)</td>
</tr>
<tr>
<td>British Virgin Islands</td>
<td>British crown colony (1967)</td>
</tr>
<tr>
<td>Cayman Islands</td>
<td>British crown colony (1972)</td>
</tr>
<tr>
<td>Curacao</td>
<td>Member of the Netherlands Antilles (1954)</td>
</tr>
<tr>
<td>French Guiana</td>
<td>Overseas Department of France (1946)</td>
</tr>
<tr>
<td>Guadeloupe</td>
<td>Overseas Department of France (1946)</td>
</tr>
<tr>
<td>Martinique</td>
<td>Overseas Department of France (1946)</td>
</tr>
<tr>
<td>Montserrat</td>
<td>British crown colony (1966)</td>
</tr>
<tr>
<td>Puerto Rico</td>
<td>Commonwealth (&quot;free associated state&quot;) associated with the United States (1952)</td>
</tr>
<tr>
<td>Saba</td>
<td>Member of the Netherlands Antilles (1954)</td>
</tr>
<tr>
<td>Saint-Barthelemy</td>
<td>Administrative district of Guadeloupe (1946)</td>
</tr>
<tr>
<td>Saint-Martin</td>
<td>Administrative district of Guadeloupe (1946)</td>
</tr>
<tr>
<td>Sint Eustatius</td>
<td>Member of the Netherlands Antilles (1954)</td>
</tr>
<tr>
<td>Sint Maarten</td>
<td>Member of the Netherlands Antilles (1954)</td>
</tr>
<tr>
<td>Turks and Caicos</td>
<td>British crown colony (1976)</td>
</tr>
<tr>
<td>U.S. Virgin Islands</td>
<td>U.S. territory with local self-government (1968)</td>
</tr>
</tbody>
</table>

Source: Compiled by author.

Note: a. The Netherlands Antilles, consisting of Bonaire, Curacao, Saba, Sint Eustatius, and Sint Maarten, is a former Dutch dependency that is now autonomous in internal affairs under the charter of the Kingdom of the Netherlands. Aruba, formerly part of the Netherlands Antilles, assumed domestic autonomy as a member of the Kingdom of the Netherlands on January 1, 1986, and is scheduled to obtain full independence in 1996.

However, the only viable form of centralized political authority the area had known. Unlike Brazil, which retained the monarchy and its centralizing presence following independence in 1822, and the Caribbean region—most of which remained under European control for some time (including the Spanish colonies of Cuba and Puerto Rico)—Spanish America was basically left to its own devices. In the absence of a strong, unifying central authority and given the economic devastation wrought by the wars, the nascent Latin American states were ill prepared for independence and the arduous process of nation building.

Among the most problematic challenges were determining how the newly independent countries were to be governed and, subsequently, setting out to establish order and consolidate national authority. Although virtually all of the constitutions written after independence embraced democratic principles (such as the separation of powers) and called for representative government, they also included provisions for maintaining the power and privileges of traditional corporate groups, such as the church and the military, and for ensuring the dominance of the executive branch of government (Wiarda 1995:53). Early efforts to promote democracy were further constrained by the absence of a democratic tradition in the area and the dearth of well-established democratic institutions. The failure of these efforts underscored the difficulty of grafting a democratic political framework onto a society with a deeply rooted authoritarian heritage and a rigid, bifurcated social structure. At the same time, efforts to promote other forms of governance and to maintain stability at the national level were largely ineffective. Notable exceptions included Brazil, with its centralized monarchy, and Chile, where the early development of a system of oligarchical rule paved the way for a long tradition of stable constitutional government.

Few other countries, however, were able to keep in check the powerful disintegrative forces brought on by the removal of the crown. A vacuum of power and legitimacy at the national level contributed to the devolution of power to rival regional caudillos or competing elite groups. In some countries, the early independence era was marked by an intense struggle for control over national resources among rival caudillos and elites who alternated in power. In other cases, virtual anarchy gave rise to the emergence of powerful national caudillos who came to dominate their respective countries in the initial stages of independence. Perhaps the most notorious of these figures was Antonio López de Santa Ana of Mexico, whose leadership exacerbated political turmoil and brought Mexico into a conflict with the United States that resulted in a humiliating military defeat and a substantial loss of territory. Similarly, through a mix of personalismo (the dominance of the individual in politics), strong-arm rule, and repression, Juan Manuel de Rosas came to dominate Argentine politics from 1835 to 1852. Although Rosas provided some degree of order and unity in a deeply divided country plagued by regional disputes, his dictatorial style of rule failed to lay the groundwork for long-term stability. In fact, although often viewed as a "necessary evil" in societies characterized by disarray and fragmentation, caudillo rule perpetuated the institutional void by inhibiting the formation of new institutions. As Latin America embarked on the second half of the nineteenth century, the need for more permanent institutional arrangements was clear.

Although a modicum of order had been established by the mid-1800s, national politics throughout Latin America remained highly contentious. Loosely organized "political parties," typically called Conservatives and Liberals, emerged among the elite in the decades following independence. Beyond the primary distinctions that revolved around Liberal support for free trade, federalism, and the separation of church and state as compared with Conservative support for trade protectionism, centralization of authority, and the maintenance of traditional church power and privileges, little distinguished these groupings ideologically. The competition for power, however, was intense and often violent. At stake was access to national power and resources with which to reward supporters through patronage. Although the seemingly perpetual conflict greatly inhibited national
development early on, by 1850 signs of economic revitalization were appearing within Latin America. Spurred by the ongoing Industrial Revolution in Western Europe and North America, an influx of foreign investment (primarily British) stimulated the growth of national industries and economic infrastructure, all of which served to integrate Latin America into the emerging global economy as an exporter of raw materials and agricultural products. As the latter part of the nineteenth century reveals, socioeconomic modernization had profound political implications.

**EARLY MODERNIZATION AND DICTATORIAL RULE**

As the international demand for primary products increased, Latin American leaders sought to establish governmental systems capable of providing the stability needed to sustain the export model of development. Howard Wiarda (1995:60) has identified two general patterns that emerged during the late nineteenth century. In certain countries, including Chile, Brazil, and Argentina, the conservative oligarchy consolidated an exclusively national system of rule designed to preserve its interests and privileges. The gradual merging of the commercial elite with the traditional landed elites enhanced their ability to confront the challenge posed by the rising middle sectors and working classes spawned by economic modernization (and in some cases, such as Argentina, by the massive influx of European immigrants). Ultimately, in each case the system of oligarchic rule would give way under pressures for change engendered through rapid modernization.

In the case of Mexico, Howard Wiarda (1995:60) suggests that the successful promotion of “order and progress,” however, which had eluded Mexico since independence, came at a great cost. Critics charged Díaz with compromising Mexico’s sovereignty and hard-won independence by allowing foreign control of key sectors of the economy. Indeed, development was enhanced by the auspices of European and U.S. investors, who reaped enormous profits by exploiting Mexican labor and natural resources, particularly oil. Thus, such “progress” came mainly at the expense of the Mexican masses and served to exacerbate the inequality between, on the one hand, campesinos (peasants), whose land was often confiscated to enhance profits; and on the other hand the domestic elite, which profited from its association with foreign investors (Meyer and Sherman 1995:487-488).

Development also occurred at the expense of basic freedoms that had been established under the enlightened leadership of Juárez during the era of *La Reforma* (the reform). Although many in Mexico initially embraced Díaz’s authoritarian rule, his regime grew increasingly repressive and dictatorial. In his case, however, the authoritarian rule was replicated throughout the region in the early 1900s, socioeconomic development engendered enormous pressure for political change, most notably among the emerging middle sectors whose newfound stature did not translate into meaningful political power. In an ironic twist (one that would plague other Latin American modernizers as well), the success with which Díaz was able to promote “order and progress” ultimately sowed the seeds of his regime’s demise. His narrow, highly personalized, dictatorial style of rule grew increasingly anachronistic and untenable amid the profound changes brought on by rapid modernization. By 1930, these changes had undermined the old oligarchic order and facilitated the rise of middle-class politics in Latin America. In some
cases, such as in Argentina and Chile, this clash between the forces of tradition and modernity was resolved relatively peacefully, and the transition occurred through electoral means. In Mexico, however, Díaz's unwillingness to accommodate demands for political reform set the stage for the greatest upheaval in twentieth-century Latin America: the Mexican Revolution.

Although it began largely as an expression of middle-class disaffection with the Diaz regime, the conflict that engulfed Mexico from 1910 to 1917 soon evolved into a mass rebellion that claimed over one million lives. In the end, Mexico had experienced tumultuous change, yet a great deal of continuity with the past remained.

Despite a pledge to step down at the end of his term in 1910, Díaz was again fraudulently elected. His primary opposition, Francisco Madero, challenged Díaz's continismo (the practice of extending one's term in office beyond constitutional limits) under the banner of "effective suffrage beyond constitutional limits". After failing to effect political change through constitutional means, Madero fled to the United States, where in October 1910 constitutional means. Madero fled to the United States, where in October 1910 constitution was drafted. Again, the disparate revolutionary forces fragmented because of their divergent interests. Villa and Zapata broke with the Constitutionalist cause and dedicated their efforts to opposing Carranza. With the assistance of Obregon, Carranza was eventually able to subdue the rebel forces and consolidate his control over the nation. The 1916 constitutional convention, designed to institutionalize the revolution, resulted in the 1917 constitution - which remains in effect. Radical for its time, the constitution strictly limited the power and prestige of the Catholic Church, restricted foreign corporations, granted extensive rights and benefits to labor, and called for agrarian reform.

Given the country's history of conflict and fragmentation, the 1917 constitution was intended to forge a consensus by including provisions that would appeal to a variety of constituencies. In proclamation, however, did not signal an end to the conflict, nor did it bring about unanimous agreement regarding Mexico's future direction. Carranza himself, although he accepted the constitution, did not agree with all of its provisions and ignored many of them after assuming the presidency in mid-1917. In fact, his attempt to circumvent the no-reelection stipulation by naming his successor led to his removal by Obregon in 1920.

Despite his ignominious demise, Carranza successfully laid the groundwork for the institutionalization of a new political system that has produced unprecedented stability over the past several decades. Obregon, who succeeded Carranza in 1920 - gradually implemented the 1917 constitution and did much to enhance the power of the national government despite a period of economic decline, conflicts with the United States, and continued internal turmoil. Turmoil continued during the presidency of General Plutarco Elias Calles, whose implementation of the constitutional provisions of the constitution exacerbated church-state tensions. Calles, however, helped to institutionalize Mexico's revolutionary government by establishing the broad-based multisectoral National Revolutionary Party (PNR) in 1929. Designed to integrate all relevant organized groups into the political arena, the PNR enabled the Mexican government to control and coordinate all major social groups that could threaten its control. In creating institutionalized mechanisms that both facilitated and controlled popular participation, Mexican leaders provided the stability with which to confront the changes brought about by modernization. Ironically, the violent
Modernization, the pace of which varied considerably by country, significantly altered the social structure, and with the emergence of new power contenders came mounting pressures for change.

With the shift from exportation of primary products to industrialization (which occurred initially in the larger, more economically advanced countries of South America and in Mexico), incipient modernization gave way to a more accelerated version of socioeconomic change. Known as import substitution industrialization (ISI), this new development strategy was designed to stimulate domestic production of industrial and manufactured goods that had previously been imported. Latin American leaders viewed ISI as a means of creating jobs and reducing external dependence. Moreover, it was perceived as a symbol of progress, as evidence of Latin America's vast potential and its transition to modernity.

Accompanying rapid economic modernization were profound changes in Latin America's social structure, significant improvements in living standards, and heightened popular expectations. In addition to expanding an already sizable middle class in the larger, more advanced states, industrialization spawned a burgeoning urban working class whose organization into labor unions and, later, political parties marked the emergence of a new actor in the Latin American political arena. Over the next several decades, dealing with labor was one of the most pressing concerns confronting Latin American leaders.

Modernization generated substantial pressure for change in the traditional elitist political order. In confronting this pressure, Latin American political systems were flexible and innovative. Rather than disappear in the face of rapid change, traditional patterns, structures, and values were modified to both reflect and conform to new conditions (Wiarda 1995:79). For example, the old landed elite gradually absorbed the nascent commercial elite, a relatively easy process given the groups' limited numbers and generally compatible interests. Accommodating the middle sectors was more problematic because of their lack of cohesion and their divergent interests. In some cases, such as Mexico, accommodation occurred only after violent conflict, whereas in others, such as Chile, the process was relatively peaceful because the upper classes recognized that they shared a common interest in uniting against the masses. In both instances, the emerging groups were assimilated by expanding the traditional hierarchically organized power structure composed of the oligarchy, the Catholic Church, and the military. In this manner, although the status quo was technologically altered with the incorporation of new groups, the fact that these groups now had a stake in preserving the system ensured its perpetuation. In fact, their incorporation was contingent upon accepting the existing rules.

In contrast, less agreement existed regarding the most effective means of confronting the nascent urban working class. The initial reaction from those within the power structure was to exclude labor, as was the strong Marxist
and anarcho-syndicalist influence within the trade union movement was perceived as threatening. This approach became less viable in countries where ongoing industrialization increased both the size and potential power of organized labor. Simply put, it became increasingly difficult to ignore or repress workers whose awareness and expectations had risen dramatically and who were effectively mobilized within the union movement. Ultimately, a variety of strategies were employed in addressing the labor challenge; some proved to be reasonably effective in mediating class conflicts, and others exacerbated tensions and eventually provoked radical challenges to the existing order. Clearly, responses to the emergence of labor profoundly affected political evolution.

Recognizing the need to at least partially accommodate union demands, most Latin American leaders struggled to integrate labor into the power structure. In Mexico, for example, emerging power contenders have been co-opted into a corporatist state structure under the control of a single dominant political party (which since 1946 has been called the Institutional Revolutionary Party [PRI]). Through the PRI's unique sectoral structure, labor, along with the peasants and "popular sectors," has been accorded the status (and concomitant privileges) of major corporate groups. This arrangement has facilitated the organization and representation of divergent interests, albeit within a corporatist framework under the firm, watchful eye of the state. Nevertheless, this innovative blend of modern institutional structures and traditional patterns (such as patron clientelism and centralized, authoritarian decisionmaking) has peacefully co-opted labor into the prevailing system. The relevance of this approach to the rest of Latin America is limited, however, as is the likelihood that it can be replicated elsewhere, because of the unique circumstances confronting Mexico's postrevolution leaders and their idiosyncratic institutional arrangements.

In contrast to Mexico's "authoritarian democracy," a number of countries have managed to incorporate labor within pluralist party systems. This strategy was employed with considerable success throughout much of the English-speaking Commonwealth Caribbean. By the early 1960s, labor organizations had proliferated in the region, and the working class gradually emerged as a political force (Knight and Palmer 1989:12). This became apparent when labor disturbances broke out in response to deteriorating socioeconomic conditions, first in St. Kitts (1925) and culminating in Jamaica and Guyana in 1938. In the aftermath of these disturbances, a strong linkage between political parties and workers' unions was established in most British colonies, with Trinidad a notable exception. Although this link provided workers with access to the political process, it was accomplished largely under elite tutelage. In fact, the formation of parties and links to labor unions have been viewed by some observers as a means of integrating the masses into the existing framework of power and privilege.

In other cases—including Chile, Colombia, Costa Rica, Uruguay, and Venezuela—workers have also enjoyed access to participatory institutions. Nevertheless, the assimilation of labor has been a long, complicated process. For instance, a serious setback occurred during the 1970s and 1980s in Chile and Uruguay, when elected civilian governments were ousted by the military and replaced by brutal regimes that relied on repression in an attempt to demobilize the labor movement. The process has included trafficking and ongoing guerrilla conflict, as well as mass discontent culminating in two coup attempts in 1992 against an elected civilian government in Venezuela. As these cases illustrate, even in countries widely corporatized, labor can be reversed or constrained during periods of crisis and when rising demands go unfulfilled or are perceived as threatening.

The emergence of the labor movement elicited a different response in Argentina and Brazil, which saw the rise of populist dictators who appealed to the urban workers as a means of consolidating their power. In both cases, rapid industrialization that began in the late nineteenth century produced a burgeoning working class that became an influential political actor. Both Juan Perón in Argentina (in the 1940s) and Getúlio Vargas in Brazil (in the 1930s) employed traditional practices such as the creation of corporatist structures and the use of patronage through which labor would be integrated under state direction and control. But unlike Mexico's institutional framework, the process in Argentina and Brazil depended primarily on the charisma of individual leaders. The dearth of viable institutions, exacerbated by the highly centralized, personalistic authoritarian regimes in Peru and Vargas, became even more problematic by inhibiting institutional growth and the development of an effective, long-term mechanism with which to peacefully incorporate labor, both left and right.

The relatively lower level of industrialization and modernization in some of the smaller, less socioeconomically developed countries of the region—where conditions differed substantially from those in Mexico, Chile, and Argentina—precluded the formation of a sizable, highly mobilized working class. As a result, rather than seeking to co-opt labor, it was far more expedient for regimes such as those of Fulgencio Batista in Cuba, Rafael Trujillo in the Dominican Republic, François Duvalier in Haiti, Anastasio Somoza García in Nicaragua, and Alfredo Stroessner in Paraguay to brutally suppress the movement. In fact, these personalist dictators—in which virtually absolute power and authority were concentrated in the hands of a single individual—were among the most violent, oppressive, and long-lasting regimes in Latin America.
Although the use of repression effectively subdued the labor movement for a time, these regimes eventually faced mounting discontent and demands for change as the pace of development and modernization accelerated. The response to increasingly vocal opposition, however, was frequently an even greater reliance on coercion and intimidation. For example, Duvalier formed the dreaded Tonton Macoutes, a paramilitary force that terrorized the regime's opponents, and Trujillo transformed the Dominican Republic into a virtual police state. This type of state-sponsored repression, along with the continued domination of personalistic dictators, greatly inhibited the process of institutional development in societies basically devoid of any viable channels through which the regimes' opponents could press for reform. A persistently low level of institutionalization, coupled with the regimes' inflexibility in the face of modernization and their unwillingness to accommodate demands for reform, diminished the likelihood of a peaceful transfer of power and set the stage for the most turbulent period in Latin American history.

■ REVOLUTIONARY CHANGE

By the 1950s, industrialization had stimulated far-reaching change in Latin America. Urbanization and technological advances first necessitated, and later facilitated, improvements in both the transportation and communication infrastructure. The social structure grew more complex. Latin America was no longer semifuedal in nature, dominated by a rigid, two-class social hierarchy. Instead, it now exhibited a more differentiated structure, with the emergence of urban-based groups such as the industrial elite, the middle sectors (composed of white-collar professionals such as doctors, lawyers, teachers, and bureaucrats), and the industrial working classes—which grew in both size and political relevance. The size of the state had been expanding rapidly as a result of an increased demand for services and a greater role in the economy. Moreover, following the collapse of the old-oligarchic order around 1930, the middle sectors despite a lack of unity and cohesion—had become the predominant force in the military officer corps, the clergy, and the government bureaucracy. Yet the emergence of new power contenders created problems as the level of conflict among groups with divergent interests continued to escalate. In a number of cases, including El Salvador, societies became so polarized and disputes among groups so contentious that it was difficult for anyone to govern effectively. With political awareness and mobilization at unprecedented levels as a result of improvements in education and greater exposure to new ideas and values through the media, Latin America experienced a "revolution of rising expectations." The inability (because of fiscal constraints or political opposition) or unwillingness of national leaders to accommodate mass demands and rising expectations, along with a growing disparity between the rich and the poor (as industrialization had exacerbated preexisting inequalities), significantly increased the level of popular discontent. This mounting frustration and the realization that, in many cases, genuine change would not come about through peaceful electoral means fueled numerous revolts and guerrilla insurgencies. Such revolutionary potential instilled fear in the upper classes, as well as in some middle-class elements, who sometimes allied against the perceived threat from below in an effort to forestall the outbreak of class conflict. In Argentina, Brazil, and Chile, among others, this fear led to calls for the military to restore order. In other cases, disaffected members of the middle class led movements to overthrow governments and to bring about radical social and political transformation that, although not sustained, served as a portent of further challenges to the established order.

The 1952 Bolivian Revolution, which brought the National Revolutionary Movement (MNR) to power, was the culmination of years of political conflict and economic decline dating back to the Great Depression and the disastrous Chaco War with Paraguay (1932–1935). These events undermined the legitimacy, and precipitated the downfall, of the alliance between the traditional landed elite and the emerging mining elite that had dominated national politics and the economy. The MNR, a broad multiclass party founded in 1941 by disaffected members of the middle class, brought together a variety of groups opposed to the existing order. These included the urban working class—long excluded from the political process through literacy and property requirements and whose efforts to press demands were typically ignored or repressed—some disenchanted sectors of the military, and key sectors of the middle class whose demands went unfulfilled in the context of economic stagnation.

A series of revolts organized by the MNR in April 1952 helped to bring down a conservative government whose collapse reflected the inherent weakness of the Bolivian elites, which lacked sufficient resources to co-opt the emerging middle class as a result of Bolivia's low level of industrialization and a prolonged economic crisis. They also suffered from the lack of a strong, unified military that could suppress the challenge posed by the middle class (as in Peru, where the military prevented the American Popular Revolutionary Alliance [APRA] from taking power until 1985). After the revolution, the MNR came to include the Indian peasantry, who constitute the majority of Bolivia's population yet who had previously been excluded from national politics by electoral requirements. Led by Victor Paz Estenssoro, the MNR pursued an ambitious agenda emphasizing economic development and social justice. The revolution accomplished the granting of citizenship, voting, and other rights to the Indians to facilitate their integration into national life for the first time in the
country's history, the nationalization of the nation's largest tin mines and formation of a state mining corporation, and a program of agrarian reform. Factional strife within the MNR coalition, however, impeded efforts to sustain the revolution. The fragmentation of the MNR and a coup ousting Paz in 1964 ended Bolivia's revolutionary experiment and ushered in a period of military rule.

Guatemala's experiment with social revolution also began with disen­chanted sectors of the middle class organizing demonstrations and strikes against a regime they perceived as obstructing change. The popular revolt that toppled the dictatorship of General Jorge Ubico in 1944 marked the beginning of a "revolutionary decade" which led to substantial national development and reform, but which also brought Guatemala's revolutionary leaders into conflict with the United States (Ebel 1990:458). Following the ouster of Ubico, Juan José Arévalo was elected to the presidency in 1945. The Arévalo government introduced a program of land and labor reforms, coupled with political reforms aimed at encouraging popular mobilization and the creation of trade unions, political parties, and interest groups. These measures, which were well received by the masses, engendered strong opposition from conservative elements within Guatemala, as evidenced by the more than twenty attempted coups during Arévalo's tenure (Ebel 1990:458).

A peaceful transfer of power brought Colonel Jacobo Arbenz Guzmán to power following the 1950 election. Arbenz maintained his predecessor's commitment to social welfare and national development, promoting infra­structure development to spur the economy's growth new agenda. To this end, Arbenz introduced the Agrarian Reform Law in 1952, designed to expropriate uncultivated land for distribution to the peasants. This measure soon brought Arbenz into conflict with the United Fruit Company (UFCO), a U.S.-based multinational with extensive landholdings and substantial political influence throughout Central America. The perceived "attack" on UFCO by the Arbenz government caused great concern in Washington, in part because of close personal ties between the company and high-level U.S. government officials and in part because of a greatly exaggerated view of Arbenz as being a communist. Portraying Guatemala as a significant threat to its national security, the United States began efforts to destabilize and topple the Arbenz government. When diplomatic efforts proved insufficient, covert action was undertaken, with the Central Intelligence Agency (CIA) sponsoring an "invasion" by a small force of Guatemalan exiles that succeeded in overthrowing Arbenz in 1954.

The coup, which brought an end to the revolutionary decade, marked a significant turning point in Guatemalan politics. The Arbenz government was followed by a series of military or military-dominated regimes that have routinely violated civil liberties and committed human rights abuses, prevented institutional development, and heightened the degree of polarization in a society already deeply divided by race and ethnicity. Since the mid-1950s, Guatemala has experienced a protracted civil war that has claimed the lives of over one hundred thousand people and displaced thousands more. This conflict has pitted the government's security forces, along with against a left-wing paramilitary organizations and "death squads," some of which warned to form the Revolutionary Nationalist Union (URNG) in 1982. During this time, Guatemala has endured a level of violence and repression matched by few other countries in Latin America. The events of 1954 were also significant for the entire hemisphere. The actions taken by the United States to oust a popularly elected leader were a clear signal of both U.S. resolve to confront "communism" and of not be tolerated.

The Case of Cuba

The 1959 Cuban Revolution is one of the most significant events in Latin American history. Unlike the inability of the Bolivian and Guatemalan movements to sustain themselves over the long term, Cuba's revolutionary leadership—notwithstanding current difficulties—consolidated the revolution and brought about a complete social transformation. Cuban independence, achieved only after the United States intervened in the revolt against Spain in 1898 and subsequently compromised as the United States established a protectorate over the island, was defined by a strongman rule and military intervention in politics through the 1950s. Following the overthrow of Gerardo Machado, who was popularly elected in 1924 but who maintained himself in power illegally until 1933, a brief revolutionary period under the leadership of Ramón Grau San Martín was thwarted by a military revolt led by Fulgencio Batista. Batista dominated Cuban politics over the next decade, initially behind the scenes and later through direct rule from 1940 to 1944—a period in which U.S. economic and political ties to Cuba were strengthened. Two successive democratic governments—under the watchful eye of Batista—produced a variety of social and economic reforms, but their legitimacy (and that of the democratic alternative in general) was severely undermined by widespread corruption and endemic political violence. Finally, in March 1952, Batista launched another coup and instituted a system of authoritarian rule.

On the surface, Cuba during the late 1950s did not appear a likely candidate to experience a full-scale revolution. By Latin American standards, Cuba was relatively modernized and had reached a level of development on a par with that found in some of the larger countries in the region. Moreover, Batista cultivated close ties with the United States, which closely scrutinized Cuban affairs, given its proximity and the extensive U.S. business
interests on the island. Closer analysis reveals, however, that Cuba's development was badly skewed, producing enormous disparities between relatively modern urban areas and impoverished rural areas.

Batista’s harsh rule and what was seen by many as an overly accommodating stance toward the United States provoked strong nationalist sentiments and engendered broad opposition to his regime. Among the various groups seeking to oust the dictator was the 26th of July Movement, named after the date in 1953 on which its leader, Fidel Castro, launched an ill-fated attack on the Moncada military barracks. After his release from prison, Castro went to Mexico where he plotted to overthrow Batista. The struggle began in 1956 when Castro and his forces (numbering less than one hundred) returned to Cuba and waged a remarkably effective campaign of guerrilla warfare against Batista’s well-equipped (by the United States) army of around forty thousand troops. With his forces unable to quell the rebellion, Batista increased repression against students and other groups who led urban-based opposition to the regime, as well as against those suspected of sympathizing with the rebels. Lacking any substantial popular support and having lost U.S. backing, Batista fled into exile on January 1, 1959.

Batista’s sudden departure left a vacuum of power that Castro and his movement quickly moved to fill. As the broad revolutionary coalition began to splinter, Castro’s faction, including his brother Raúl and the Argentine revolutionary Ernesto “Che” Guevara, became the dominant force. The ultimate direction the revolution would take was unclear at this time, largely because of uncertainty about Fidel’s ideological orientation. Although Che Guevara, an avowed Marxist, maintained that he was not a Marxist prior to the revolution, Fidel Castro has given conflicting accounts over the years. He was not a member of the prerevolutionary Communist Party, focusing his appeal on the middle sectors as a nationalist reformer. Initial uncertainty over his intentions gave way to the realization that Castro was committed to a radical revolutionary program intended to irrevocably transform Cuban society and assert Cuban sovereignty and independence from U.S. influence.

Castro and his supporters established several mass organizations—including the Committees for the Defense of the Revolution (CDRs) and others geared toward labor, peasants, women, and students—along with a popular militia to mobilize support for the regime. Although this helped to provide the new regime with a type of institutional framework, the political system was restructured around the charismatic leadership of Fidel. In fact, it was his presence that did much to fill the institutional void that confronted revolutionary Cuba at the outset. Arguably the most charismatic figure Latin America has ever known, Castro has come to personify the revolution. His highly personalistic, centralized style of rule is consistent with Latin America’s caudillo tradition and has allowed him to consolidate his personal control over the country.

By late 1960, the country’s dependent capitalist economy had been dismantled and a majority of the economy nationalized, including the property of both domestic and foreign owners. This action, coupled with the movement toward an authoritarian single-party state, prompted the exodus of thousands of upper- and middle-class Cubans. Ironically, this exodus (and subsequent ones such as the Mariel Boatlift in 1980) has served as a kind of “safety valve” for Castro, helping to defuse internal opposition within his regime.

Another component of Cuba’s revolutionary agenda was a program of socioeconomic reform designed to improve the standard of living of its masses. This program included educational reform, a literacy campaign, and extensive efforts to improve health care and other social welfare services. These measures, along with plans to redistribute land and wealth, sought to address the glaring inequalities that had characterized pre-1959 Cuban society and to ensure that the basic daily needs of all Cubans would be met.

Castro was keenly aware of the precedent set in Guatemala and recognized that revolutionary Cuba would inevitably face U.S. opposition. Two actions that ensured this were the seizure of U.S. businesses and properties and the reordering of Cuba’s foreign policy, which resulted in close ties with the Soviet Union. Determined to reduce the pervasive U.S. role in Cuba’s economy and to diversify economic relations, Castro entered into a trade agreement with the Soviet Union in January 1960.
new source of technology (and, later, military assistance) and a market for Cuban sugar, Castro intensified his strident anti-U.S. rhetoric, and relations with the United States deteriorated rapidly.

The U.S. response came in April 1961. Alarmed by the increasingly radical tone of the Cuban Revolution, the Kennedy administration, acting on a plan devised under Eisenhower, sponsored a Guatemala-style invasion of U.S.-trained and equipped Cuban exiles at the Bay of Pigs. Intended to foment a counterrevolution within Cuba to topple Castro, the poorly organized operation failed miserably. A colossal U.S. foreign policy blunder, the Bay of Pigs represented a monumental victory for Castro, the young revolution, and Cuban nationalism. It provided definitive proof of Castro's contention that the United States was the mortal enemy of revolutionary Cuba and, according to many observers, pushed Cuba further into the embrace of the Soviet bloc (Skidmore and Smith 1992:366).

Indeed, in December 1961, Castro formally declared himself, and hence the revolution, Marxist-Leninist. Within a matter of months, Soviet leader Nikita Khrushchev ordered the installation of missile bases on the island, thus transforming Cuba into a stage for a Cold War confrontation that literally brought the world's superpowers to the brink of nuclear war. The October 1962 Cuban Missile Crisis was resolved when Khrushchev, under pressure from the Kennedy administration, agreed to withdraw the Soviet missiles in exchange for a pledge from the United States that it would not invade Cuba.

Over the next three decades, Cuba became a valuable Soviet ally in the Third World. The relationship gave the Soviets access to a critical strategic location in the Western Hemisphere (just ninety miles from the United States), and Soviet efforts to assist communist movements in Africa were bolstered by Castro's desire to "export revolution" and his willingness to contribute troops and other personnel to missions in Angola and Ethiopia. In return, the USSR provided the military protection and economic and technical assistance that facilitated the institutionalization of the revolution and enabled Cuba to survive the severe economic embargo imposed by the United States in 1962.

Critics of the revolution argue that despite all of Castro's rhetoric about asserting Cuba's independence from foreign domination, he did little more than replace the country's dependence on the United States with dependence on the Soviet Union. Although supporters counter that since 1959 Cuba has belonged to Cubans rather than to foreign investors, Soviet influence has been pervasive. Castro maintained a greater degree of autonomy than most other Soviet satellite states, but there can be no doubt that his longevity in power has been largely the result of Soviet backing.

Another factor contributing to Castro's longevity has been his style of leadership. He has established a centralized authoritarian state in which dissent is severely repressed, democratic civil liberties are nonexistent, and
human rights abuses have been widespread. Although Fidel Castro epitomizes the worst excesses of dictatorship and the brutality of Stalinist communism to many, however, he has remained immensely popular with much of the rural populace of Cuba. They point to the “achievements of the revolution,” the guarantee of education, health care, and other social services as the rationale for their support. They maintain that under Castro inequality has been greatly reduced, and that the poverty, malnutrition, and unemployment of the prerevolutionary period have been eliminated. To be sure, Castro has depended heavily on the Soviet Union to provide such benefits. But Castro’s popularity has also been derived from his willingness to confront the United States, which has given Cubans an immense sense of national pride and dignity.

The course of the Cuban Revolution has been influenced profoundly by the prevailing international context. For three decades, the bipolar global structure institutionalized during the Cold War enabled Castro to parlay his country’s strategic geopolitical location into leverage in dealing with the USSR. The situation changed dramatically, however, with the introduction of reforms such as glasnost and perestroika. Soviet rapprochement with the West caused Cuba to become a costly burden, both economically and politically. As the Cold War wound down and the Soviet domestic crisis deepened, its diminished ability and willingness to continue subsidizing Cuba led to an appreciable reduction in assistance. Further, as Cuba’s trade partners began to demand hard currency payments for imported goods, Cuba was forced to borrow from Western European banks to stay afloat, thereby accruing a substantial foreign debt (Kryzanek 1995:107).

The collapse of communist regimes throughout Eastern Europe and the dissolution of the Soviet Union have deprived Cuba of its primary trading partners, its source of economic and technical assistance, and its long-time benefactor. As one observer has noted, Cuba now faces a “double blockade”—the long-standing (and recently tightened) one imposed by the United States and the recent loss of Soviet bloc assistance (Kryzanek 1995:108). Ironically, with Castro left to fend for himself, Cuba may be considered truly “independent” for the first time since formally gaining independence almost a century ago. There have been signs that, despite his intense criticism of Gorbachev’s reforms and his oft-heard refrain of “socialism or death,” Castro is willing to adopt a more pragmatic approach to maintaining the revolution. For example, in an effort to attract much-needed hard currency, Castro allowed for the “dollarization” of the Cuban economy, thus enabling people to trade in U.S. dollars. He has also sought foreign investment, establishing joint ventures with a variety of foreign firms to stimulate the economy. In particular, Cuba is banking on a revitalization of the once-vibrant tourist industry to keep the economy, and possibly the regime itself, afloat. This approach is not without danger, however, as the influx of tourists (and their dollars, francs, pounds, and deutsche marks) will no doubt exacerbate inequalities and the sense of deprivation felt by many Cubans. This could prove especially troubling for Cuba’s youth, who face bleak prospects with few opportunities and who lack the previous generation’s strong emotional attachment to Castro and the revolution.

Castro has already defied the odds by surviving amid the collapse of the Soviet empire. As the Cuban people are asked to endure further austerity, Castro has depended heavily on the tourist industry to keep the economy, and possibly the regime itself, afloat. This approach is not without danger, however, as the influx of tourists (and their dollars, francs, pounds, and deutsche marks) will no doubt exacerbate inequalities and the sense of deprivation felt by many Cubans. This could prove especially troubling for Cuba’s youth, who face bleak prospects with few opportunities and who lack the previous generation’s strong emotional attachment to Castro and the revolution.

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Thomas J. D’Agostino

Juan Bosch (center, with tie) appearing at the Universidad Iberoamericano, Santo Domingo, in 1990.

was in danger of falling under communist control. With the defeat of the pro-Bosch forces, the post-Trujillo experiment with democracy ended, and former Trujillo protege Joaquin Balaguer took power and established a highly centralized authoritarian regime (friendly to the United States) that held power until 1978. Balaguer returned to the presidency in 1986, was reelected in 1990, and, as Kevin Yelvington discusses in Chapter 9, won again in 1994 amid charges of fraud.

Subsequent interventions in Chile in 1973, in Grenada in 1983, and in El Salvador and Nicaragua throughout the 1980s further reflect the U.S. preoccupation with containing leftist movements and regimes influenced by Castro and the Cuban Revolution. Whether through the CIA (as in Chile), direct military intervention (as in Grenada), or providing technical assistance, military training and equipment, or economic aid to governments (as in El Salvador and Jamaica) or to counterrevolutionary groups (as in Nicaragua), the United States has actively opposed efforts to promote radical change. A similar response came from Latin American elites who, when civilian regimes proved incapable, often turned to the military to confront the threat of Cuban-style revolution.

The Cuban Revolution alerted Latin American leaders and elites, as well as U.S. policymakers, to the potential for further radical change within the region. The Cuban example emboldened revolutionary movements as Latin American societies became increasingly polarized. Civilian leaders were caught between powerful opposing forces: those on the left, frustrated by the slow pace of reform and demanding radical change, and those on the right, seeking to preserve order and forestall change. The fact that both sides were willing to utilize force to achieve their objectives was even more problematic, leading to an escalation in violence and a forceful response from national militaries. During the 1960s-1980s, many of the Spanish-speaking countries (and Brazil) endured yet another descent into authoritarianism. Among the more notable exceptions were Colombia, Costa Rica, and Venezuela, where democratically elected civilian leaders retained power and direct military rule was averted.

Even in the Commonwealth Caribbean, where most nations were attaining independence and establishing their own systems of Westminster-style parliamentary democracy during this period, democratic governments were imperiled or fell prey to authoritarianism. Increased political violence plagued St. Lucia and Jamaica, where several hundred people were killed prior to the 1980 election, and the collapse of liberal democracy led to military rule and the formation of one-party states in Guyana and Grenada, as well as in the former Dutch colony of Suriname (Stone 1985:15). An attempted coup launched by fundamentalist Muslim officers (the Jamaat-Al-Muslimeen) in Trinidad in 1990 suggests that although democracy has indeed “flourished” (Domínguez, Pastor, and Worrell 1993) in the Caribbean, significant threats remain.

A variety of factors contributed to the wave of military coups that occurred in Central and South America during this period. Most were precipitated, at least in part, by the political and economic challenges faced by civilian leaders, who were unable to contain rising levels of violence. Economic stagnation was also a decisive factor in some coups, with a lack of development considered by many military leaders to be a catalyst in guerrilla insurgency and urban rebellion. Having received extensive military and academic instruction at institutions such as Brazil’s Superior War College, Peru’s Center for Higher Military Studies, and U.S. training centers, many officers were confident of their ability to preserve order and promote national development.

Actions taken by civilian leaders to mobilize the masses also provoked military interventions. In Brazil and Chile, leftist leaders appealed directly...
to the masses with promises of reform in attempts to build support. In the end, these actions stirred fears among the upper and middle classes of a “threat from below,” leading them to appeal to the military to oust João Goulart (Brazil) and Salvador Allende (Chile)—the first popularly elected socialist in Latin American history. In addition, these coups and a number of others can be attributed to threats, real or perceived, to the corporate interests of the military. Budget cuts, meddling in internal military affairs (such as promotions and the determination of strategies and missions), and plans to arm popular militias were viewed as detrimental to military interests.

The fact that many Latin American countries reverted to authoritarian military rule during the 1960s and 1970s should not surprise those familiar with the history of the area. The Iberian colonial powers imbued their New World possessions with a strong military tradition, and since independence preautoritarianism (a form of militarism in which the armed forces consider their corporate interests to include control of the state) has been, in most cases, the rule rather than the exception. The 1964 Brazilian coup, however, introduced a new form of military government that was very different from previous periods of military rule. For example, in contrast to the pattern of caudillo regime characteristic of the early postindependence era, in which individual leaders ruled in a highly personalistic manner, the new bureaucratic authoritarian regimes were governed by the military institution with the assistance of key civilian technocrats (such as economists) on whose expertise the military relied (O’Donnell 1973). These new governments exhibited a much higher level of professionalism, as a result of extensive training and education, than the early caudillo dictatorships.

**A New Pattern**

Bureaucratic authoritarianism also differed from more recent instances of military rule. Whereas national militaries had previously played a more moderating role behind the scenes, intervening briefly to replace an unacceptable civilian government, bureaucratic authoritarian regimes pursued a much more ambitious agenda. Guided by the national security doctrine (analyzed by Paul Zagorski in Chapter 5), military leaders viewed internal leftist subversion as the primary threat confronting their societies. Acting under the premise that such subversion was fueled by a lack of social, political, and economic development, military leaders—bolstered by increased professionalization and the policymaking expertise provided by civilian technocrats—adopted a greatly expanded role that entailed long-term institutional rule as opposed to the brief interventions of the past. A wholesale restructuring of both the economy and (especially) the political system was deemed necessary by military leaders to effectively address the root causes of instability. A key to economic revitalization was attracting foreign investors who had the capital and technology Latin American countries needed. This ability depended on military rulers’ corporate interests.

The leaders of bureaucratic authoritarian regimes considered traditional politics to be one of the principal factors contributing to the high level of instability within Latin America. They viewed civilian leaders with disdain, deeming most to be inefficient, corrupt, and absorbed in self-serving support for a specific, narrow political agenda that served to polarize the population and maintain an environment favorable to corporate interests.

In seeking to eliminate the causes of disorder and upheaval, bureaucratic authoritarian regimes curtailed political activity by banning political organizations and other popular parties and many interest groups. Student associations and other political parties were seen as divisive, with their actions mobilizing the masses to perpetuate the status quo. In the first phase of the military docente (twelve years) was led by a reformist government with elite interests in guarding against any challenge to the status quo.

**The Cases of Brazil, Argentina, and Chile**

This pattern is best illustrated by events in the three most conspicuous cases of bureaucratic authoritarian rule: Brazil, Argentina, and Chile. The 1964 Brazilian coup that ousted Goulart introduced this new form of military rule to Latin America. Threatened by Goulart’s proposed reforms, the military leaders viewed internal leftist subversion as the primary threat confronting their societies. Acting under the premise that such subversion was fueled by a lack of social, political, and economic development, military leaders—bolstered by increased professionalization and the policymaking expertise provided by civilian technocrats—adopted a greatly expanded role that entailed long-term institutional rule as opposed to the brief interventions of the past. A wholesale restructuring of both the economy and (especially) the political system was deemed necessary by military leaders to effectively address the root causes of instability. A key to economic revitalization was attracting foreign investors who had the capital and technology Latin American countries needed. This ability depended on military rulers’ corporate interests.

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Brazil’s outstanding loans, but the Miracle wore down under the burden of debt-led development. The second oil shock in the late 1970s further increased Brazil’s energy costs and sparked a severe recession in the industrialized world that had devastating repercussions for Brazil. Although export markets contracted, rising interest rates sharply increased the country’s debt payments, thus ending the Brazilian Miracle.

Concurrently, opposition to the military regime had mounted. The Miracle produced substantial growth, yet the distribution of this new wealth was skewed heavily toward foreign investors and their domestic elite allies. The vast majority of Brazil’s population saw scant improvement in the standard of living. Hence, the Miracle exacerbated the already substantial gap between rich and poor and frustrated those who did not share in its benefits. The harsh treatment of the labor movement, which organized strikes and demonstrations to protest government policies, also heightened tensions and contributed to the regime’s failure. But most devastating to the military rulers was their inability to sustain the Miracle and counteract the economic decline of the late 1970s-early 1980s. Popular protests shook the regime as spiraling inflation and an unmanageable debt eroded the support of the middle and upper classes—those who had initially sought military action to “save” the society. As opposition broadened, the military allowed a gradual political opening (abertura) that culminated in the transition to civilian rule through a military-supervised presidential election in 1985.

In contrast, the Argentine military was unable to maintain control of the transition process. Although it possesses one of the highest levels of socioeconomic development in Latin America, Argentina has experienced considerable economic and social instability and since 1930 has been subject to repeated military interventions in national politics. Much of this turmoil has revolved around the influence of peronismo, the populist dictatorship of Juan Perón, which could not be eliminated despite his ouster in 1955. In fact, efforts to suppress peronismo only seemed to bolster its followers. After two civilian governments failed to eradicate peronismo, the military seized power in 1966 and established its version of Brazil’s bureaucratic authoritarian regime.

Efforts to demobilize politicized groups (e.g., students and labor, the most ardent supporters of peronismo) failed, and violence escalated. The ineffectiveness of these efforts compelled the military to return power to the civilians in 1973, a process that culminated in the return to power of Juan Perón after eighteen years of exile. With the peronist movement deeply divided, even Perón was unable to stem the tide of violence and economic decline. His death in 1974, and the disastrous rule of his second wife (and vice president), Isabel, led the military to again seize power in 1976.

This time the military was determined to take forceful action to stabilize Argentina. In response to an increasing level of violence, the military embarked on a ruthless campaign of terror against urban guerrillas (Montoneros), suspected sympathizers, and the Argentine left in general. Matched in its intensity and brutality only by the actions of the Chilean security forces, this “war against subversion” (as it is referred to by the military) resulted in the arrest, detention, torture, murder, or “disappearance” of tens of thousands of people. The “Dirty War,” as it has been called by others, caused Argentina to be condemned by much of the world community and engendered widespread domestic opposition.

This opposition, coupled with the regime’s inability to revive the economy, led Argentina’s military leaders to search for alternative ways to legitimize their role. In an attempt to divert attention from domestic problems and appeal to the public’s sense of nationalism, in 1982 the military launched an invasion of the British-held Falkland (Malvinas) Islands, a small group of islands off its coast over which Argentina has maintained a long-standing claim. Badly understimating Britain’s resolve to keep control of the islands (and overestimating the effectiveness of its own forces), the Argentine military was dealt a humiliating defeat that led it to relinquish power in 1983, with little control over the transition to civilian rule.

Chile’s descent into bureaucratic authoritarianism began with the electoral victory of socialist Salvador Allende in 1970. In leading Chile down the “peaceful road to socialism,” Allende introduced policies that engendered intense opposition and further polarized the deeply divided society. Chile’s economy fell into a period of severe economic and social crisis, the Callejón armed forces—with the backing of the upper and middle classes (and a degree of U.S. support)—overthrew Allende in 1973 in a bloody coup that cost Allende his life and led to around five thousand additional deaths in its immediate aftermath. The forceful intervention, which was completely at odds with Chile’s long tradition of stable, democratic, constitutional rule, led to the formation of a bureaucratic authoritarian regime under General Augusto Pinochet. Pinochet abolished political parties, closed the national congress, and embarked on a brutal campaign to suppress the left. Adopting a free-market approach (with the assistance of civilian technocrats trained at the University of Chicago), Pinochet opened the Chilean economy to foreign investment and competition. The initial results were problematic for the standard of living fell. The national debt skyrocketed as Chile borrowed heavily to stimulate development and the restructuring of the economy. Ultimately, the program paid dividends, and Chile enjoyed steady growth after the early 1980s.

Despite Chile’s impressive economic resurgence under Pinochet, opposition to his rule mounted. International criticism focused on the regime’s dismal human rights record, including the pervasive use of torture deemed threatening to national security. On the domestic front, widespread protests and strikes led to a 1988 referendum to demand
Pinochet would continue as Chile's president for another term. In a stunning turn of events, Pinochet suffered a decisive defeat, paving the way for a return to democratic civilian rule in 1990.

**The Demise of Military Control**

Military disengagement from power and the demise of bureaucratic authoritarian rule in these cases can be attributed to three factors. First, the ruthlessness with which military regimes suppressed internal opposition generated substantial criticism and condemnation. Whereas international criticism at times proved troublesome for the regimes, internal domestic protests—which tended to provoke even greater levels of repression—severely undermined regime support. For example, as Susan Tiano shows in Chapter 10, the Madres de la Plaza de Mayo have been influential in bringing international attention to human rights abuses in Argentina.

A second factor prompting a "return to the barracks" was the economic performance of the military regimes. Despite intense criticism of its civilian predecessors, the performance of the Argentine military was dismal. Even in Brazil, which experienced a remarkable period of growth, the long-term performance was little better than that under civilian rule. Only Chile experienced much success, although critics maintain that it was the result of massive borrowing and that the social and political costs were enormous. In any case, the poor overall performance of the Argentine and Brazilian militaries led to their retreat from power, and even Chile's relative success was not enough for the public to prolong Pinochet's tenure.

A final factor contributing to the demise of bureaucratic authoritarianism was the perceived damage poor performance did to the military's reputation. Without question, the image of most militaries was tarnished, perhaps nowhere more severely than in Argentina. Not only did the regime fail to revive the economy, but the level of repression during the Dirty War reached horrific levels. Moreover, the military thoroughly discredited itself during the Falklands debacle. In general, concerns that perpetuating its rule could spark the outbreak of civil strife or exacerbate factional disputes and potentially divide the military itself brought about the withdrawal of the military from power and the transition to civilian rule.

**DEMOCRATIZATION**

**The Economic Challenge**

As military regimes throughout Latin America relinquished power, various attempts to promote the spread of democratic government were undertaken during the early 1980s: A decade later—following the U.S.-led People's Revolutionary Government in Grenada, the election of Patricio Ayala-Bertrando Aristide in Haiti—the Castro regime in Cuba stood as the sole remaining authoritarian dictatorship in the Americas. Clearly, movement has occurred toward more open, competitive, pluralistic forms of politics. The ultimate results of this transition, however, have been the subject of much debate. Whereas some maintain that this is truly the "twilight of the tyrants" envisioned decades ago, suggesting that Latin America has finally evolved into a stable, democratic region, others counter that the current era is merely part of an ongoing cyclical alternation between the forces of democracy and authoritarianism. Has sufficient progress been made to enable elected civilian leaders to surmount the considerable obstacles to the consolidation of democratic rule? If not, then what lies ahead?

The return to elected civilian rule was welcomed enthusiastically in societies weary of the harshness of authoritarian military rule. The opening of political systems, however, came precisely at the time national economies were experiencing great difficulties. The profound socioeconomic crisis that enveloped the region during the Lost Decade of the 1980s—the most severe since the time of the Great Depression—seriously hindered efforts to promote development, as well as the ability of newly elected civilian leaders to meet popular expectations that had risen to unprecedented levels. The perceived "failure" of the new governments raised serious questions about the viability of democracy within highly mobilized yet frustrated societies.

Although a variety of challenges confronted national leaders during the Lost Decade, in Chapter 6 Richard Harper and Alfred Cuzán show how the precipitous economic decline was very problematic. In part, the region's economic malaise during the 1980s was the result of ill-conceived policies pursued in the aftermath of the 1973–1974 OPEC oil shock (although other factors beyond the control of Latin American governments also were present). Rather than taking measures to slow the pace of industrialization and development, the region's governments (many under military control) pressed forward. To pay the rising costs of imported oil and to finance developmental projects, they began to borrow from abroad. By the end of the 1970s, the three largest debtors in the region (Brazil, Mexico, and Argentina) had amassed a total debt of roughly $150 billion, while during the 1980s the total foreign debt for Latin America surpassed $400 billion.

All sides had expected continued growth to enable the borrowers to meet debt payments without difficulty. Conditions deteriorated dramatically with the onset of global recession in the early 1980s, however, as the interest rates on outstanding loans rose sharply, and declining demand for...
EARLY CIVIL-MILITARY RELATIONS

Military prestige, privilege, and special political role have deep roots in the Iberian tradition. The transplantation of this tradition was no mere coincidence. The Moorish kingdom based in the city of Granada fell in 1492, capping off the reconquista (the reconquest); Columbus’s first voyage to America occurred that same year. With the destruction of the last Moorish stronghold in the peninsula, Spain and its military aristocracy were, literally, looking for new worlds to conquer. Striking similarities between the conquest of America and the reconquest of Iberia promoted the transfer of institutions and practices from the old world to the new. This legacy included a social system that fused military power, social prestige, and landed wealth.

The important and frequently pivotal role the military was played in most Latin American countries is made clear by René de la Pedraja in Chapter 3 and Thomas J. D’Agostino in Chapter 4. This role, however, requires further elaboration, for the armed forces are likely to be more critical than ever in establishing democratic stability or easing the way for a return of political instability or authoritarianism. And we cannot adequately understand the armed forces without appreciating the historical legacy embodied in their current institutions and practices. From the time of the conquest, the military has played a key role in frontier security and, intermittently, in the maintenance of internal order. The armed forces have enjoyed a privileged corporate existence whereby individual members gain status and rights through their group membership. Yet despite this continuity, significant changes have occurred in the class origins of members of the officer corps, the military’s doctrine and materiel, and its political orientation. And the military continues to evolve.
Spanish and Portuguese rule was based on a strong mutual interest that linked the mother country with the local European elite (criollos). Yet local and imperial interests diverged in a variety of ways, and reforms in the late eighteenth century provided a glimpse of increased trade and expanded local economic activity without resolving these antagonisms. Thus, it was not surprising that when the Napoleonic wars provided Spanish America and Brazil with the opportunity to gain more control of their own affairs, they took it.

Brazil's eventual declaration of independence was not contested by Portugal, thus paving the way for the continuance of the established social and political institutions (including the monarchy) and in Spanish America, the military tradition was modified rather than displaced, even in the face of wars for independence. Revolutionary generals (caudillos) played pivotal roles in these wars. Whereas intellectuals could provide the rationale for independence by popularizing the rights of individuals proclaimed by the French Revolution, only military force could secure independence and establish the authority of a new government.

More than North Americans, the newly independent Spanish Americans found the process of gaining independence and establishing governments fraught with problems. Caudillo-led military forces were both part of the solution and part of the problem. Only they could unify nations; yet reliance on force promoted the region's fissiparous tendencies. Schemes for a nearly region-wide government for Spanish-speaking America (most notably Bolívar's Gran Colombia) collapsed in a welter of factional fighting and local revolts. Moreover, the lack of a professional, competent, and effective military institution, combined with the personalized character of military leadership, made it easy for rebel leaders to seize power. Successful caudillos became presidents and were threatened in turn by other caudillos. The lack of a dominant independent small-farmer class (the preponderant group in most parts of English-speaking America) meant there was no civilian republican counterbalance to the militarization of politics. Thus, the process of mobilizing armies of the disenfranchised carried the danger of social instability without the promise of establishing stable republican institutions.

In sum, the nineteenth-century military inherited many characteristics from the periods of imperial rule and wars for independence. Military leadership was personalistic and relied on a fusion of social, military, and political roles. The military continued to have certain institutional rights and privileges (fueros) that separated it from the rest of society and limited the jurisdiction of civilian courts over military officers. As a general rule, the military could not adequately fulfill its missions of frontier defense, internal pacification, and protection of the government against armed revolts. In fact, as we have seen, to speak of "the military" as if it were a unified, centrally organized institution is an oversimplification. In Brazil, rivalries between the professional officer corps and the militia officers in the hinterland were dysfunctional. In much of Spanish America, the weak generals remained a part of the system.

### EARLY PROFESSIONALISM

Given the inadequacies of the military system in the nineteenth century, it is not surprising that military reform became part of a complex of changes meant to modernize the state and provide the basis for economic development. As the century wound down, governments and military reforms. Britain, France, and Germany were particularly happy to send military missions to Latin America to assist in the restructuring of both armies and navies. Thus, European rivals provided both material and advice. And as the twentieth century began, few countries believed they could afford to be without projecting power into or defending disputed territory.

The race toward modernization required professionalization. New equipment, new organizations designed to use the equipment effectively, and a reserve system capable of raising mass armies necessitated an officer corps that could manage these complex new elements of military science. New demands meant officer recruitment and promotion practices—such as political connections, class status, or nepotism—would no longer suffice. Modern military officers were charged with managing large numbers of specialized troops with new and complicated weapon systems over great distances. With more effective national military organizations, governments were able to suppress revolts by regional caudillos and in-planning to meet foreign threats. And probably most important, the character of the officer corps itself was eventually transformed.

Professional officership entailed its own set of norms and habits—a military mentality that influenced the way in which officers addressed military and political issues. In the eyes of the professional, national concerns were not simply a matter of personal ambition but was the result of exigencies of geopolitical forces. National strategy required professional attention and direction. The issue of military power became much broader than the immediate size and condition of the armed forces.

The military power of modern states rested on a social and economic base, the cultivation of which became a matter of governmental concern. Military decisionmaking specifically and governmental decisionmaking generally (if it were to be done properly) needed to take on a technical cast.
addition, professionalization gave the armed forces yet another reason to assert their traditional privileges over the political class. The technically proper direction of the military institution required that trained professionals make military decisions. At all costs, civilians must avoid the "politicization" of the armed forces that occurs when politicians interfere with personnel matters or questions of internal military policy.

Hence, professionalization provided an additional basis for asserting military tutelage over politics. Many of the early-nineteenth-century constitutions had provided for military enforcement of law in emergency situations. In addition, others established the armed forces as a guardian of the constitution, a virtual fourth branch of government. These legitimations had provided a pretext and legal cover for dictatorial rule by military caudillos, and such constitutive provisions persisted into the twentieth century. Whereas caudillos could use such provisions to support their personal ambitions, the new officer corps could cite them as the legal rationale for asserting its institutional interests. In short, changes brought about by professionalization made the military more than just a vehicle by which individuals sought power; it became an institutional actor in its own right. The military had developed a new relationship with the rest of society. The military had developed a new relationship with the rest of society.

Military officers formed lodges that had nationalist and vaguely progressive orientations. Dissatisfied with the politics and policies of conservative cliques, military personnel applied pressure for political reform, in a divisive fashion, military personnel applied pressure for political reform.

Professionalism also meant discipline. Military organizations could function effectively, and the nation would be put at risk, if personal interests and opinions were not ultimately subordinated to the authority of the military institution.

Military officers received their education at military academies and, in some cases, military secondary schools. Promotion was a step-by-step process that required further education, appropriate (often unattractive) postings, and seniority in the next-most-junior grade. Such requirements led to the exclusion of the social elite from choosing officership as a career. For the lower middle class, however, the promise of free education and career prospects that exceeded opportunities in civilian life more than offset the disadvantages. Thus, professionalization changed the class composition of the officer corps, but even more, it imbued professional officers with a mentality that distinguished them from other members of the middle class.

Professionalism meant technical expertise. Professional military leadership required more than personal charisma; it demanded the mastery of technological and organizational skills. In military science, as in engineering, there were better and worse solutions to problems, as well as nonsolutions. Tactical and strategic doctrines (the principles for employing military force to fulfill military missions) were not a matter of personal taste. Doctrine was to be grounded on an understanding of scientific laws. It was the product of disciplined scientific investigation rather than of majority vote.

Professionalism also meant discipline. Military organizations could not function effectively, and the nation would be put at risk, if personal interests and opinions were not ultimately subordinated to the authority of the command structure. Professionalism meant loyalty to the nation and the armed forces above all else. Military officers were expected to subordinate such extraneous loyalties, and they expected that governments would avoid anything but professional considerations in their governance of the military institution.

It is hard to imagine a worse match than that between the professional officer and the politician. Compromise, bargaining, and the satisfaction of factions and interests are the very stuff of politics. To the professional officer, these activities seem mildly unsavory at the least or totally corrupt at the worst, hence the military's ambivalence toward politics and government. In professional terms, at least in theory, politics is something to be avoided. Yet in practice, such an apolitical stance was out of harmony with the Latin American tradition and with what military officers often saw as the overriding national needs.

Thus, whereas professionalization did not mean the abolition of military intervention into politics, it did alter the motivation for such interventions. Between the two, the professionalism of military personnel against the intrusion of politics, as well as the promotion of national power, became additional rationales for military intervention. Nonetheless, military involvement in politics rarely resulted in the long-term displacement of civilian institutions. As individuals, officers could gain a political following because of a military career, but when they became involved in long-term politics they normally reverted legally to a civilian or retired status. As an institution, the armed forces served as a balance or mediator or intervened to protect the autonomy of the institution itself from what it considered undue political control.

Normally, after a coup the armed forces ruled the country for a brief period, until an acceptable version of the status quo ante could be reestablished and...
then returned to the barracks. Political coups, like elections in consolidated democracies, were a widely accepted, almost normal means of transferring power and assuring a more general stability.

In sum, by the mid-twentieth century, professionalization had changed the character of the armed forces in part but not—as had occurred in the radical left throughout the region. Whereas mainline communist parties had declared that revolution was impossible in the short term, Castro’s revolutionaries were overly optimistic, their opponents overly alarmist, and the initial analyses of the cause behind the revolutions wide of the mark is beside the point. All of Latin America seemed on the brink of violent left-wing guerrilla-led revolution. A military response was inevitable.

In less industrialized countries and in which political party development was different, the pattern by which the disenfranchised lower classes became a critical factor varied. Yet in almost all instances, maintaining stability could not be achieved simply by buying off and incorporating relatively small, organized groups into the power structure.

By 1930, this social and political problem had assumed a military dimension. The victory of Cuban revolutionaries in January 1959 energized the radical left throughout the region. Whereas mainline communist parties had declared that revolution was impossible in the short term, Castro’s guerrillas and the 26th of July Movement had demonstrated the opposite. The Cuban Revolution provided a model, and Cuba provided a base of support, for would-be revolutionaries throughout Latin America. The fact that the revolutionaries were overly optimistic, their opponents overly alarmist, and the initial analyses of the cause behind the revolutions wide of the mark is beside the point. All of Latin America seemed on the brink of violent left-wing guerrilla-led revolution. A military response was inevitable.

This response came in the form of the national security doctrine, which was at the core of what was termed the new professionalism. Traditionally, professional armed forces had focused on external threats. Strategy, tactics,
organization, and the acquisition of matériel were premised upon deterring
and fighting against neighboring states or others that could effectively
threaten the territorial integrity of the state through outright military inva-
sion. Latin American countries had developed military institutions de-
signed to fight conventional wars. Involvement in domestic politics had
been the by-product of Latin American constitutions and political tradi-
tions rather than of professionalism per se.

The national security doctrine changed all that. The primary enemy
was now underdevelopment, which spawned subversion. Subversion's pri-
mary logistic and recruitment base was not the elaborate depot and train-
ing system of a foreign conventional armed force but was a group of the
citizens of the country itself, who provided direct and indirect support as
well as recruits for the guerrillas. Thus, military concepts for fighting wars
(military doctrine) had to change.

Military theorists in many countries, both inside and outside Latin
America, had considered the problems associated with this sort of internal
war. Although significant differences existed in the strategy and tactics
they recommended, a common thread ran throughout their analyses. Irreg-
ular forces—guerrillas who fought a hit-and-run war of attrition—were the
direct military threat and would have to be defeated. An effective strategy,
however, would have to provide for defeating the logistic, intelligence, and
recruitment bases, as well as underdevelopment itself; otherwise, no final
victory would be possible. The defeat of the guerrillas would be tactical
only, and armed conflict would easily reemerge. The underlying cause of
subversion was the lack of social, economic, and political development. A
proactive policy was likely to be more successful and much less costly
than a simple reactive response.

Much of the expansion of the military's new role, as defined by the
doctrine, took relatively benign forms: nation building and civic action—
programs to help develop physical and human infrastructure, supposedly
in areas where the civil government's and the private sector's efforts were
inadequate. More threatening were the expansion of military intelligence
into the domestic arena and the possibility of the armed forces taking over
ordinary police functions. The stage was set for a qualitatively and quan-
titatively different sort of military political involvement.

The militarization of politics did not emerge immediately. Initially, the
altered threat perception gave impetus to such regionwide efforts as the
Alliance for Progress (meant to address underlying social, economic, and
political problems), as well as U.S.-induced and indigenous efforts to re-
direct military attention to the internal guerrilla threat. But as the alliance
and other civilian reform efforts faltered, military attention became more
fixed on the internal threat. Thus, it was not surprising that in the 1960s,
another cycle of military governments arose throughout the region.
THE NATIONAL SECURITY STATE

As Thomas D’Agostino showed in Chapter 4, most of the governments during this cycle were strikingly different from those in prior periods of military rule. Previously, the armed forces had functioned as moderators. Their direct interventions were usually relatively brief and did not involve them as an institution assuming civilian administrative functions. Except at the most senior levels, military personnel tended to remain in military posts. Even long-term military presidents normally left active duty and developed civilian support as a foundation of their governments.

The national security doctrine changed all this. The new bureaucratic authoritarian national security state was meant to do something other than repair and reestablish the political status quo. Military governments assumed the mission of reforming the underlying social, economic, and political structure that had been the source of instability. Thus, the military took on a new “ruler” role that rested on the national security doctrine, as well as on the well-established tradition of military intervention. The watershed between the old and new patterns of the military was stark. Before the 1964 Brazilian coup, in almost every country the armed forces played the more limited moderator role, whereas almost every intervention after the coup established military governments with much broader aspirations. These new governments generally went through a number of phases. The first was a stabilization phase that generally took about a year. Coups were normally induced by a variety of problems: subversive violence, political deadlock, economic difficulties, and threats to the viability of the armed forces. Stabilization was meant to suppress these threats. Coups frequently led to a political recession; the abrogation of political guarantees, the closing of congress, and the banning of certain individuals and political parties. Military interventions took control of key civilian institutions. Security was tightened. Frequently, subversives or suspects were detained without trial, exiled, and sometimes executed. When open combat occurred, the armed forces often assumed direct control of the civilian population, establishing curfews and sometimes moving entire villages and enlisting civilians in part-time paramilitary units. In almost all instances, armed resistance was either negligible or quickly collapsed. In the economic realm, governments took steps to control strikes and inflation through stern fiscal measures.

As the initial crisis faded, the military government could turn to the second phase—constructing new institutions. If the country were to become economically progressive and politically stable, new social, economic, and political habits had to be developed. This phase was never more than adumbrated by military doctrine, and the task of creating new institutions was much more complex than simply seizing power and imposing order. Militaries in various countries took different approaches, but a number of common themes emerged. The executive branch of the government had to be strengthened. Political participation had to be restructured to prevent uncontrolled mass mobilizations and the undue influence of special-interest pleading. Patriotism and duty were to be the dominant ideological themes; class struggle as a rallying point had to be eliminated. The economy needed to be modernized to produce dynamic rates of growth. Institutional capacity to prevent and contain social turmoil was essential.

Yet by the beginning of the 1980s—and in certain countries even earlier—when the construction of new institutions was far from complete, many military-sponsored reforms had miscarried. In addition, the armed forces’ authoritarian rule had provoked widespread opposition, often involving such mainline sectors as the church, professionals, and segments of the business community. Moreover, the effort at national reconstruction eventually enmeshed the armed forces in a host of issues with which they were unfamiliar and that engendered factionalism within the institution. It was time for a strategic retreat.

Thus, in most countries the last phase of military government—transition to civilian successors—did not proceed as the armed forces had originally anticipated. The transfer of power was meant to maintain the achievements of the military regimes, including a major domestic role for the armed forces. It was to have been a gradually and carefully orchestrated process.
In actual practice, however, these transfers were driven to a greater or lesser degree by popular pressure and factions within the armed forces. Patterns varied from country to country. Transitions ranged from forced exit to military-dominated transfer. The best example of the former is the Argentine military's exit from power in December 1983, which was spurred by the disastrous Falklands/Malvinas War eighteen months earlier. The prestige of the military was at an all-time low, and the government’s amnesty law was revoked by its civilian successors.

The most nearly successful military-staged transition was that in Chile, where the military-inspired 1980 constitution provided the vehicle for installing a new regime. Even in Chile, however, the transition did not go exactly as scripted. The military junta had hoped to have a single regime-nominated candidate (the incumbent, General Augusto Pinochet) approved by the voters. In October 1988, however, the “no” vote against Pinochet gained the majority, and the regime was forced to use its fallback mechanism: a competitive election. In this contest, held a year later, pre-regime candidates lost as well. Nonetheless, the military’s constitution largely held against popular pressure to change it. The military retained most of its prerogatives as spelled out in the document, including appointed senators, an additional eight-year term for incumbent service chiefs, and a fixed portion of the gross domestic product (GDP) for the military budget.

THE POSTNATIONAL SECURITY STATE

Real Change, or the Same Old Thing?

The armed forces have not disappeared and still possess considerable political influence. Even in Argentina, where the armed forces suffered their greatest loss of power and prestige, there has been no serious consideration of eliminating them or even of systematically purging the institution. In fact, the attempt to punish those guilty of the most heinous human rights abuses during the Dirty War (nine thousand extrajudicial killings of those in military custody) eventually collapsed after a series of military revolts. In short, the armed forces, even in their generally diminished political position, retain some capacity to challenge civilian governments.

The national security state is dead, but a postnational security state has emerged. In this new political environment, issues from the past—some as old as the Iberian tradition, some associated with the national security doctrine—remain on the Latin American political agenda along with new issues that have emerged in the post—Cold War era. Can the armed forces be democratized and subordinated to civilian authority? Can military tendencies toward political intervention be contained and eroded? In light of the kind of transformation required, actual constitutional amendments are essentially symbolic and peripheral. These issues are more far-reaching than simply amending the language of written documents; they entail changing deep-seated practices and attitudes.

Advanced democracies have relied on a number of methods to protect against military authoritarianism. Among the most important of these is cultivating the norm of apolitical professionalism both within the military's own ranks and in the broader political community. Such professionalism grants the armed forces a significant degree of autonomy but only within a rather narrowly defined field of competence. Military autonomy is generally limited to matters of organization and tactics, and decisions concerning missions and overall funding are the province of civilian policymakers. On such matters of high-level military policy, the senior officers are competent to give advice, but this advice alone does not determine policy. On all other matters of policy, military opinion is irrelevant or, more accurately, professional military opinion is, by definition, nonexistent.

Apolitical professionalism is clearly out of step with the Latin American tradition of military involvement in politics. Its adoption would mean the loss of the armed forces’ status as an institutional balance. Such professionalism would require altering military codes that hitherto secured a special legal status for the armed forces. It would subject individual officers to civilian courts and would largely deprive them of the legal defense of “due obedience” (following orders). It would lead to the abandonment of the new professionalism’s claim that the armed forces have a broad professional competence in developmental and internal security matters. It would undermine their role as managers and administrators in a host of governmental and quasi-governmental institutions that are only loosely connected to military competency as that term is narrowly understood.

Is such a change possible? Even though nearly every newly reestablished civilian government has favored the adoption of standards of apolitical professionalism, and virtually every Latin American military force has announced that the armed forces are essentially nonliberative, history would counsel caution. Latin American civilian governments have rarely succeeded in obtaining full control over the armed forces except in a revolutionary context, for only in such circumstances could the military institution be completely purged and restructured or even abolished. The development of a military ethos, however, whether apolitical or highly professionalized, depends in large measure on the context in which the military organization operates. Professional military officers (trained, commissioned, and promoted within a bureaucratic system designed to manage the instruments of modern warfare) generally have two apparently contradictory attitudes: conservatism and a distaste for politics. They tend to be conservative because they are—by temperament and training—extremely nationalistic, skeptical of idealistic projects, alarmist, and believers in the
necessity of force to settle conflicts. Yet they also find the naked self-interest, compromise, and bargaining of politics distasteful because such traits conflict with the technical, engineerlike approach to problems that typifies the military professional. Hence, in stable regimes with no overriding constitutional conflicts that adversely affect the ability of the government to actually govern, a well-established professional ethos leads to an apolitical armed forces. In the face of sensitive ideological and constitutional crises, the armed forces’ inherent conservatism kicks in. They are apt to make their presence felt in promoting authoritarian and nationalistic solutions to the country’s problems.

In Latin America, the professionalization of the armed forces that began a century ago has never produced an apolitical force. Endemic political and social conflict has been sufficiently severe to induce repeated military involvement in politics. Yet in the 1990s, Latin American circumstances have changed. The experience of the national security state has taught all parties about the limits of military competence, the dysfunctional nature of revolutionary and counterrevolutionary violence, and the value of the rule of law. Yet problems remain.

### Human Rights

During and sometimes immediately preceding military rule, the armed forces of many countries fought what they believed was an ideological war of national survival. To be fair, in most instances the threat of violent subversion was real, if exaggerated, and widespread support or tolerance often existed for the military’s action at the time it was undertaken. Yet in many instances the military’s prosecution of such wars involved glaring human rights violations. Acts of torture, murder, rape, and detention violated both national and international law, and in some cases they occurred on a massive scale. Yet the armed forces feel their actions were absolutely necessary for the defense of the nation and remain unpunited. They argue that the guerrillas and their allies were, in effect, foreign agents (combatants operating without legal belligerency or internationally required insignia and uniforms) and hence were outside the protection of the law. The military view rights trials as attempts by subversives to carry on wars by other means.

Foreseeing potential legal sanctions, military governments often tried to assure themselves of an amnesty before the transfer of power to civilians. Perhaps the most successful of these attempts has been the de facto understanding in Brazil that has made prosecution of rights violations largely a nonissue. Legal amnesties in Argentina, Chile, and Uruguay have been challenged, but only in Chile was the issue ongoing as late as mid-1994. An amnesty law passed in El Salvador in 1993 is also likely to hold.

In mid-1996 the rights issue in Guatemala and Peru was still largely unresolved, despite some detentions.

Human rights issues pose a dilemma for civilian governments. If they ignore past violations, they risk creating a precedent for impunity that the armed forces or police could use to suppress civil commotion (a real possibility but still important avenue for military intervention). Moreover, admitting guilt as a sign that the government was not serious about establishing stable regimes with no military rule. On the other hand, if civilian governments attempt to risk serious consequences as well. The armed forces have ample means to make the government pay a high price for its efforts, ranging from lobbying and reliance on right-wing political allies to outright revolts. Thus, armed forces resist efforts, and to require the expenditure of a good deal of political capital.

In Argentina, Raúl Alfonsín’s attempt to escape this dilemma during the mid-1980s founded. President Alfonsín tried to distinguish between the military as a necessary and valued institution and individual officers who had committed heinous crimes. Nonetheless, he could not induce the armed forces to prosecute their own members, nor could he convince them of the validity of his distinction. Three military revolts were each followed by embarrassing government backdowns that seemed to indicate that the armed forces had won. Chile’s Truth and Reconciliation Commission, established by the new civilian administration of Patricio Aylwin in 1990, was another attempt to find some sort of middle ground, but here too the main opposition was opposed to any rights prosecutions—although a number of the wealthiest members were tried. Yet in 1993, El Salvador established a similar commission, the result of the peace agreement that ended the war between the government and leftist rebels, and the government provided amnesty.

Although hardly a perfect fulfillment of national and international legal obligations, such half measures buttress, however imperfectly, the idea that future violations may carry significant risks. Moreover, the success costs for the armed forces themselves. Military intransigence over the rights issue in Argentina cost the institution prestige, deprived it of financial resources, and sapped its will to resist reform in other areas.

### Other Opportunities and Threats

Most civilian governments appear to realize the need to undertake military reform, although they have not been uniform in their efforts to do so. There is no “silver bullet” to solve the problems involved in establishing effective democratic control of the military and securing the rule of law.
Yet a number of changes have merit and require persistent oversight. The military code of justice should be reformed to remove the concept of due obedience and should establish in its place the principle that each soldier is responsible for obeying the law. Due obedience should be a mitigating rather than an exculpating argument.

Civilians should no longer seek out the military during times of political crisis in an effort to promote a coup. And in a lesser but related matter, civilian presidents must not rely on the armed forces as a substitute for civilian legal and administrative capacity. The first temptation, although it has not disappeared entirely, was more characteristic of the past than the present, but the second—reliance on the armed forces for political and administrative support—is troublingly contemporary.

Although the specific causes for the second phenomenon are diverse, they fall under two main headings. First, the armed forces often want to retain at least a veto power over significant government policies outside the military sphere as strictly defined or even seek to expand their role. The administration of state companies, civil construction, and environment management is a source of jobs for military officers and a reason to expand the military budget. A second impulse toward overreliance on the armed forces comes from the other direction. Military leaders may seek military officers to appoint to cabinet and other high-level positions.

Latin American political parties are frequently factional and ill-disciplined, and civilians may be more interested in dispensing patronage and preparing for the next election than they are in efficient administration. In such instances, a president with dubious popularity and legislative support may do well, as was the case with Brazil’s Itamar Franco in the last year of his interim presidency, to appoint military officers to his cabinet rather than civilian politicians and business-based experts, whom Franco labeled “birds of prey.” In contrast to their civilian counterparts, military officers often seem more committed to strengthening the executive branch and achieving administrative efficiency and to be less prone to the worst aspects of interest-group politics.

Such reliance on the armed forces, however, involves very real dangers. The use of military officers in governmental posts in which civilians should have adequate expertise stifles democratic development, provides a military filter on the advice and information the president receives, and positions the armed forces to support an autogolpe (self-coup: an executive maneuver, supported by the military, that suspends the operation of the legislature and the courts). This is the most likely route the armed forces will follow if they are to assume power again. In April 1992, President Alberto Fujimori of Peru successfully used such a move in the context of an ongoing guerrilla war and economic crisis. Pressure from the international community forced a partial retreat, and Peru held elections for a new constituent assembly/legislature by the end of the year. In June 1993, President Jorge Serrano of Guatemala tried the same procedure. In the Guatemalan case, however, political protests forced Serrano’s resignation, and human rights ombudsman Raúl de León Carpio was elected by the legislature to fill the vacated presidential chair.

Both Peru and Guatemala illustrate the current posture of the armed forces high command in many other countries as well. Military leaders are unwilling to take the lead in an outright coup in which all three branches of government would come under military supervision or be replaced, but they are deeply concerned about the maintenance of law and order and the so-called governability problem.

Political deadlock, the fiscal and administrative collapse of the state, widespread outbreaks of popular disorder, or worse threaten most Latin American countries to at least some degree in the 1990s. Whether the armed forces co-opt the president or the president co-opts them is largely irrelevant. The dynamics of executive dictatorships are not conducive to democratic development. When a similar self-coup occurred in Uruguay in 1973, the government felt impelled to be increasingly repressive and exclusionary until finally the civilian president was replaced with a general. There is a compelling need to restrict the sphere of military activity to areas in which its organization and expertise are essential and do not threaten democracy. Military skills, which are useful and necessary in dealing with defense matters, are often inappropriate in other fields. Thus, appointing generals to civilian posts is clearly a move in the wrong direction.

Rather than militarize civil administrations to consolidate democracy, governments need to civilianize the upper levels of the military bureaucracy. This task is politically and technically delicate. No strict dividing line exists between responsibilities that are properly purely military and those that are simply a matter of the discretion of the civilian political leadership. Rather, various sorts of activities each have a particular balance of civilian and military responsibility. The development of tactics, training, promotion, and internal discipline are largely—but not exclusively—matters of military concern. Budgets, procurement of strategic weapons, the defining of military missions, and matters of war and peace are fundamentally the concern of civilians—although sound military advice is important.

Establishing civilian control requires the appointment of civilians to the post of defense minister and other senior-level positions and the establishment of legislative oversight committees. But at least as important is the development of civilian expertise in defense matters. Civilian bosses must be capable of evaluating the advice of their nominal military subordinates. Political leaders, academicians, and others must be able to engage in a technical dialogue with military officers. Without adequate knowledge, civilians will find it difficult to gain meaningful control over and real respect from, the armed forces.
Regardless of who actually controls the armed forces, civilians or uniformed officers, these authorities have to decide what the military's purpose is. This is no longer as obvious as it once was, because global and regional developments have radically undermined old assumptions. The 1980s witnessed the end of the national security state and the disappearance of revolutionary communism as a major ideological force. Thus, the collapse of the Soviet Union in 1991 capped a series of events that rendered obsolete most of the Cold War and pre-Cold War missions that for decades had been integral to military planning in the Americas.

**Defense Against External Aggression**

One of the primary, if not the primary, missions of any state's military forces is the territorial defense of the country against external attack. Over the course of more than a century and a half of independent statehood, this mission has changed considerably in Latin American countries, although national security doctrine—domestic intelligence, civic action, and direct control of the population—are of more recent vintage and are more controversial. Latin American states are attempting to strike a balance between restricting the armed forces entirely to external defense or simply allowing them to participate in internal defense and development operations in an unrestricted fashion. Civilian governments have begun to address a variety of issues through constitutional change, statute, or decree. Modern states need some type of mechanism to defend themselves and their citizens against those who would engage in political violence: bombings, assassinations, kidnappings, and other common crimes that have political motivations. Latin America has not been immune from such outbreaks. The task is to protect the government and society without degenerating into a police state. Yet the military, or police, lacks the capacity for significant force projection into the Western Hemisphere. Its existence, however, did provide a pretext for defense spending and equipment acquisition.

The hypothesis of a major imminent external threat was further undermined by the movement toward regional integration begun in the mid-1980s by newly returned civilian regimes. Economic and diplomatic cooperation became the watchword, and it made little sense to maintain the fiction that a country was threatened by a major conventional cross-border attack. Hence, a number of prestigious military projects—most notably the nuclear weapons programs of Brazil and Argentina—came into question. Why maintain large forces, a mobilization base, and research and development programs for technologically advanced weaponry if national security could not justify the cost? It has taken time, however, for logics to erode bureaucratic and intellectual inertia. Prestigious projects are always hard to give up. Decreasing the size of military forces and changing their missions wreak havoc with the established career patterns and powerful institutional interests. Moreover, geopolitical is popular with military intellectuals. It propounds the notion that international politics is the struggle between states for territory and that states function as quasi-living organisms in this Darwinistic survival of the fittest. War, or at least preparation for war, with neighboring states is the natural and sensible order of things. Yet the military has gradually shifted emphasis away from war preparation and has cut the size of its forces, although this downsizing is more a result of financial exigency than of clearly thought-out arguments or an explicit rejection of geopolitics.

**Domestic Intelligence and Development**

The traditional activities involved in internal defense—frontier security, the imposition of order in remote areas, and the use of the military to supplement police forces in times of internal disturbance—have their roots in preindependence times. The activities associated with the national security doctrine—domestic intelligence, civic action, and direct control of the population—are of more recent vintage and are more controversial. Latin American states are attempting to strike a balance between restricting the armed forces entirely to external defense or simply allowing them to participate in internal defense and development operations in an unrestricted fashion. Civilian governments have begun to address a variety of issues through constitutional change, statute, or decree. Modern states need some type of mechanism to defend themselves and their citizens against those who would engage in political violence: bombings, assassinations, kidnappings, and other common crimes that have political motivations. Latin America has not been immune from such outbreaks. The task is to protect the government and society without degenerating into a police state. Yet the military, or police, lacked the capacity for significant force projection into the Western Hemisphere. Its existence, however, did provide a pretext for defense spending and equipment acquisition.

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in areas tangentially related to their primary competence is still controversial. This controversy stems from a number of sources. One source is a kind of guilt by association of civic action with the national security doctrine, which (along with counterinsurgency strategy generally) considers the participation of military forces in projects to directly benefit the population as part of an integrated strategy. Civic action projects — such as construction of basic public facilities (especially in rural areas), immunization campaigns, and the distribution of relief supplies and other materials that immediately benefit the population — are adjuncts to repressive measures directed against guerrillas and other subversives. In the context of counterinsurgency strategy, such activities are meant to win support for the government and to indirectly promote the gathering of intelligence information.

In peacetime, such activities have been justified by the inability of civilian agencies or the private sector to provide such services. Yet civic action projects have been criticized for that very reason: They tend to displace civilians from technical and administrative activities that are essentially civilian in nature. Why should the armed forces, rather than the public health service, provide immunizations? Why should military engineers construct rural roads, schools, and wells rather than other government agencies working through the private sector? Why should disaster relief and activities to preserve the environment (a new mission that is popular with some militaries) be a military mission when civilian government agencies can be reformed and restructured to handle these tasks?

An even more disturbing consequence is political displacement. Patronage is a staple of electoral politics. Leaders who deliver benefits to people are often able to deliver their votes as well. Both North American ward heelers and Latin American caciques (local political bosses) have always understood this. What happens to the prospects for party development and democratic consolidation if the local military commander is seen as a powerful patron?

Peacekeeping

With the end of the Cold War, seventy thousand troops have been deployed on peacekeeping missions under UN auspices. The use of UN "blue helmets" is no longer restricted to areas of limited superpower competition as it was during the Cold War. Today, restrictions on such deployment are based essentially on cost-benefit analysis rather than on ideological considerations. This changed environment has provided an increased opportunity for Latin American countries to participate in peacekeeping, and many have seized that opportunity.

Troops from Argentina, Brazil, Chile, Uruguay, and Venezuela have participated in operations in such places as Cambodia, the Persian Gulf, Iraq, El Salvador, Mozambique, Cyprus, and Croatia. Such participation provides more than UN financial support; it provides actual operational experience with multinational forces, some of whose elements come from sorely lacking for most Latin American armies. These operations can also help induce change in the military's traditional culture. Argentina's army chief of staff noted in an interview that military involvement in drug trafficking was not unknown in Latin America during the 1980s.

Counternarcotics Operations

Another nontraditional mission that has recently come into vogue, at least in the United States, is counternarcotics operations. Such operations involve the armed forces in surveillance and interdiction of drug shipments, their precursors, and chemicals needed for processing. Additionally, the armed forces are asked to destroy drug laboratories and possibly coca and poppy plants used for the production of drugs. In the late 1980s, the Bush administration felt military involvement in these endeavors was part of a comprehensive war on drugs. The military seemed suited for the mission because it had personnel and technology that could be useful in the anticocaine effort.

Many Latin American governments and armed forces were less sure. Employing the armed forces in the counternarcotics struggle threatened to reduce the status of military officers. Given global conditions after the end of the Cold War, Latin American militaries were looking for advanced military missions rather than ones that seemed to confuse their role with that of the police. Civilian governments, wary of the dangers of military role expansion, were often less than enthusiastic as well. Moreover, the temptation of corruption, when traffickers could offer bribes that far exceeded military pay, threatened the institution's integrity. After all, large-scale military involvement in drug trafficking was not unknown in Latin America during the 1980s.

Nonetheless, at times the United States was able to offer significant inducements. Little U.S. military assistance was available to Latin American countries, but the sophisticated radars and sensors necessary for part of the effort held appeal. In addition, in the case of the crop for Colombia-based drug cartels, the United States tied economic aid to the fulfillment of national coca-eradication targets.
Thus, in Peru the armed forces became heavily involved in counternarcotics operations, although not without cost. During the high point of the struggle against Sendero Luminoso guerrillas in the late 1980s, counter-drug operations threatened to undermine efforts to win over the coca-growing peasantry. And the influence of drug money was corrosive. In mid-1994, the commander in chief of the armed forces announced that one hundred officers were being tried for involvement in the drug trade. In Bolivia, most of the antidrug efforts had been carried out by a special civilian force rather than the army. In other countries in South America, the military’s involvement has been more marginal and has been more or less an adjunct to the control of frontiers in remote areas.

**CONCLUSION**

Although present-day Latin American armed forces—like every long-standing institution—are influenced by the past, by the mid-1990s they had passed a watershed. The military, which for centuries had been a key pillar of authoritarianism, is changing as a result of a changed regional and global context.

The national security state of the 1960s through the 1980s represented the culmination of a number of trends in the evolution of Latin American military institutions. It was authoritarian and statist and stressed traditional values, as had the Latin American armed forces since the time of the conquest. It was modernizing, technocratic, and meritocratic, as the professional armed forces of the region had been—at least in aspiration—since the turn of the century.

But the national security state could not last. It lacked a distinctive ideology to legitimize its institutions. And in fact, it proclaimed itself to be transitional. Where it achieved a modicum of success (e.g., Chile), the regime’s own rules provided the basis for a transfer to the opposition. Where it was an almost unqualified failure (e.g., Argentina), the experience of the national security state delegitimized military governance almost everywhere.

Moreover, the political and social environment of the mid-1990s differs substantially from that of the mid-1960s—when the national security state first arose—and new issues have emerged. The experience of repression has made the left realize the importance of competitive elections and due process. The end of the Cold War has resulted in muted ideological competition. The failure of state socialism globally, as well as the founding of state-led development in Latin America, has both narrowed policy options and made Latin American countries more susceptible and receptive to international influence.

The armed forces themselves fit into this general pattern. To be modern and professional means to follow Western European and North American advanced, highly mobile, and capable of joint (air, land, and sea) operations but also nondeliberative, obedient, and apolitical. The need to modernize, professionalize, and restructure the military is clear to both civilian and military leaders.

This is not to say the process of reform is easy and free of contention. The potential for social turmoil continues to provide a pretext for armed forces in some countries (Venezuela, Peru, and, during the late 1980s, Argentina) have openly divided into factions over the issue of military roles has yet to be ironed out and, more important, sincerely accepted by the armed forces. Nonetheless, the balance of the evidence indicates that the armed forces in Latin America will participate in an era of democratic consolidation.

**BIBLIOGRAPHY**


