



MEXICO:

A RISK ASSESSMENT REPORT

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EXECUTIVE SUMMARY

So far from God, so close to the United States; Mexico can be described as a nation of paradox. Being a relatively new democracy, Mexican politics and social development have progressed rapidly over the past several decades. Yet stable development and macro policy has not halted the downward trends and elevated risk factors in other areas of analysis. The controversial election of President Calderon by less than 1% in 2006 was a test of the fragile democratic process that had been opened to opposition parties in 1989. With his narrowly successful win of the presidency, an aggressive war against the narcotics trade was launched, escalating violent conflict both between rival drug cartels and between the cartels and the government. External economic and environmental shocks have compounded instability and the effectiveness of the current War on Drugs is questioned as government control continues to weaken and cartel influence increases. These factors lead this analysis to conclude that an overall downward trend can be recognized in Mexico.



KEY INDICATORS	INFLUENCE
<p>History of Armed Conflict CIFP Score: Low - Moderate</p>	<p>Stabilizing:</p> <ul style="list-style-type: none"> • Since independence, Mexico has had no major armed conflict. <p>Destabilizing:</p> <ul style="list-style-type: none"> • Intermediate level armed conflict in 1970s known as the “Dirty War”; waged by governments in power against social dissidents.¹ • Lingering tensions in southern regions with rebel group (EZLN – Ejercito Zapatista de Liberacion Nacional), though no longer armed activity.² • Historical intra-cartel and inter-cartel conflict has escalated since 2006.³ • 50% increase in asylum applicants to industrialized countries since the first half of 2007 to the first half of 2009.⁴
<p>Governance and Political Instability CIFP Score: High</p>	<p>Stabilizing:</p> <ul style="list-style-type: none"> • Significant legislative reform in 2007 and 2008 regarding elections, the freedom of the press, and anti-corruption.⁵ <p>Destabilizing:</p> <ul style="list-style-type: none"> • Dramatic increase in drug-trafficking related violence, resulting in the deaths of over 14,000 people since 2006, including several top police officials.⁶ • A significant deterioration of political and civil liberties due to the Government’s inability to protect its citizens and institutions from the destructive effects of organized crime. Extortion complaints received by Federal authorities have grown from 1,000 in 2003 to 50,000 in both 2007 and 2008.⁷ • Decline in freedom of the press, journalists increasingly subjected to severe violence and intimidation, with impunity for assailants.⁸ • 2006 Federal election saw a margin of victory of less than 1%, with the President’s opponent claiming the vote was fraudulent and publically declaring himself the winner.⁹ • High levels of corruption remain a serious problem.¹⁰
<p>Militarization CIFP Score: High</p>	<p>Stabilizing:</p> <ul style="list-style-type: none"> • Recent significant investment in the military may strengthen state capacity to more effectively challenge highly armed drug cartels. <p>Destabilizing:</p> <ul style="list-style-type: none"> • Since 2006, 45,000 Mexican troops have been deployed within Mexico to fight the drug cartels.¹¹ • Over 30% increase in Mexican military expenditure from 2006 and 2007 (increased funding retained for 2008). • A 600% increase in reports of military abuse since 2006, military personnel are generally tried in military courts where impunity is the norm.¹² • An estimated 150,000 Mexican soldiers have deserted since 2000.¹³
<p>Population Heterogeneity CIFP Score:</p>	<p>Stabilizing:</p> <ul style="list-style-type: none"> • Religious diversity is fairly homogenous, as Mexico’s population is predominantly Roman Catholic (76.5%).¹⁴

<p>Moderate</p>	<ul style="list-style-type: none"> Violence between the government and ethnic minorities has quieted since the mid 2000s. <p>Destabilizing:</p> <ul style="list-style-type: none"> Ethnically heterogeneous: 60% mestizo, 30% Amerindian, 9% white, 1% other. Ethnic minorities were targeted in the late 1990s and 2000s and conflict was violent.¹⁵ Recent passage of controversial laws by the government contrary to religious values, such as legalizing abortion.¹⁶
<p>Demographic Stress CIFP Score: Low</p>	<p>Stabilizing:</p> <ul style="list-style-type: none"> Consistent annual population growth of 1% between 2006 and 2008.¹⁷ Consistent annual population between ages 0 –14 (29%) and 15 – 64 (65%).¹⁸ The number of refugees hosted in Mexico decreased by more than half since 2006 to 1,055.¹⁹ <p>Destabilizing:</p> <ul style="list-style-type: none"> Growing risk of youth bulge as youth unemployment (ages 15-24) increased 1% from 2006 to 2007 (no data available for 2008).²⁰ The number of refugees originating from Mexico nearly doubled since 2006 to 6,162.²¹ Concern over mixed migration flows where 56,000 undocumented migrants were detained in the first 9 months of 2009. 8% of these being children.²²
<p>Economic Performance CIFP Score: Moderate - High</p>	<p>Stabilizing:</p> <ul style="list-style-type: none"> A continued increase of trade openness (from 55.9% in 2005 to 58.7% of trade as a percentage of GDP in 2008²³) indicates a strengthening of trade policy. <p>Destabilizing:</p> <ul style="list-style-type: none"> The global economic recession has decreased GDP growth to -7.34% in 2009.²⁴ While the entire global system contracted in growth rates in 2009, Mexico suffered an atypical large drop in growth. This, combined with situational factors and external shocks relating to the H1N1 flu virus, could slow recovery, further reducing growth rates and employment. The decline of the real economy has been compounded by a jump in growth of the shadow economy via the drug trade. The shadow, or illegal, economy has been estimated at US \$ 40 billion a year, grossing more than Mexico's oil exports.²⁵ Foreign Direct Investment (FDI), a major contributor to growth in the economy was estimated to have decreased significantly in both 2008 and 2009. While the recession accounts for part of the decline, increased investor concerns regarding corruption and security have also contributed negatively.²⁶ Inflation continued to increase yearly, from 3.9% in 2007 to 5.4% in 2009.²⁷ This, combined with a weakened exchange rate, lowered the purchasing power of the population. Income inequality, represented through the GINI Index, continues to increase as indicated by a jump from 47.9 in 2007 to 48.1 in 2009.²⁸
<p>Human Development CIFP Score: Low</p>	<p>Stabilizing:</p> <ul style="list-style-type: none"> Overall success with development policy has stabilized the living conditions and quality of life for many Mexicans. Life expectancy is high, at 76 years.²⁹ Medium to Low infant mortality and maternal mortality indicates increased health awareness and access to healthcare for those giving birth.³⁰ Primary school enrolment is high, with 98% of children enrolled.³¹ Secondary school enrolment is also high, with 72% of children enrolled.³² The overall literacy rate for the country has remained steady at 92.8%,³³ indicating an educated population and workforce. HIV and AIDS rates have remained stable at 0.3% of the population.³⁴ <p>Destabilizing:</p> <ul style="list-style-type: none"> Increased rates of drug usage and dependency among the population. The decriminalization of several narcotics in small quantities, including cocaine and marijuana, by the Mexican government in 2009 can also be destabilizing as usage rates continue to increase.³⁵
<p>Environmental Stress CIFP Score: Moderate</p>	<p>Stabilizing:</p> <ul style="list-style-type: none"> The World Bank helped Mexico implement a low-carbon program to reduce carbon emissions through the special climate change program (PECC). The response so far has been positive and carbon emissions continue to increase, but marginally.³⁶ The Mexican government identified deforestation and limited freshwater access as national security issues to be addressed immediately.³⁷ <p>Destabilizing:</p> <ul style="list-style-type: none"> Droughts like the one in September 2007 are becoming more common, leading to frequent national water shortages.³⁸ Mexico faces difficulties providing sanitized water in certain areas of the country, most commonly in the north and in some southern provinces. This will continue to be a problem as demand for freshwater increases for agricultural and domestic uses.³⁹ The influx of Guatemalans and displacement of people in Chiapas in the south cause further deforestation as they clear rainforests for communities.⁴⁰
<p>International</p>	<p>Stabilizing:</p>

Linkages CIFP Score: Low - Moderate	<ul style="list-style-type: none"> • Significant membership among prominent international organizations including NAFTA, OAS, and Merida Initiative Destabilizing: <ul style="list-style-type: none"> • Substantial linkages with drug cartels and illegal arms trade through Latin America
KEY STAKEHOLDERS – Internal	
Government	<ul style="list-style-type: none"> • After his marginal win in 2006, President Calderon launched a war against the drug cartels, in part as a measure to shore up popular support. The reputation of Calderon and his party rests on progress being made in the ‘war on drugs’, both in the eyes of Mexican citizens, and of key international actors including the US government, and foreign investors. However, as the indicators suggest the current government is heavily dependent on the military to battle the cartels and continues to face increasing drug-related violence and institutional corruption.
Military	<ul style="list-style-type: none"> • The strength of current military operations suggests considerable impact on the drug war. Yet, with an incentive to retain the increased funding and position of power that has been provided to the military under Calderon’s administration, they will likely oppose any additional restraints or oversight applied by the government. Additionally, drug cartel forces are personally targeting soldiers who oppose them, and in some cases, soldier’s families. A significant number of soldiers have deserted, and for those motivated by profit they may increasingly decide to ‘moon-light’ as armed forces for hire.
Drug Cartels	<ul style="list-style-type: none"> • Mexican drug cartels are the largest producer and supplier to U.S. markets of heroin, methamphetamine, and marijuana. 90% of cocaine entering the US currently transits through Mexico due to closure of drug routes from Colombia; however, Mexican cartels are gaining dominance over the entire market. • Inter-cartel conflict is increasing with the reconfiguration of major drug cartels. • As the government campaigns against drug cartels, increased efforts (violence, targeting officials, direct battle) to subvert government is leading to high levels of corruption within public office in exchange for the ability to act with impunity.⁴¹
Indigenous Groups	<ul style="list-style-type: none"> • The marginalization of indigenous people, primarily in the southern parts of the country, has led to discontent among the poor and landless and remains unresolved. • The formation of groups such as EZLN (Ejercito Zapatista de Liberacion Nacional) and EPR (People’s Revolutionary Army) had initially resulted in armed conflict though currently organized around non-violent and defensive action. • The EZLN continues to campaign for international support of indigenous rights and control over local resources.
KEY STAKEHOLDERS - External	
United States	<ul style="list-style-type: none"> • As a member of the North American Free Trade Agreement (NAFTA), the US is Mexico’s largest trading partner accepting over 80% of Mexico’s exports, and an important ally on the President Calderon’s ‘War on Drugs’. The US has pledged, under the Merida Initiative, \$ 1.4 billion to Latin America to aid in security development and counternarcotics in the region; Mexico will be one of the main partners in this initiative.⁴² • The border between the two nations serves to facilitate both legitimate trade and narcotics movement. US security is threatened by the flow of narcotics from Mexico into the US, and is a growing concern for policy makers on both sides of the border. • Through the Merida Initiative, the US has focused on restricting the flow of illegal weapons into Mexico, and the flow of drugs into the US. By increased surveillance mechanisms and the provision of military equipment both states hope the joint efforts will limit the cartels capacity. • Mexico and the US are members of several environmental, social and economic coalitions directed towards North American growth. They have signed and established the North American Development Bank (NADBank), the Border Environment Cooperation Commission (BECC) among others, under NAFTA. High levels of cooperation takes place between the two nations on a wide range of issues.
OAS	<ul style="list-style-type: none"> • The OAS created a committee to protect public security in the Americas and acknowledged Mexico’s fight against crime, as well as the drug crime as important to the region. The committee calls for solidarity and cooperation in the collective fight against crime.⁴³
Diaspora	<ul style="list-style-type: none"> • There is an upward trend in diaspora numbers, with the highest increase moving to the United States. From the United States alone, the amount of remittances has grown more than the Mexican population of the US has, to an estimated 16.6 billion in 2004.⁴⁴

Best Case Scenario

Cartels: Pressure from Mexican and American authorities combine with increased drug production costs and a flooded narcotics market making the Mexican drug trade significantly less lucrative for the Cartels. With reduced funds they lose power and influence within Mexican society. The cartels maintain a stable balance between themselves with territorial boundaries clearly demarcated, reducing the amount of inter-cartel violence.

Economy: With indicators of improvement in Mexican security and levels of corruption as a result of a weakened drug trade, Foreign Direct Investment floods into Mexico seeking to take advantage of perceived growth opportunities. The global economy rapidly recovers from the 2009 recession, all of which leads to a rise in Mexican GDP. The creation of wealth and jobs leads to growth in the middle class and begins to rebalance the country's wealth distribution.

Mexican Government / Military: The government gradually scales back its use of the military in its domestic fight against the drug cartels, as they are weakened. Military actors view the central Government as capable, and with a high likelihood of success in reducing the capacity of the drug cartels, and as a result military corruption and defection decrease.

US: The US identifies the deteriorating situation in Mexico, and prioritizes it as an urgent issue for National Security. The US dedicates significant time, money and expertise to develop and rapidly implement effective policies to erode the cartel's power base, and reinforce the Mexican Government.

Most Likely Scenario

Cartels: The drug trade remains an extremely lucrative industry within Mexico, with drug cartels retaining significant resources to counter the anti-cartel campaign led by the government. Both inter and intra cartel disputes over power and territory are further exacerbated by increased turnover within the cartel network, a result of stepped up Government attacks. This cartel instability leads to unpredictable periods of intense drug-related violence. Bribery and violence remain extremely effective and widespread tools of the cartels.

Economy: Mexican trade levels slowly increase as a gradual global economic recovery lead the US and Canada to return to pre-recession levels of trade with Mexico. The drug-based Mexican shadow economy, however, continues to steadily expand – acting as a corrosive force against the legitimate economy.

Mexican Government / Military: The Mexican Government continues to rely heavily on the military as its main weapon in the fight against the drug cartels, while failing to achieve any significant long-term progress. Individuals and businesses increasingly resort to hiring private security to protect themselves, as drug-related violence increases.

US: The US identifies the deteriorating situation in Mexico, but a variety of obstacles continue to impede the design and implementation of effective policies to assist. The US remains distracted with a myriad of other security and military operations.

Worst Case Scenario

Cartels: The drug cartels further increase their significant power and presence. Overflowing coffers are used to bribe state officials, methodical and horrific violence used to intimidate and eliminate those who are defiant. Cartels exercise a de facto monopoly over the use of force in growing portions of the country. The fractioning of cartels and ongoing disputes for territory leads to increased inter-cartel violence.

Economy: Legitimate economic activity is dramatically reduced as foreign direct investment rapidly dries up as a result of the insecure environment and rampant corruption generated by the drug cartels. Declining GDP also reduces legitimate employment opportunities resulting in an increasing number of people turning towards illegal activity. The drug trade begins to account for nearly one third of the Mexican economy. Economic growth following the 2009 recession remains slow and unstable, which stunts the trade-reliant Mexican economy. Inequality continues to widen dramatically, as the Mexican middle-class is hollowed out.

Mexican Government / Military: Government overreliance on the military as its sole tool against drug cartels leads to weakened civilian control over the institution. Over-whelming financial incentives and pervasive corruption lead to a splintering off of some military forces into divisions acting as for-profit paramilitary forces, frequently on behalf of the drug cartels. Public confidence in the military plunges.

US: Despite rapidly deteriorating situation, US leaders fail to follow through with effective policies. With a dramatic increase in cross border gang-violence and drug-trade, powerful domestic pressure leads to a dramatic thickening of security at the border, strangling the remaining legitimate cross-border trade.

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