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MEXICO'S OUT-OF-CONTROL CRIMINAL MARKET

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EXECUTIVE SUMMARY

- This paper explores the trends, characteristics, and changes in the Mexican criminal market, in response to internal changes, government policies, and external factors. It explores the nature of violence and criminality, the behavior of criminal groups, and the effects of government responses.
- Over the past two decades, criminal violence in Mexico has become highly intense, diversified, and popularized, while the deterrence capacity of Mexican law enforcement remains critically low. The outcome is an ever more complex, multipolar, and out-of-control criminal market that generates deleterious effects on Mexican society and makes it highly challenging for the Mexican state to respond effectively.
- Successive Mexican administrations have failed to sustainably reduce homicides and other violent crimes. Critically, the Mexican government has failed to rebalance power in the triangular relationship between the state, criminal groups, and society, while the Mexican population has soured on the anti-cartel project.
- Since 2000, Mexico has experienced extraordinarily high drug- and crime-related violence, with the murder rate in 2017 and again in 2018 breaking previous records.
- The fragmentation of Mexican criminal groups is both a purposeful and inadvertent effect of high-value targeting, which is a problematic strategy because criminal groups can replace fallen leaders more easily than insurgent or terrorist groups. The policy also disrupts leadership succession, giving rise to intense internal competition and increasingly younger leaders who lack leadership skills and feel the need to prove themselves through violence.
- Focusing on the middle layer of criminal groups prevents such an easy and violent regeneration of the leadership. But the Mexican government remains

deeply challenged in middle-layer targeting due to a lack of tactical and strategic intelligence arising from corruption among Mexican law enforcement and political pressures that makes it difficult to invest the necessary time to conduct thorough investigations.

- In the absence of more effective state presence and rule of law, the fragmentation of Mexican criminal groups turned a multipolar criminal market of 2006 into an ever more complex multipolar criminal market. Criminal groups lack clarity about the balance of power among them, tempting them to take over one another's territory and engage in internecine warfare.
- The Mexican crime market's proclivity toward violence is exacerbated by the government's inability to weed out the most violent criminal groups and send a strong message that they will be prioritized in targeting.
- The message has not yet sunk in that violence and aggressiveness do not pay. For example, the destruction of the Zetas has been followed by the empowerment of the equally aggressive *Cártel de Jalisco Nueva Generación* (CJNG). Like the Zetas, the Jalisco group centers its rule on brutality, brazenness, and aggressiveness. Like the Zetas and unlike the Sinaloa Cartel, the CJNG does not invest in and provide socio-economic goods and governance in order to build up political capital.
- Equally, the internal rebalancing among criminal groups has failed to weed out the most violent groups and the policy measures of the Mexican governments have failed to reduce the criminal groups' proclivity toward aggression and violence.
- The emergence of the CJNG has engulfed Mexico and other supply-chain countries, such as Colombia, in its war with the Sinaloa Cartel.
- The war between the Sinaloa Cartel and CJNG provides space for local criminal upstarts, compounds instability by shifting local alliances, and sets off new splintering within the two large cartels and among their local proxies.
- To the extent that violence has abated in particular locales, the de-escalation has primarily reflected a "narcopeace," with one criminal group able to establish control over a particular territory and its corruption networks. It is thus vulnerable to criminal groups' actions as well as to high-value targeting of top drug traffickers.
- In places such as Ciudad Juárez, Tijuana, and Monterrey, local law enforcement and anti-crime socio-economic policies helped in various degrees to reduce violence. When the narcopeace was undermined, the policies proved insufficient. At other times, the reduction of violence that accompanied a local narcopeace gave rise to policy complacency and diminished resources.
- Socio-economic policies to combat crime have spread resources too thinly across Mexico to be effective.
- Violence in Mexico has become diversified over the past decade, with drug trafficking groups becoming involved in widespread extortion of legal businesses, kidnapping, illegal logging, illegal fishing, and smuggling of migrants. That is partially a consequence of the fragmentation, as smaller groups are compelled to branch out into a variety of criminal enterprises. But for larger groups, extortion of large segments of society is not merely a source of money, but also of authority.

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- Violence and criminality have also become “popularized,” both in terms of the sheer number of actors and also the *types* of actors involved, such as “anti-crime” militias.
- Widespread criminality increases the coercive credibility of individual criminals and small groups, while hiding their identities. Low effective prosecution rates and widespread impunity tempt many individuals who would otherwise be law-abiding citizens to participate in crime.
- Anti-crime militias that have emerged in Mexico have rarely reduced violence in a sustained way. Often, they engage in various forms of criminality, including homicides, extortion, and human rights abuses against local residents, and they undermine the authority of the state.
- Government responses to the militias—including acquiescence, arrests, and efforts to roll them into state paramilitary forces—have not had a significant impact.
- In fact, the strength and emergence of militia groups in places such as Michoacán and Guerrero reflect a long-standing absence of the government, underdevelopment, militarization, and abuse of political power.
- In places such as Guerrero, criminality and militia formation has become intertwined with the U.S. opioid epidemic that has stimulated the expansion of poppy cultivation in Mexico.
- The over-prescription of opioids in the United States created a major addiction epidemic, with users turning to illegal alternatives when they were eventually cut off from prescription drugs. Predictably, poppy cultivation shot up in Mexico, reaching some 30,000 hectares in 2017.
- Areas of poppy cultivation are hotly contested among Mexican drug trafficking groups, with their infighting intensely exacerbating the insecurity of poor and marginalized poppy farmers.
- Efforts to eradicate poppy cultivation have often failed to sustainably reduce illicit crop cultivation and complicated policies to pacify these areas, often thrusting poppy farmers deeper into the hands of criminal groups that sponsor and protect the cultivation.
- Eradication is easier than providing poppy farmers with alternative livelihoods. Combined with the Trump administration’s demands for eradication, the Enrique Peña Nieto administration, and Mexico historically, showed little interest in seriously pursuing a different path.
- Poppy eradication in Mexico does not shrink the supply of illegal opioids destined for the U.S. market, since farmers replant poppies after eradication and can always shift areas of production.
- The rise of fentanyl abuse in the United States, however, has suppressed opium prices in Mexico. Drug trafficking organizations and dealers prefer to traffic and sell fentanyl, mostly supplied to the United States from China, because of its bulk-potency-profit ratio.

- The CJNG became a pioneer in fentanyl smuggling through Mexico into the United States, but the Sinaloa Cartel rapidly developed its own fentanyl supply chain. Although the drug is deadly, the Sinaloa Cartel's means of distribution remain non-violent in the United States. Fentanyl enters the United States from Mexico through legal ports of entry.
- In the short term, fentanyl has not altered the dynamics of Mexico's criminal market, but in the long term, fentanyl can significantly upend global drug markets and the prioritization of drug control in U.S. agendas with other countries. If many users switch to synthetic drugs, the United States may lose interest in promoting eradication of drug crops. Such a switch would also weaken the power of criminal and insurgent groups who sponsor illicit crop cultivation. Even if they switch to the production of synthetic drugs, they will only have the capacity to sponsor the livelihoods of many fewer people, thus diminishing their political capital with local populations and making it less costly for the government to conduct counternarcotics operations.
- Mexico's violence can decline in two ways. First, a criminal group can temporarily win enough turf and establish enough deterrence capacity to create a narcopeace, as has been the case so far. Alternatively, violence can decline when the state at last systematically builds up enough deterrence capacity against the criminals and realigns local populations with the state, from which they are now often alienated. Mexico must strive to achieve this objective.

INTRODUCTION

Over the past decade, Mexico has experienced extraordinarily high drug- and crime-related violence. In 2017, the murder rate broke Mexican records, with at least 25,339 murder incidents and some 31,000 murdered individuals.¹ In 2018, the tally was even greater, with 33,341 homicides registered.² The violence continued unrelentingly at the beginning of 2019, with record monthly homicide levels for January and February. Successive Mexican administrations have failed to reduce homicides and extortion in a sustained way. The fragmentation of Mexican criminal groups, both a purposeful and inadvertent effect of Mexican anti-crime policies such as high-value targeting, is one crucial cause. To the extent that violence has abated in particular locales, the de-escalation has primarily reflected a “narcopeace,”³ with a criminal group able to establish control over a particular territory and its corruption networks, so as to deter challengers and prevent violent contestation with rivals by engaging in negotiations among criminal groups.

Furthermore, violence has become diversified over the past decade, with drug trafficking groups becoming involved in widespread extortion of legal businesses, kidnapping, illegal logging, illegal fishing, and smuggling of migrants. Violence and criminality have also become “popularized,” both in terms of the sheer number of actors and also the types of actors involved. Those involved in the criminal activity have come to include not just small start-up criminal ventures, but also “anti-crime” militias and even university students trying to extort their fellow students. This diversification and popularization of violence have in turn created a widespread atmosphere of fear and intimidation.

The outcome is an ever more complex, multipolar, and out-of-control criminal market in Mexico that generates deleterious effects on Mexican society and makes it highly challenging for the Mexican state to respond effectively.

The Mexican government has failed to rebalance power in the triangular relationship between the state, criminal groups, and society. In responding to criminal violence, the objectives of the state should be to:

- a. weaken the power and authority that criminal groups exercise over local populations;
- b. strengthen the state's bonds with society; and
- c. increase the state's power not only to incapacitate criminal groups, but crucially, to deter their resort to violence through effective police and justice system reform.⁴

Yet after almost two decades of bloody carnage, these goals remain elusive. In fact, achieving them is further away than in 2006 when President Felipe Calderón embarked on the war against the cartels. Instead, due to the unabating and spreading violence and persisting corruption of the Mexican state and institutions, Mexican society has soured on the anti-cartel project.

Consequently, the rebalancing of power has taken place largely within the criminal market and among the criminal groups. This outcome is highly unsatisfactory for two reasons: First, the narcopeace arrangements remain at the mercy of criminal groups and continue to be vulnerable to the Mexican government's policy of high-value targeting of top drug traffickers. Second, the rebalancing among criminal groups has failed to weed out the most violent groups and reduce their proclivity toward aggression.

This bodes poorly for violence reduction in Mexico over the next six years—even under the new security policy of Andrés Manuel López Obrador (known as AMLO), which is analyzed in detail in the companion paper, “AMLO's security policy: Creative ideas, tough reality.”⁵

The U.S. opioid epidemic and the subsequent increase of poppy cultivation in Mexico are further complicating developments. The Trump administration's prioritization of suppressing poppy cultivation in U.S.-Mexico anti-crime cooperation diverts attention and effort away from Mexico's more fundamental problems of criminal violence and weak deterrence capacity of the state. Worse, criminal groups are able to accumulate political capital among local populations by protecting poppy fields from eradication. The spread of fentanyl and synthetic drugs overall can fundamentally upend drug markets around the world and diminish the prominence of drug eradication efforts in U.S. foreign policy. In the short term, however, the rise of synthetic drugs, such as fentanyl, has come to preoccupy U.S. counterdrug policies, including with Mexico.

Finally, the pernicious formation of anti-crime militias in Mexico, and their proclivity to become involved in crime themselves, poses a further difficult challenge for reducing violence and crime in Mexico and strengthening rule of law.

The following paper details key trends in Mexico's criminal markets since 2006. It analyzes how and why violence in Mexico has intensified and become more complex through the fragmentation of drug trafficking groups within a pre-existing multipolar criminal market, the use of high-value targeting, and weak deterrence of Mexican law enforcement agencies. It also discusses why the emergence of the *Cártel de Jalisco Nueva Generación* (CJNG) does not present a fundamental reversal of the trend toward fragmentation and why it will not result in violence reduction, instead engulfing Mexico and other supply-chain countries, such as Colombia, in a war between CJNG and the

Sinaloa Cartel. This has been primarily due to the failure to weed out the most violent groups and deter aggression, and also the ephemeral nature of narcopeace as a result of ill-conceived targeting policies.

The paper subsequently analyzes the diversification of the economic portfolio of criminal groups in Mexico, and the accompanying expansion of their political capital and authority. It also explores the “popularization” of violence in Mexico, through the participation of greater numbers of groups and individuals, and the formation of anti-crime militias. The section on militias further explores their effects on formal political authority, the political capital of nonstate actors, and the tendency of militias, whatever their origins and ostensible goals, to succumb to criminality. The expansion of poppy cultivation in Mexico, sometimes intertwined with militia formation but principally stimulated by the U.S. opioid epidemic, and the effects of poppy eradication are examined next. The last analytical section discusses the rise of synthetic opioids, including fentanyl; the roles of China, India, and Mexico in supplying synthetic opioids to the United States; and the implications for global drug markets and U.S.-Mexico policy.

The accompanying paper, “AMLO’s security policy: Creative ideas, tough reality,” lays out the announced security strategy of the AMLO administration, analyzes in detail how each of its eight pillars corresponds to crime trends in Mexico, and provides policy recommendations.

CRIME TRENDS IN MEXICO FROM 2006 THROUGH 2018

Despite—and often as an inadvertent consequence of—Mexico’s anti-crime efforts over the past 12 years, crime trends in Mexico have been mostly ominous. By and large, criminal violence has intensified and become more widespread geographically and functionally, now permeating many types of illegal and legal economies in Mexico.

The intensity of the violence

Some 31,000 people were killed Mexico in 2017, making it the bloodiest year on record since 1997.⁶ Even more people, 33,341, were killed in Mexico in 2018.⁷ The statistics expose the ineffectiveness of the Mexican government’s anti-crime policies and the inexcusable neglect of the Enrique Peña Nieto administration toward the public safety crisis.⁸ Since the war on the cartels started in 2006, more than 200,000 have died and an estimated 37,000 have disappeared.⁹

The intensity of the violence—in absolute numbers, in homicides rates of 20 to 25 per 100,000, in the operational tempo of aggressive actions by criminal groups, and in the visibility and brazenness of violence—has often surpassed that of insurgencies or civil wars. Mexico’s violence stands out among drug and crime markets in the world, even among the unusually violent drug and crime markets in Latin America.¹⁰ In contrast, drug smuggling groups in East Asia (as well as in Western Europe and even Southwest Asia) engage in minimal violence. Unless the state itself unleashes violence through highly repressive and misguided actions, such as in the Philippines since 2016 and previously in Thailand,¹¹ East Asian drug markets overall tend to be peaceful, with homicide rates in the low single digits per 100,000 in most East Asian countries.¹²

The current violence in Mexico also stands in dramatic contrast to crime patterns in the country before the 1990s. The hollowing out of Mexico’s law enforcement apparatus

by corruption and cartel infiltration during the 1980s, the arrival of cocaine in Mexico during that decade, and the inability of the Mexican government subsequently to conduct meaningful police reform laid the ground for the violence.

The fragmentation of cartels and the emergence of the *Cártel de Jalisco Nueva Generación*

Two factors precipitated the dramatic escalation of violence after 2006. In response to the brazenness and political ambitions of the cult-like criminal group La Familia Michoacana, President Calderón declared a war on the cartels and centered it on breaking up drug trafficking groups (DTOs) into smaller groups. Modeled on Colombia's experience in the early 1990s, the strategy's premise was that if the criminal groups were fragmented, they would lose power, and security would improve. The effect of Colombia's anti-crime policies in the early 1990s was indeed the emergence of many small groups after the downfall of the Medellín and Cali cartels that until then had dominated Colombia's and the Western Hemisphere's drug trafficking. None of the smaller groups has managed to accumulate the same level of coercive power and corruption capacity that the Medellín and Cali cartels had, but Colombia's context was different from Mexico's, and the break-them-up policy produced highly negative side effects in both cases.

When the Colombian government finally decided to go after Pablo Escobar's Medellín cartel in the early 1990s, the Colombian drug market featured an essentially bipolar structure, dominated by the Medellín and Cali cartels under whose umbrella smaller DTOs functioned. Critical to the success against the Medellín cartel was cooperation from the Cali cartel, which provided intelligence and eliminated many of Escobar's people under the expectation that it would inherit the entire drug market after getting rid of its rival organization. Although it was subsequently compelled to also take on the Cali cartel, the Colombian state proved unable and often uninterested in providing security and other public goods to the areas used for drug production and smuggling. The lack of a multifaceted state presence in large parts of country and the power vacuum in the criminal market were filled by other violent nonstate actors—the paramilitaries who later in the 1990s created an umbrella political organization, Autodefensas Unidas de Colombia (AUC), and the leftist guerrillas Fuerzas Armadas Revolucionarias de Colombia (FARC). The two groups were able to take over Colombia's cocaine market, with many independent drug traffickers buying positions of power and military commander titles in the AUC. Both of them also escalated Colombia's civil war to one of its bloodiest phases during the latter half of 1990s and early 2000s.¹³

When President Calderón decided to take on the DTOs, the Mexican drug market did not have such a neat, bipolar structure of being divided into two predominant groups. Instead, the criminal market was multipolar, with at least six large criminal groups.¹⁴ Thus, Mexican law enforcement moves against the groups weakened them, but did not clearly transfer power to either the state or one particular criminal group. Instead, the state's actions disturbed the balance of power among the criminal groups and their ability to control territory and smuggling routes and to project power to deter challengers. This lack of clarity about the balance of power in the criminal market tempted the DTOs to try to take over one another's territory and engage in internecine warfare. The leader of the Sinaloa Cartel, Joaquín "El Chapo" Guzmán, unleashed such a series of aggressive wars against rival DTOs, allowing Sinaloa to take over lucrative drug smuggling hubs, such as Ciudad Juárez and Tijuana.¹⁵ Other groups, such as Los Zetas started wars against their formal masters, the Gulf Cartel, in Tamaulipas and elsewhere, including Monterrey.¹⁶

The lesson that Mexico should have drawn from the Colombian experience is that merely breaking up the cartels is insufficient; the state needs to increase its presence in a multifaceted fashion and strengthen its authority as well its legitimacy with local populations.

Yet just like in the Colombian case in the 1990s, the Mexican state failed to effectively fill in the vacuum in the criminal market because the military forces Calderón deployed to combat the cartels lacked adequate skills and strategy, and because police reform proved exceedingly difficult and slow-going. Today, 12 years later, the unfinished police reform remains a major hole in Mexican anti-crime efforts. In particular, the urgently and badly needed systematic reform of local police forces has not even begun, and local municipal police forces remain weak and often dominated by criminal groups.

The rise of the CJNG and its increasing expansion and aggression throughout Mexico do not negate the overall trend toward fragmentation. The criminal group itself emerged in the wake of the 2010 splintering of the Milenio Cartel operating in Jalisco, Michoacán, and Guerrero as a result of the Mexican government's targeting of criminal group leaders.¹⁷ The CJNG has sought to absorb smaller splinter groups elsewhere, intimidate rivals into paying tribute, and create alliances with smaller groups and younger traffickers. At first, it cooperated with the Sinaloa Cartel in targeting Los Zetas, such as in Veracruz, but as the Zetas themselves became weakened and fragmented and the ambition and aggression of CJNG grew, the group eventually turned against its erstwhile partner, the Sinaloa Cartel. Particularly after the third arrest of El Chapo in Mexico in 2016 and his extradition to the United States in 2017, the Mexican criminal market has become inflamed with a war between the CJNG and the Sinaloa Cartel, with the CJNG seeking to wrestle away territories, businesses, and allies from its Sinaloa rivals throughout Mexico. Violence has thus spread to parts of the country that have previously been less violent, including Mexico's south.

The war between the two groups even appears to have spread to Colombia, where since 2017 their rivalry has allegedly contributed significantly to infighting among local criminal actors over allegiance to and partnership and business deals with the two Mexican partners.¹⁸ Mexican criminal groups, particularly the Sinaloa Cartel, have operated in Colombia at least since 2008 when Diego Murillo Bejarano (known as Don Berna), the leader of the Medellín umbrella crime group, the Oficina de Envigado, was extradited to the United States. Their presence increased in 2012 after significant, if temporary, reductions in cocaine production in Colombia. In response, the Sinaloa Cartel intensified its cooperation with Oficina de Envigado and diversified its networks to also include the Gulf Cartel, also known as the Urabeños, even as the Zetas were trying to move in on some of the supply chains and partnerships in Colombia.¹⁹ By then, the Sinaloa Cartel had also developed smooth and extensive cooperation with the FARC. Since 2016, however, the CJNG has tried to challenge some of Sinaloa's existing partnerships in Colombia, taking advantage of multiple shocks and disruptions of the Colombian drug market. These have included the FARC demobilization and withdrawal of most of its elements from drug production and trafficking; the instability and splintering within the Oficina de Envigado following a series of arrests;²⁰ and the Colombian government's arrests of the Urabeños' leaders, the government seizures of large portions of the cartel's cocaine, and the efforts of its top leader Dairo Antonio Úsuga (known as Otoniel) to negotiate a leniency deal with the Colombian government.²¹ Both the Sinaloa Cartel and CJNG have been seeking to cultivate a new and diversified set of partners, such as Urabeños factions no longer bound by loyalty to Otoniel and similar factions within the Oficina.

To avoid cocaine supply disruptions, both have also sought to cultivate numerous local criminal actors, such as FARC dissident factions that have returned to drug trafficking and those that never demobilized, local *bandas criminales* (criminal bands), and other resident insurgent groups, such as The National Liberation Army (Ejército de Liberación Nacional, or ELN). In some areas, their presence has moved closer to Colombia's coca cultivation: In Nariño, the Sinaloa Cartel appears to seek to cut out local intermediaries and work directly with criminal groups formed out of FARC dissidents and units that did not demobilize.²² Elsewhere, the criminal group has apparently supplied agronomists to improve cocaine yields or supplied cash to local operatives of weakened national groups, such as the Urabeños.²³ Although the rise of violence in Colombia's criminal market following the FARC demobilization and the recent hits against the Urabeños and the Oficina de Envigado would have taken place even in the absence of the Mexican groups, the war between the Mexican cartels further augmented it.

However, the overarching bipolar fight between CJNG and the Sinaloa Cartel should not be interpreted as a consolidation of the criminal market in Mexico, reversing the fragmentation trend. More often than not, such as in Tijuana,²⁴ Baja California and Baja California Sur more broadly, or Ciudad Juárez, CJNG simply seeks to wrest away the allegiance or tribute of local criminal groups from the Sinaloa Cartel. But this switch of allegiance does not in fact mean that CJNG has a firm grip on the local actors or that it can control their loyalty better than Sinaloa. Moreover, the war between the two large group also provides much space for maneuver for local criminal upstarts and also sets off new splintering within the two large cartels and among their local proxies.

High-value targeting and the accompanying rise in violence

Like in the case of the Milenio Cartel's splintering that gave birth to CJNG, the fragmentation of Mexican criminal groups has also been driven by the emphasis on high-value targeting (HVT)—the effort to arrest or kill top traffickers—in Mexican law enforcement strategies. Practiced in counterterrorism and counterinsurgency operations in Iraq and elsewhere, HVT is based on the assumption that the destruction of a group's leadership will cripple its operational capacity. Yet the adoption of the strategy in Mexico had a built-in flaw that was ignored: The ability of criminal groups to replace fallen leaders is far greater than the ability of insurgent and terrorist groups to do so. In part, that is because the leadership requirements of a drug trafficking or criminal groups, including in terms of charisma and the capacity to entrench and sustain the group, tend to be far lower than for a terrorist or insurgency leader.²⁵ The capacity of a DTO or a criminal group to regenerate leadership is great.

Targeting the middle operational layer of a criminal group is a far more effective way to disable it, particularly if the vast majority of it can be arrested at once. In fact, the Medellín cartel was destroyed well before Escobar was shot on the rooftops of Medellín by Colombian forces. The Colombian security forces, the Calí cartel, and Los Pepes (an anti-Escobar militia and a core of the future paramilitaries) had arrested and killed hundreds of Escobar's lieutenants well before he was shot, essentially eliminating the middle level beforehand.

Focus on the middle layer is highly prominent in U.S. and British anti-organized crime operations—precisely to prevent an easy and violent regeneration of the leadership of

the targeted criminal group. Thus, U.S. interdiction operations often run for months or years and the goal is to arrest as much of the middle layer at once as possible. Often hundreds of people are arrested in one sweep, such as in U.S. actions against Los Aztecas and La Línea, two prominent Ciudad Juárez gangs, in response to attacks against the U.S. Consulate and its personnel there.

But the Mexican government remains deeply challenged in middle-layer targeting for several reasons: It continues to lack both tactical and particularly strategic intelligence on Mexico's criminal groups. The Mexican law enforcement apparatus also remains corrupt, making it risky to sit on any intelligence or asset for a long enough time to build up a picture of the middle layer of a criminal group, for fear of leaks. Finally, as the intelligence phase of middle-layer targeting takes such a long time, there can be extended periods when political leaders have no visible action to show to the public. In contrast, high-value targeting, though of limited effectiveness and potentially counterproductive in re-activating violence, delivers bodies that can be shown to Mexican cameras and U.S. law enforcement counterparts as demonstrations of resolve and success. Hence, the Peña Nieto administration was not able to break away from HVT.²⁶

Pursuing high-level targets has exacerbated violence in Mexico also by disrupting succession mechanisms, giving rise to violence within criminal groups over leadership. Younger and younger bosses often have to prove their claim to power and leadership through violence, particularly in the absence or weakening of familial ties as the basis of leadership legitimacy. And they face violent challenges, often from lieutenants in charge of enforcement and aggression: The refusal of Dámaso López Núñez (known as "El Licenciado"), the Sinaloa Cartel's third-ranking leader, to accept the transfer of Sinaloa leadership to El Chapo's sons after his extradition to the United States is a pertinent example.²⁷ Moreover, the young narcos may also lack skills in negotiating power-sharing deals, with much of their formative experience over the past decade having been in constant fighting. The infighting over succession further complicates calculations of balances of power and turf divisions among the criminal groups.

In short, fragmentation of the cartels, a purposeful result of state actions and an inadvertent side-effect of HVT, produced a highly complex multipolar criminal market that makes clear calculations of balances of power, and hence the establishment of deterrence, difficult. HVT also disrupted the capacity of criminal groups to peacefully transition leadership, resulting in the splintering of criminal groups and their inability negotiate stable market-sharing deals among themselves. The outcome has been that the groups may be smaller, but the criminal market is far more violent.

The continual corruption, weakness, and lack of competence in Mexican law enforcement, particularly of local and state police forces, but also of the Federal Police, have created a bedrock climate of impunity and critically exacerbated the criminal violence.

The instability of narcopeace and failure to weed out the most violent criminal groups

To the extent that violence subsided in particular areas, such as Ciudad Juárez, Tijuana, and Tamaulipas between 2013 and 2016, it has been principally because a particular criminal group established sufficient control over that criminal market. Local law enforcement and anti-crime socio-economic policies helped in various degrees. These included, for example, the improvements in cooperation between federal and

local police forces; increased and improved activities of local police forces, such as in Tijuana and Ciudad Juárez; the creation of new police forces, such as La Fuerza Civil in Monterrey; the large-scale socio-economic program Todos Somos Juárez, which sought to create legal economic opportunities and expand social services in Ciudad Juárez, and the mobilization of local civil society and business community in Monterrey and Ciudad Juárez. However, at the core of violence reduction in each location has been a narcopeace—i.e., the reduction of violence due to the victory and the establishment of dominance by a particular criminal group: in Ciudad Juárez and Tijuana, the Sinaloa Cartel; in Monterrey, the Gulf Cartel. All of the various interventions proved either secondary in their importance to the presence of criminal balances of power in the particular area, or ephemeral in the intensity of their impact—that is the case also with Monterrey's La Fuerza Civil.²⁸ And all of them have proven themselves to be vulnerable to the disruption of the narcopeace and to the disintegration of balances of power among criminal groups operating in the area.

Where power contestation has failed to produce a dominant victor in the criminal market, such as Michoacán and Guerrero, violence has persisted.²⁹ Of course, in places such as Guerrero, there has not been a thorough law enforcement or civil society effort since 2006. And in Michoacán, successive deployments of the military forces and Federal Police failed to effectively pacify and deter criminal groups, and efforts to disband anti-crime and criminally co-opted militias atrophied without lasting effects. This policy neglect and weakness only exacerbated the dependence on the balances of power among criminal groups. The weakness of law enforcement and governance also left the field open for the expansion of CJNG into those areas, accompanying violent contestation over local allies, social alienation, and governance by criminal actors.

The establishment of narcopeace brought welcome relief from the debilitating violence. But its unfortunate consequence was that local and national authorities often subsequently dropped the ball on strengthening law enforcement capacities and anti-crime economic programs in the areas that were temporarily pacified, such as Tijuana and Monterrey. The decrease in violence should have been an opportunity to break from merely tactically responding to violence. It should have enabled the development and implementation of long-term policies to strengthen the multifaceted dimensions of power of local and national authorities over criminal groups. Instead, it mostly produced a loss of local and national interest in improving law enforcement and anti-crime socio-economic efforts to sustain public safety. Even civil society mobilization fizzled out, including in Ciudad Juárez, where it had been celebrated as a game-changer.³⁰

Yet a key problem of narcopeace is that it exists through the might, and at the discretion, of criminal groups, not as a result of the deterrence capacity of the state. If the strength of the dominant criminal group weakens vis-à-vis rivals or if another criminal group redevelops the taste for aggression, the fighting can break out once more and the state may lack the capacity to deter the resumption of violence.

The rise of violence in Ciudad Juárez since 2016 provides a pertinent illustration. The infighting between El Licenciado and El Chapo's sons following El Chapo's 2016 arrest and subsequent extradition to the United States weakened the Sinaloa Cartel throughout Mexico. The aging and illness of Sinaloa's second in command, Ismael Zambada García, only exacerbated the situation as Zambada has been one of the most effective negotiators among Mexico's drug capos. The onslaught of the CJNG on Sinaloa's empire throughout Mexico, including in Tijuana, further diminished Sinaloa's

reputation of dominance and power, which in turn stimulated challenges to its turf. Thus, since 2016, the Juárez Cartel has attempted to retake most of its former territory from the Sinaloa Cartel in and around the city. Moreover, Sinaloa's perceived weakness motivated the Mexicles and the Artistas Asesinos gangs to defect from Sinaloa and strike up an alliance with the Juárez Cartel. At the same time, the switch of allegiance has not prevented infighting between these two gangs and La Línea, their rival when they sided with Sinaloa. The result has been an escalation of violence in Ciudad Juárez, with 672 murders in 2016 and 460 between January and September 2017.³¹ The arrival and commercialization of cheap methamphetamine for local consumption in the city, not merely as export to the United States, also augmented a sense in the criminal groups that control of these markets was a worth fighting over. The estimates of drug users in Ciudad Juárez have ranged from 50,000 to 200,000, with no systematic surveys regularly undertaken.³²

The series of policies that the federal government and local authorities experimented with and put in place in Ciudad Juárez—from deployments of the military and Federal Police, to local police reforms associated with prominent supercop personalities such as Julián Leyzaola, to civil society mobilization, to Todos Somos Juárez socio-economic programs—were not able to prevent and deter violence escalation, even if they perhaps reduced its intensity.

The Mexican crime market's proclivity toward violence is exacerbated by the government's inability to weed out the most violent criminal groups and send a strong message that they will be prioritized in targeting, as advocated by criminologists.³³ Although the Mexican government has sought to target some of the most violent criminal groups, such as La Familia Michoacana, Los Caballeros Templarios, and Los Zetas, it cannot be credited with having deterred extensive violence and turf aggression: Violence subsided primarily as a result of a local narcopeace, and actions of rival groups were critical for the defeat of the violent aggressor.³⁴ The message has not yet sunk in that violence and aggressiveness do not pay. Thus, the breaking up of the La Familia Michoacana only gave rise to Los Caballeros Templarios. The destruction of the Zetas has been followed by the empowerment of the equally aggressive CJNG. Like the Zetas, the Jalisco group centers its rule on brutality, brazenness, and aggressiveness.³⁵ Like the Zetas and unlike the Sinaloa Cartel, the CJNG does not invest in and provide socio-economic goods and governance in order to build up political capital.³⁶ Its rule is through force alone.

The diversification of the violence and the political capital of criminal groups

One consequence of the fragmentation of criminal groups is that many of them are compelled to branch out into a variety of criminal enterprises such as extortion, drug production, trafficking, and distribution. Small splinter groups struggle to robustly penetrate and control smuggling across territories large enough for them to generate sufficient profit, so they engage in extortion. For larger groups, generalizing extortion to target local businesses and society, a form of taxation by a non-state actor, is not merely a source of money, but also a source of authority. Indeed, extortion in Mexico has become both generalized and widespread, affecting anyone with a profitable business—from Pemex, to logging and mining, to port companies in Michoacán, to restaurant operators in Tijuana.³⁷ Criminal groups have also become directly involved in fuel theft and its illegal distribution, kidnapping, and many other prohibited activities, such as illegal logging.

In contrast to the criminal groups choosing to rule through sheer might alone, others, such as La Familia Michoacana, Los Templarios, and the Sinaloa Cartel, have been providing a variety of governance functions beyond the distribution of handouts, such as the adjudication of disputes and enforcing judgments, thereby acquiring authority and political capital.³⁸ This is especially true, when they also seek to dominate and intimidate local politicians and usurp and control local administration budgets, such as in large parts of the so-called Tierra Caliente in Michoacán and Guerrero.

At the same time, the government's efforts to suppress crime through socio-economic programs lost momentum and funding. For example, Plan Michoacán, announced by President Peña Nieto in 2014 in response to the pervasive formation of militias in that state, failed to achieve robust and systemic effects. At first, it seemed to be delivering some immediate high visibility projects, such as the expansion of the Morelia airport (for which it was relabeling already appropriated funds). But most promised projects were simply not delivered at all. In Ciudad Juárez, the post-Calderón reduction of funds for Todos Somos Juárez equally hollowed out the projects: Many previously delivered programs for vocational training and public spaces in violence-troubled neighborhoods simply shut down. Under political pressure (typical of democracies) to give resources to each municipality struggling with crime and poor socio-economic conditions, underdevelopment, and the lack of public services, the Peña Nieto administration decided to spread its anti-crime socio-economic package across Mexico, and not concentrate it in Ciudad Juárez like the Calderón administration had done. This tendency to spread help widely (but thinly) significantly limited the effectiveness of any single intervention and failed to achieve transformative effects in most places. Moreover, the entire anti-crime socio-economic program, the National Program for Social Prevention of Violence and Delinquency (Programa Nacional para la Prevención Social de la Violencia y el Delito), informally referred to as the *polígonos* (polygon) program, ran out of money by 2016.

Popularization of violence

Participation in crime and violence in Mexico has expanded significantly in two ways. When crime is prevalent, criminal activity and groups are visible, and effective prosecution rates are woefully low (in Mexico mostly around 2 percent), criminals can easily get away with their illegal activities. For example, extortion becomes generalized because even smaller criminal groups and individuals can hide behind the cloak of a large criminal group and appear credible in their threats. Thus, many individuals who would normally be deterred from criminal activity may be tempted to participate in it because of the perceived ease of making crime pay and getting away with it. In Mexico, this general collapse of anti-crime deterrence has led, for example, to the emergence of extortion on university campuses by fellow students pretending to be working for criminal groups.³⁹

Second, violence has become generalized in Mexico through the emergence of anti-crime militias. Arising in response to the state failure to protect residents from extortion and criminal violence, and symbolizing the weakness of the central state in providing public safety, the militias have been most prominent in Michoacán and Guerrero.⁴⁰ They have taken on the functions of arresting people whom they accuse of working for criminal groups, and holding their own court trials and meting out sentences. In some towns, they have expelled local police forces, dismissed local government officials, taken over police stations and mayors' offices, and prevented the access of federal authorities. At

the same time, militia members themselves began engaging in their own predation on local communities,⁴¹ while criminal gangs also revamped themselves under the cloak of militias. The Peña Nieto government response—enrolling some of the vetted militias into the Rural Defense Corps—was perhaps the least bad option at the time because the state feared bloodshed by confronting the militias forcefully. However, it also proved woefully inadequate as many persisted outside of the law and continued to engage in criminal activity, and the vetting and accountability mechanisms were insufficient.⁴² Subsequently, the Mexican government exhibited a temporary willingness to act against the militias, including arresting and prosecuting some of their members,⁴³ but that too did not lead to their systematic dismantling or to deterrence to their formation. Many militia units refused to join and continued challenging the state, existing outside the grip of state authority, engaging in criminal behavior and human rights abuses against local residents.⁴⁴

Not surprisingly, in Guerrero, the state government could not even manage to sign deals with any of the militia groups, let alone enforce them. Various militias—whether genuinely indigenous police forces or fronts for local criminal gangs—continued to arrest and detain soldiers and government officials, and homicide and extortion rates remained high.⁴⁵ The election campaign in 2015 took place amidst bitter memories of the Iguala massacres and widely assumed state complicity, and featured widespread intimidation by rival militias and organized crime groups, disappearances, and assassinations of local government officials and political candidates.

One of the most dramatic incidents involving Guerrero's self-defense forces took place in early May 2015 in the town of Chilapa. Although small in size, Chilapa is strategically located in the foothills of a major poppy growing area and is a major logistical hub for the drug trade since it has the only gas station within miles. Following the assassination of a local political candidate in April 2015, 300 civilians armed with rifles, machetes, and sticks, followed by pickup trucks with men sporting high-caliber weapons, seized the town. Although the Mexican military and federal and municipal police were present, they failed to act against the self-proclaimed self-defense group. Whether out of intimidation, indifference, complicity, or on orders from higher up, the military and police stood by for several days as the militias took control of the town, set up checkpoints, and detained people. At least 11 of those detained (and perhaps as many as 30) have not been seen since. Townspeople believed that the self-defense force, which after several days left on its own accord, was actually the criminal gang Los Ardillos, fighting over the important heroin turf with another gang, Los Rojos, one of the splinter groups left in the wake of Beltrán Leyva Organization.⁴⁶ Both criminal gangs have extensive linkages to local Guerrero politicians. Three years later, insecurity in Chilapa, and Guerrero more broadly, prevails. In 2017, the Chilapa municipality had a homicide rate of 135 per 100,000 according to Guerrero's state attorney general, and even higher according to independent estimates.⁴⁷ Guerrero and the neighboring Michoacán also remain areas of high outmigration from Mexico to the United States, even as elsewhere in Mexico such outmigration has been significantly down over the past several years.⁴⁸

The poppy policy distraction

The strength of militia groups in Guerrero is not surprising, given the state's history of limited government presence, underdevelopment, militarization, and power abuse.⁴⁹ The situation there has come to be deeply intertwined with the U.S. opioid epidemic

that has stimulated the expansion of poppy cultivation in Mexico. The current U.S. opioid epidemic has produced a death toll of about tens of thousands annually over the past several years, with overdoses reaching 70,000 in 2017.⁵⁰ It originated with U.S. pharmaceutical companies pushing the increased use of legal opioids for the treatment of short-term pain, rather than for terminally-ill patients, and not disclosing the addictive qualities of the prescription drugs.⁵¹ When doctors were subsequently urged to cut back on prescribing opioids, the legal supply shrank amidst already massive addiction rates, and patients and recreational users who had become dependent turned to illegal opioids such as heroin.

Predictably, poppy cultivation shot up in Mexico and also emerged in Guatemala. Poppy cultivation in Mexico is nothing new, dating back to before WWII, as well as supplying legal medical opioids for the United States during the war. After U.S. demand for medical opioids declined subsequently, poppy production turned to supply the illegal drug market in the United States, flourishing particularly in the 1970s before declining due to U.S.-Mexican poppy eradication drives in Mexico and, importantly, a widespread takeoff of cocaine consumption in the United States. Thus, in 2000, Mexico's poppy cultivation only covered 1,900 hectares,⁵² compared to perhaps 30,000-40,000 hectares of marijuana cultivated yearly during the same period.⁵³ But by 2009, poppy cultivation shot up to 19,500 hectares.⁵⁴ This substantial level of poppy cultivation was on par with Burma in the 2000s and higher than Thailand at its peak in the 1960s.⁵⁵

At the same time, about 15,000-20,000 hectares of opium poppy were eradicated in Mexico during 2000s, as were between 20,000 and 30,000 hectares of marijuana.⁵⁶ The Mexican military has historically carried out the eradication of illicit crops in Mexico, often as a result of U.S. pressure, and in the 1960s and 1970s the effort was intertwined with complex counterinsurgency efforts in Guerrero.⁵⁷ By 2016 and 2017, poppy cultivation in Mexico increased to 30,600 hectares.⁵⁸ (Those numbers may not be precise, since the government of Mexico long sought to prevent U.S. and U.N. measurements of the level of poppy and marijuana cultivation on its territory.) At the same time, the government of Mexico claimed to have eradicated 29,692 hectares of poppy in 2017, implying—unrealistically—that it wiped out virtually all of Mexico's poppy cultivation. Alternatively, eradication simply results in immediate replanting without supply being significantly affected, which is likely because poppy farmers cultivate more than one poppy crop yearly.

When the Trump administration came to power, demands for intensified eradication moved to the forefront of its anti-crime agenda with Mexico, along with stopping migration from and through Mexico to the United States. The Trump administration's counternarcotics policies emphasized aggressive supply-side suppression policies abroad. Thus, it has promoted eradication in Mexico, as much as it has pushed for the resurrection of intensive eradication, including aerial spraying, in Colombia.⁵⁹

But the prime areas for poppy cultivation, such as in Guerrero and Michoacán, are hotly contested among Mexican drug trafficking groups, including the remnants of La Familia Michoacana, Los Zetas, the Sinaloa Cartel, the Acapulco Cartel, the CJNG, and a myriad of splinter groups, such as Los Rojos and the Guerreros Unidos.⁶⁰ Their fighting has intensely exacerbated the insecurity of local populations, even as they depend on illicit poppy cultivation for basic economic survival.

The cultivation of illicit crops employs thousands, perhaps tens of thousands, though precise data are lacking. In fact, poppy cultivation is among the most labor-intensive illicit economies, enabling those who sponsor it—whether insurgent groups or organized crime groups—to obtain extensive political capital.⁶¹ That is very much the case in Mexico where, like in other parts of the world, the poppy farmers are some of the poorest and most marginalized citizens and often also members of indigenous groups. And in some areas, such as in the state of Michoacán and Guerrero, the drug economy—both cultivation and trafficking—represents a substantial portion of the local economy.

Yet Mexico has historically shown little interest in developing alternative livelihoods strategies in response to illicit crop cultivation, even rejecting U.S. assistance for such programs.⁶² At other times, the alternative livelihoods and broader rural development efforts ended up highly ineffective—sometimes poorly designed and underresourced, often undermined by extensive corruption by local administrators and political bosses known as *caciques*.

Serious alternative livelihoods efforts require extending state presence, engaging in broader and more equitable development, and sustaining the resources and political wherewithal to tackle the highly skewed political and economic power distribution in Mexico and the extreme social marginalization of many of its communities. Neglecting those areas—despite an umpteenth *Plan Guerrero* (a government package of socio-economic interventions mostly amounting to discreet handouts)—is cheaper and easier. But it comes at substantial and complex costs to the local residents and ultimately to the rule of law in Mexico. Tragically, it is much easier to occasionally eradicate the crops and the farmers' livelihoods.

But an eradication campaign in the poppy cultivating areas severely complicates efforts of the Mexican military and law enforcement forces to pacify the festering states of Michoacán and Guerrero, rid them of the rule of violent organized crime, and perhaps (hopefully) for the first time bond its residents with the Mexican state. Eradication is a relatively easy policy to undertake and can be shown as a deliverable to the United States, even if access to poppy fields is difficult.⁶³

But poppy and its eradication are a distraction from Mexico's fundamental problem of weak state deterrence capacity against criminal groups. In fact, eradication merely thrusts poppy farmers deeper into the hands of criminal groups that sponsor and protect the cultivation, and potentially increases violence in the poppy cultivating areas. It does not shrink the supply of illegal opioids destined for the U.S. market, since farmers replant poppies after eradication and can always shift areas of production and cultivation to Guatemala and other areas.

Worse yet, should eradication of poppy in Latin America miraculously become successful, the U.S. drug market may even more resolutely switch to fentanyl, the last drug that the United States wants to see spreading.

That change is happening in the United States anyway, even without eradication in Mexico having become more effective. The rise of deadly fentanyl abuse in the United States has already contributed to the suppression of opium prices in Mexico, as both DTOs and dealers prefer to traffic and sell fentanyl. Opium prices in places such as Guerrero have collapsed by at least two-thirds (to between \$200 and \$300 per kilogram of opium) from their peak value between 2014 and 2017 when it reached between \$900-\$1000 per kilogram.⁶⁴ At this meager price, opium farmers are struggling to make ends meet.

The dark horse of fentanyl

Fentanyl is already the deadliest killer among U.S. drugs, responsible for at least 28,466 fatal overdoses in the United States in 2017, out of more than 70,000 drug overdose deaths.⁶⁵ The production of fentanyl and its analogues does not involve the cultivation of plants; it is a synthetic drug manufactured in laboratories. Highly potent and addictive, fentanyl is a lethal drug because even very small amounts can cause fatal overdose. Moreover, fentanyl is increasingly laced into heroin and even cocaine,⁶⁶ a key factor in the deadliness of the U.S. drug epidemic. Fentanyl has many advantages for smugglers: small amounts supply the market for a long time at very high profits. Eluding law enforcement is thus much easier than selling other drugs, particularly bulky, smelly, and easily detectable marijuana, but also heroin or cocaine. And its production is not labor intensive and can be easily hidden. Fentanyl penetrated the U.S. criminal market starting in 2014, with Chinese factories and chemists *selling* the legal drug illegally. Much of the supply from China gets to the United States through regular mail, legal ports of entry, and internet orders.⁶⁷

The Obama administration's engagement with China laid the groundwork for Beijing's decision to ban the production of four variants of fentanyl in March 2017 and another 25 analogues in the fall of 2018. Despite the Trump's administration's tense relations with China, one area of continued cooperation between the two countries is counternarcotics. Chinese government officials have stated that China prides itself on its global leadership in combatting illegal drugs and would not link its counternarcotics cooperation with the United States to the Trump administration's trade war with Beijing or the geostrategic tensions between the two countries.⁶⁸ And in early December 2018, the United States announced that China agreed to start controlling the entire class of drugs containing fentanyl, not just specific analogues.⁶⁹ But that has allowed Chinese pharmaceutical companies and illegal producers to elude regulation by slightly altering the chemical formula of the substance. These still uncontrolled deadly substances could then be shipped directly to the United States via the post office. Moreover, China did not specify how quickly it would implement the new policy, indicating instead that its implementation would take time as it would require amending China's laws. Nor did Beijing indicate how it planned to monitor China's immense and powerful pharmaceutical and chemical industry of over 160,000 companies, many with multiple production facilities and some manufacturing tons of chemicals weekly and over one million pills daily,⁷⁰ to ensure that the legal production of fentanyl for surgeries and terminal-care cancer patients is not diverted for recreational use.⁷¹

Drug control discussions with India—an equally large producer of precursors for illegal drugs and increasingly also synthetic drugs—are far less advanced because India mostly remains in profound denial about its role. Although in September 2018 India shut down one illegal fentanyl factory,⁷² its pharmaceutical industry is as powerful as China's, but the Indian government's regulatory and enforcement capacities are far weaker. In any case, fentanyl and other synthetic drug technology and infrastructure will proliferate rather quickly, with Nigeria and South Africa, both intensely involved in the smuggling and production of illegal synthetic drugs, well positioned to become future sources or key transshipment areas.

Instead of focusing on the root causes of the U.S. opioid epidemic and more robustly regulating the U.S. pharmaceutical industry, the Trump administration has prioritized suppressing drug crops abroad, such as via the eradication program in Mexico. But

the fact that fentanyl is also smuggled into the United States via Mexico has become a major talking point for the Trump administration's justifications for building a wall along the border with Mexico.⁷³

The CJNG in particular became a pioneer in developing extensive control over fentanyl smuggling into the United States. Perhaps it hoped to use its smuggling to displace the Sinaloa Cartel from dominating wholesale drug distribution in the United States, by providing local dealers with a more potent drug. Given how violent the CJNG is in Mexico, such market takeover efforts could have brought the violence to the United States. Although weakened in Mexico, the Sinaloa Cartel would not take any effort to dislodge its primacy in wholesale distribution in the United States lying down. Thus, the United States could have experienced a rise in violence in its presently peaceful drug distribution markets, feeding the currently misguided and false rhetoric of the Trump administration over the criminal carnage in U.S. cities and its linkages to Mexico and Central American gangs.⁷⁴

So far, however, the Sinaloa Cartel has not responded violently in developing its own fentanyl supply chain. Although the drug is deadly, the Sinaloa Cartel's means of distribution remain non-violent in the United States. To avoid both detection and violence, the Sinaloa Cartel has even preferred to hire middle-aged couples to bring fentanyl to local dealers in one-time operations, smuggling the drug on Amtrak from Florida to New York City.⁷⁵ And as with other drugs, the cartel has come to dominate the fentanyl trade in the East Coast of the United States.

In the long term, however, fentanyl can significantly upend global drug markets and the prioritization of drug control in U.S. agendas with other countries. Ironically, if many users switch from organic drugs to synthetics, the United States may lose interest in promoting eradication of drug crops, such as coca or poppy. Such a switch would also weaken the power of criminal and insurgent groups who engage in drug trafficking. Even if they switch to the production of synthetic drugs, they could sponsor the livelihoods of many fewer people and thus lose significant political capital with local populations. Disrupting their operations may thus become far less politically costly for both local governments and external sponsors, as long as the traffickers are illegal operators such as criminal groups.⁷⁶ But it can become very politically costly for governments if the violators are powerful job- and revenue-producing pharmaceutical companies and entire industries, as is currently the case in China and India.

CONCLUSIONS

Over the past two decades, including since 2006 when the Mexican government decided to resolutely confront organized crime in Mexico, crime trends in the country have been worrisome. By and large, criminal violence has intensified and become more widespread geographically and functionally, severely affecting Mexican society, weakening the authority of the Mexican state, and undermining rule of law. Criminal violence now permeates many types of illegal and legal economies in Mexico. The temporary emergence of narcopeace, situations where one criminal group sufficiently dominates a territory or criminal network to deter violence by challengers, has proven ephemeral, only temporarily suppressing violence. Reasons for these outcomes have included poor security strategies and the persistent lack of deterrence capacity of Mexican law enforcement. The criminal market has become fragmented, with the number of criminal groups greatly increased. This ever-more complex multipolarity of

the criminal market has further exacerbated and complicated the violence. Criminal groups have diversified their portfolios into many illegal ventures, and many more types of actors, including militias, participate in violence and criminality, thereby popularizing it. The production of illegal drugs in Mexico, particularly of heroin, has also increased, even as marijuana cultivation has become far less profitable due to the widening legalization of recreational cannabis use and production by U.S. states, and meanwhile the U.S. opioid epidemic has exploded.

Violence in Mexico can decline in two ways: One is through a criminal group temporarily winning enough turf and establishing deterrence capacity that enables a local narcopeace. That has been the story of the temporary declines in violence in Mexico over the past 12 years. Such instances of narcopeace, however, will be ephemeral and easily dislodged by changes in balances of power among the criminal groups, and by opportunistic state law enforcement actions lacking strategic forethought, which has been the prevailing situation thus far.

Alternatively, violence can decline when the state at last systematically builds up enough deterrence capacity against the criminals and realigns local populations with the state—from which they are now often alienated. Mexico must strive to achieve this objective.

A reduction in criminal violence is a key reason why many Mexican citizens casted their votes for the new administration of Andrés Manuel López Obrador, demanding a change in Mexico's anti-crime policies. Even those who did not vote for AMLO want to see violence and criminality finally suppressed and human rights and rule of law in Mexico strengthened.

But those who expect rapid breakthroughs from the AMLO administration in reducing violence are likely to be severely disappointed. Instead, at least initially, violence is likely to rise and the criminal market and criminal groups in Mexico are likely to become even more fragmented and pose greater challenges to local authority and public safety.

There is no silver bullet to reduce violence in Mexico quickly and in a lasting way. In order to achieve that, Mexico must move beyond narcopeace to a basic status quo where law enforcement, ideally police forces, have a deterrence capacity. Police forces and rule of law reforms need to be deepened and strengthened. AMLO's announced creation of a new National Guard in Mexico does not obviate these core policy requirements. The Mexican government must develop a comprehensive law enforcement strategy beyond high-value targeting, sharpen its anti-crime socio-economic policies, and better integrate them with policing. The United States should remain a committed partner in that effort.

How Mexico and the United States can do so and how such policies mesh with AMLO's announced security strategy is analyzed in the accompanying paper, "AMLO's security policy: Creative ideas, tough reality."

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