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*About the Book*
Controlling the armed forces is one of the major challenges for new and established democracies alike. Militaries’ resistance to control often takes the form of dissent over defense and security policy, as happened in the United Kingdom during the wars in Iraq and Afghanistan (de Waal 2013), or outright involvement of retired or active officers in policymaking, as under the Donald Trump administration in the United States (Coletta and Crosbie 2021). In drastic situations, the military also might resort to overt varieties of disobedience that may lead to the breakdown of governments (for example, the Argentinian military’s declining to crack down on mass protests in 2001), or even topple the democratic regime (for instance, the military coups in Thailand in 2006 and 2014) (Pion-Berlin, Esparza, and Grisham 2014). These examples show that the question of how to guarantee the subordination of the military to civilian control is of both academic and political relevance. In the post–Cold War era, military coups are no longer the main focus of literature dealing with civilian control. Such literature deals with issues of military influence on decisionmaking, the military’s public support/opposition to an announced civilian policy, and the degree to which the will of civilians always prevails over that of the military command (Feaver 1999).

In this volume, we seek to contribute to the body of civil-military-relations theory by linking security threats, militarization, and democratic civilian control of the military. We do so in ten case studies that
aim to answer three core questions: Why and under which circumstances do democratic governments mobilize the military to counter domestic and external security threats? Do democratic governments militarize the security discourse to legitimize the military’s deployment against security threats? What are the effects of the military’s deployment and the militarization of the security discourse on the democratic civilian control of the military?

Civilian Control, Security Threats, and the Need to Account for Militarization

Civilian control of the military refers to the ability of political leadership to decide what the military should do and does and to oversee its actions (Kuehn 2018). In democracies, where the political leadership is accountable to the citizens, this principle ensures that military operations as well as broader security, defense, and military policy (including military organization, funding, doctrine, equipment, and training) are linked back to the citizenry through state institutions, the media, and civil society (Bruneau 2006; Croissant et al. 2010; Levy 2016c). Democratic civilian control is effective when civilian state institutions (primarily the executive and representative branches of government) are able to set limits on the freedom of action of the military in a manner that corresponds to the political objectives that are autonomously shaped by politicians, and the military abides by these civilian directives (Levy 2016c).

Democratic civilian control of the military, then, entails a horizontal and a vertical dimension. Horizontal civilian control relates to the degree to which the democratically legitimized political executive is able to decide on military and security policy without undue influence by the military (regardless of the degree to which it is less or more war prone than elected civilians) and the extent to which military-related decisionmaking by the political executive is overseen, checked, and balanced by the legislature and judiciary. But if one of the core principles of civilian control is that the citizenry engages with military issues (Kohn 2002), vertical democratic control is also of significance. It refers to the degree to which the processes of military decisionmaking are tied to the citizenry (the demos) by means of deliberation. This mainly occurs through the democratic electoral process through which the political decisionmakers are
elected (and held accountable) but also involves the openness and transparency of security decisionmaking to media scrutiny as well as the inclusion of civil society organizations. These nonstate actors provide information about security, defense, and military policy and, thus, complement and enable state institutions’ control, direction, and oversight of the use of military force.

While there is considerable agreement on the core principles of civilian control, scholars do not agree on the relevance of explanatory variables in determining healthy civilian control or its absence. Given the role and function of the military as a state organization entrusted with the defense of state and society against threats (Kuehn 2018), it is not surprising that many scholars have highlighted the role of security threats in the relationship between civilians and the military. Many democracies, long established or more recently democratized, are challenged by serious security threats to the state and political and social order posed by human collective actors through (the threat of) physical violence.

External threats include international conflict between states, the proliferation of weapons of mass destruction, illegal migration, and international terrorism. Such threats can be considered by relevant actors (elites and a sufficiently large segment of society) to have the potential to challenge the survival of the state, the nation’s political sovereignty, or the normatively defined social order (Buzan, Waever, and de Wilde 1998), or its territorial integrity (Edmunds 2012), or a democracy’s “way of life” (Desch 2010).

Domestic threats range from large-scale organized crime and drug trafficking to domestic terrorism and armed insurgency. They can pose a threat to the territorial integrity of the state, to domestic security, to the state’s political order and institutional integrity, to the survival of the ruling elites, and even to the normative identity of a social entity (Buzan, Waever, and de Wilde 1998).

Regardless of the nature and origin of the threat, democracies have different options for reacting to security threats, ranging from ignoring them, to solving them through peaceful means, to containing or terminating them by force. Moreover, if a government decides to counter a threat by violent means, it has to mobilize public support and societal resources and then select an agent to fulfill these missions. Usually, this means deciding whether civilian state agencies, such as the police, gendarmerie, or intelligence services, or the military should be tasked. While in dictatorships the military is
often engaged in defending the regime against domestic challenges (Svolik 2012), in democracies the military’s role has traditionally been limited to defending the state against external threats, and it has been the mission of specialized police and paramilitary forces to meet internal security challenges.

However, in recent years, many democracies have deployed military forces not only in asymmetric external security roles, such as South Africa’s border security operations or Israel’s campaigns in Lebanon and Gaza, but also in an increasingly broader range of domestic roles. French soldiers, for instance, patrol cities in response to terrorist attacks, and Latin American militaries combat organized crime and armed insurrection. Furthermore, democracies also use other agents to deal with external threats, such as the drone warfare in Pakistan carried out by the CIA or the use of private contractors in the core state function of providing security. Finally, many democracies have militarized their police forces to deal with domestic threats. These new forms of deployment raise the question of how the presence of a threat and the military’s role in countering that threat affect the military’s political power and civilians’ capacity to discipline it.

Theorists are divided over the question of how threats affect control of the armed forces. The “garrison state” school of Harold Lasswell (1941) worried that empowerment of the military establishment in reaction to an external threat would undermine civil-military relations by letting the officers, as “specialists in violence,” run the state and impose their warlike inclinations on politics. In contrast, Michael Desch (1999) has argued that the impact of threats on civilian control depends on the nature of the threat—whether it is external or domestic. According to this argument, civilian control will be highest when external threats are high and domestic threats are low because (1) the military is externally oriented; (2) the civilian leadership is experienced and knowledgeable about national security and supplies the military with the resources it needs; (3) society is relatively unified and, as such, discourages the military from internal intervention; and (4) the civilian and military leadership share similar ideas on how to handle the threat. In such a case, the military will be distanced from domestic politics and nurture its professional ethos. In contrast, Desch expects that under low external and high domestic threats, the military is likely to be involved in internal security operations and will be politicized, which will lead to military empowerment and the erosion of civilian control (see also Andreski 1968).
Charles Tilly (1992) offered a structural argument in his “war makes the state” theory. Historically, the introduction of artillery and gunpowder in sixteenth- and seventeenth-century warfare led modern states to collect resources needed for a military buildup. In exchange, extraction of resources increased state-society bargaining and ultimately led to the centralization of political power, including the transfer of controlling military power from a dispersed feudal system to the central state. In turn, the military’s dependence on civilian supporters decreased its autonomy. From this it follows that if the military can draw on autonomously collected revenues (such as independent business projects) or is funded by external actors, it becomes independent of the democratically elected government, which reduces its willingness to submit to political control by elected civilians. Since state institutions increase their resources and are less threatened by their own military, Tilly argued that the elites who run the state might have an interest in the existence of external threats. Ultimately, he saw the state as a “protection racket,” selling security in exchange for the extraction of resources. Hence, elites had incentives to “simulate, stimulate, or even fabricate threats of external war” (Tilly 1985, 171).

This shows, however, that the presence or absence of an “objective” threat alone is insufficient to explain the degree of civilian control. What is missing here is the role of militarization, understood as the process that legitimizes the use of military force, actually or potentially. This legitimacy refers to a socially constructed system of norms, values, and beliefs held by the community of citizens that accepts (or rejects) the state’s use of the armed forces as (at least) a normal, pervasive, and enduring strategic option. Such legitimacy encompasses social beliefs about the role of the use of force in human affairs, the nature of the adversary and the threat it poses, and the efficacy of the use of force (Levy 2016c). Militarization reinforces the status of the armed forces and their cultural importance, generating cultural militarism “when the armed forces become essential to the social experience and collective identity, when they rank as one of the collectivity’s central symbols and the very embodiment of patriotism. Here public experience is enveloped in ceremonial endeavor dominated by soldiering and military professionals, and by para-militarist groups” (Kimmerling 1993, 202).

To emphasize, militarization is a process rather than an ultimate result of the creation of a society dominated by “militarism,” that is, by “a vast array of customs, interests, prestige, actions and thought
associated with armies and wars and yet transcending true military purposes . . . [displaying] the qualities of caste and cult, authority and belief” (Vagts 1959, 13–14). But militarization has often been developed from preexisting militaristic ideologies in civilian political culture, such as neoconservative and ethnonational ideas in the United States and Israel, respectively. Such an ideational infrastructure is often a self-reinforcing mixture of ideas and material interests. Consequently, militarization is not only a cultural-political but also a social process, as it stipulates the mobilization of societal resources for the military buildup. So, “civil society organizes itself for the production of violence” (Geyer 1989, 79), that is, for war preparation, including “the organization of large standing armies and their leaders, and the higher taxes or tribute used to pay for them” (Lutz 2004, 320). Of course, the legitimacy of using force can range from accepting the preparation for the use of force to supporting the actual deployment of the armed forces.

However, the military is not necessarily the exclusive bearer or addressee of such discursive and normative cultural processes. On the contrary, the military may even restrain politicians from using force (see Desch 2006). Also, subtler forms of militarization can emerge, which are often subsumed under the label of “securitization.” This process entails “actors identify[ing] an existential threat that requires emergency executive powers, and, if the audience accepts the securitizing move the issue is depoliticized and is considered a ‘security’ issue outside the rules of normal politics” (Salter 2008, 321). This suggests that the process of militarization can be driven by a multitude of actors, both military leaders and civilian agencies, elites and professions.

As of now, scholars who have discussed the interplay of threats and civilian control have largely ignored the role of militarization as a mediating factor. Desch’s (1999) structural theory of civil-military relations, for instance, while theoretically innovative and empirically very broad in scope, focuses exclusively on the direct effect of structural security threats on civilians’ ability to keep the military subordinated. However, it does not specify how threats are translated in the political realm. Militarization matters as it shapes the subjective dimension of an external threat to the same extent that it reflects the political and cultural dimensions of that threat. An external or domestic threat is not an objective entity per se but rather is understood and molded through a discursive construction (Wendt 1992). At the very
least, the evaluation of threats is subject to interpretation, which in turn is affected by various influences, including dominant ideas, politicians’ domestic considerations, and the varying perspectives, identities, and interests of different participants in the public discourse.

It is true that, according to Desch, military doctrine may play a greater independent role in affecting civilian control in less structurally determinate situations, as when both external and internal threats are high or low. Under such conditions, the military’s approach to using force can impact its bargaining mode with civilians and generate conflicts between the sides (Desch 1999, 18, 36; see also Schiff 1995). Nevertheless, military doctrine is only one aspect affecting the military’s use of force and, we argue, not independent from the broader social currents. Consequently, we understand specific principles of the use of force, such as military doctrine, as consequences of political culture in general and militarization in particular. Furthermore, the doctrine itself could be shaped by power relations between civilians and the military, as, for example, in democracies it is normally civilians who determine the mode of recruitment as a means to affect the military’s power (see Kier 1997).

In a similar vein, Tilly also disregarded militarization, despite its being an important aspect of the mechanism justifying the demand for protection through which the state recruited the resources needed for military buildup that in turn regimented the military. Inevitably, demand for protection is discursively reflected and might amplify or hamper militarization.

Lasswell, in contrast, is much more explicit in linking external threats and control through militarization, even though he never uses the term. For him, the persistence of an external threat allows elites to legitimize the erosion of democracy and the rise to power by military elites as necessary for the survival of society. Under these conditions, the ideational ground for the emergence of the garrison state is laid by an “adjustment of symbols, goods, and violence . . . [and] in the fundamental practices of the state” (Lasswell 1941, 461).

For the same reasons, militarization is crucial to linking domestic threats and civilian control. On the most basic level, a militarized discourse may help transform domestic social issues such as crime, border security, immigration, or ecological crises into security threats that have to be dealt with through military or other force-oriented means (Waever 1995). As a result of this process, police forces become militarized in their structure, training, equipment, and operations (Kraska
and/or the military is employed for tasks normally dealt with by the civilian police, such as combatting crime, domestic terrorism, or drug trafficking (Brooks 2016; Pion-Berlin and Martínez 2017).

Returning to Desch’s (1999) structural theory, domestic threats undermine civilian control because they may encourage the military to intervene in politics to counter an internal threat to its institution from state and society. Furthermore, group conflicts in the political arena are paralleled by conflicts among the representatives of the same groups in the military, thus constituting subjective control (Huntington 1956, 677). Domestic threats may also weaken the capacity of state institutions to extract resources for war making, thus providing fewer resources to the military and encouraging it to play a more autonomous part in national politics (see Tilly 1992). Lastly, domestic threats increase the regime’s reliance on repression and thus empower the military vis-à-vis civilians (Svolik 2012, 10). However, like external threats, internal threats are not per se objective truths but need to be interpreted and constructed as such. Nor is the deployment of the military as the most effective or legitimate response to such threats a natural given. Consequently, and paralleling the discussion of external threats above, the discursive social, political, and cultural processes in relation to domestic threats play an intervening role in mediating between security threats and civilian control.

As we have showed, despite the relevance of militarization for understanding the relationship between security threats and civilian control of the military, existing literature has thus far not conceptualized the link. Filling this vacuum is the purpose of this volume.

Structure of the Book

This volume aims at examining the interrelationship between security threats, the militarization of security policy, and civilian control of the military, with special attention to the missing link of militarization in translating threats into impacts on civilian control. Our main goal is to take steps toward a greater theoretical integration of these three aspects of civil-military relations in democracies that are challenged by security threats, based on a comparative empirical analysis of old and new democracies in Africa, Asia, Europe, Latin America, North America, and the Middle East.
The main body of the volume, therefore, consists of ten empirically rich, in-depth country studies of old and new democracies that are confronting domestic or external security threats. In line with our goal of theory building and in order to capture as broad an empirical range as possible, we selected the cases based on three criteria (see Table 1.1):

1. *The nature of the threat:* We included cases that are challenged by external threats (e.g., Israel, South Korea) and whose main threat stems from domestic actors (e.g., France, El Salvador).

2. *The degree of militarization:* We included countries where militarization has occurred (e.g., South Africa, Colombia) and where militarization has not (yet) occurred (e.g., Japan, Senegal).

3. *The age of democracy:* Our sample includes “new” democracies that have made the transition from authoritarianism during or after the so-called third wave of democratization (i.e., post-1974; see Huntington 1991), as well as countries whose transition to democracy happened before that date.

The case selection thus focuses on “diverse” cases (Gerring 2016), which capture the range of variance on the relevant independent and intervening variables (threat and militarization), while not selecting on the dependent variable (civilian control).

Based on the conceptual framework and proto-theoretical ideas outlined above, each of the ten case studies is motivated by the following questions:

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<tr>
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<tr>
<td></td>
<td>South Korea (new)</td>
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<td></td>
<td>United States (old)</td>
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<tr>
<td>No</td>
<td>Japan (old)</td>
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*Table 1.1  Case Selection Criteria and Cases*
1. What are the main threats?
2. How do democratic leaders react to these threats? Do they deploy the military (and how), or do they use other means (civilian security agencies, diplomacy, politics)?
3. How are the main security threats defined, shaped, and interpreted by the elites, the military, and civil society groups? What is the role of the existence of a previous militaristic infrastructure in the civilian political culture in this process? Does this process reinforce or mitigate militarization (or securitization) through the imperative to legitimize the use of force to counter the threats, and if so, how? If not, why not? Does this process affect the tools used, whether military deployment and buildup or other mechanisms, or not?
4. What are the effects of militarization (or its absence) on civilian control of the military?

The remainder of the book proceeds in three parts. Part 1 includes case studies of new and old democracies challenged by external threats.

In Chapter 2, Yagil Levy argues that, until the 2000s, Israel exemplified a direct relationship among the level of external threats, militarization, and the autonomy of the military vis-à-vis civilians, while the period that followed showed that nonexistential threats had a dual impact on civilian control of the military. They spelled out demilitarization that limited the military’s autonomy. At the same time, it is precisely the de-existentialization of threats that enhanced the politicians’ dependence on the “legitimation services” of the military when they strived to use force, while de-existentialization reduced the public interest in military affairs, hence reducing control.

In Chapter 3, Eyal Ben-Ari argues that successive governments in Japan responded to external security threats by legalizing actions of the military, thus overcoming historical and cultural constraints. These material developments have been reinforced by discursive processes of remilitarization. However, since all the stages of militarization have been variously opposed, critiqued, or moderated, several mechanisms, such as electoral changes and internal ruling party pressures, have held Japan’s governments accountable for their actions and limited their leeway in overly militarizing the country.

In Chapter 4, Insoo Kim analyzes the South Korean government’s attempts to impose on the military restrained rules of engagement in response to the North Korean military’s violation of the mar-
itime border between the two Koreas in the Yellow Sea (the Northern Limit Line). While it could be expected that the military would obey the instructions by refraining from using force even in the event of North Korean provocations, Kim argues that the media played an important role in harming civilian control. By amplifying the image of the North Korean threat, the media militarized the security discourse, while often criticizing the more restricted policies of the government. This encouraged the military to use force against enemy provocations in violation of the government’s instruction.

In Chapter 5, Alice Hunt Friend and Lizamaria Arias investigate the complex interactions among transnational terrorism, a militarized security discourse, and civilian control in the United States. Although they highlight that the United States had not been a stranger to a militarized security discourse before September 11, 2001, it was only after the terrorist attacks that transnational terrorism was considered a problem that should be addressed by military means. In a meticulous analysis that combines positivist and ideational perspectives, they show the specific interplay of the objective material conditions of a qualitative change in the terrorist threat and its subjective interpretation by elites and the populace—and its impact on both the use of military force and civilian control. The impression that the country (as well as its allies) is embroiled in a Manichaean war of “good” versus “evil” engenders a “rally-round-the-flag” effect around the chief executive, and military action becomes the logical and righteous response—especially if it comes with little threat of large numbers of American casualties. The consequences are a self-imposed enfeeblement of the legislature and a preference for “surgical” special operations, which together undermine democratic accountability and weaken civilian control.

Part 2 includes case studies of old and new democracies that are challenged by domestic threats. In Chapter 6, Samuel Rivera-Paez analyzes the effects of Colombia’s decades-long experiences of a counterinsurgency war against well-organized guerrilla armies and the rise of powerful drug cartels as challengers of the state. He maintains that Colombia has a unique political structure based on close cooperation between the elites. Therefore, the military’s maneuvering power has been limited, and its leadership internalized principles of subordination to civilian authorities. Furthermore, this cooperation between the elites enhanced the legal system, which, in turn, further limited the military’s autonomy. Based on this infrastructure, even when deployed to address domestic threats, the military grasped the
idea that to win in the battle, legitimacy is essential, and therefore further obeyed the civilians’ directives.

Violent crime and the legacies of a long and bloody civil war are also at the heart of Sabine Kurtenbach and Désirée Reder’s analysis of El Salvador (Chapter 7). They argue that some progress has been made in the more than twenty-five years since the comprehensive Chapultepec peace agreement ended the twelve-year civil war in reforming the security sector and increasing civilian control over the military. However, they also show that Salvadoran governments of both major parties continue to rely on exceptional legislation to deploy military forces in the fight against rampant crime and youth gangs. This not only is a breach of the peace agreement but, coupled with impunity for human rights violations, leads to excessive levels of violence by the state security forces and weakens effective civilian control over the military. Kurtenbach and Reder show how these patterns are legitimized and reproduced by a heavily militarized discourse that demonizes youth gangs as the main perpetrators of violence. As such, the discourse, actively promoted by the traditional oligarchy that continues to dominate state, economy, and society, succeeds in concealing the socioeconomic conditions of exclusion and inequality that are the underlying reason for violent crime in the country.

In Chapter 8, Chiara Ruffa analyzes three waves of securitization in France between 1995 and 2017 as a response to transnational terrorism that posed domestic threats. Although in all waves the government performed domestic policing, the type of securitization differed sharply under the three presidencies studied, with important ramifications for civilian control. While the norm of civilian control held strong, the combination of the president’s relative power position, the military’s propensity to perform domestic tasks, and its interest in doing so results in different types of securitization and different levels of erosion of civilian control. In general, the military accepted new policing missions and guaranteed obedience in exchange for more resources. From 1995 to 1998 under President Jacques Chirac, a heightened transnational terrorist threat led to the deployment of the military in domestic policing and increased the politicians’ dependence on the military. On its side, the military converted this dependency into bigger budgets following abolition of the draft, mainly in the form of new missions and increased, albeit limited, status in decisionmaking. During the terrorist attacks of 2015 and 2016 under President François Hollande, the
government traded display of power in the streets and pure policing roles by a reluctant military for a more robust upgrade in the military’s status in decisionmaking. Later, under the more powerful President Emmanuel Macron, the policing roles of the military were reduced and replaced by nonmilitary measures, and so the military’s level of autonomy and status in decisionmaking was also downgraded.

In his analysis of Senegal’s experience with armed separatist rebellion in the country’s southern Casamance region, Jahara Matissek stresses in Chapter 9 that the severity and regional location of the threat affect a state’s reaction to domestic challenges. He starts out with the puzzle that Senegal, which maintains a large military that is often considered one of the most professional and effective armies in Africa, has not suffered to the same degree as its neighbors from praetorianism and military intervention into politics. Moreover, the military never was considered the state’s primary instrument to fight the separatist insurrection in the Casamance, despite the civil war having led to over 5,000 deaths and about 60,000 displaced persons since its outbreak in 1982. Matissek argues that this is because the conflict was successfully contained in the relatively isolated and peripheral Casamance region and never spilled into Dakar or other urban centers in northern Senegal. While military troops participated in counterinsurgency operations as support for the civilian police and gendarmerie, the Casamance problem was deemed resolvable mainly through a crime-fighting approach. Under these circumstances, political and military leaders never had the political capital or need to fully militarize the conflict, elected civilians had no issues controlling their military, and the armed forces saw little incentive to fight in the Casamance.

In Chapter 10, Lindy Heinecken argues that while there is an underpinning relationship between threats, militarization, and civilian control in South Africa, the relations are not always linear. When the threat perception is high, the security of the state and citizenry is threatened, and militarization is elevated, civil control may be compromised, especially under an authoritarian regime, and vice versa. However, remilitarization, as a response to rising domestic threats, compromises civilian control to the extent that remilitarization is promoted by the military and enhances its power, while, as the case of South Africa shows, remilitarization promoted by nonmilitary actors has a lesser effect on civilian control. Then the challenge is not controlling the military as an organization but, rather, controlling the violent means of the polity.
In Chapter 11, Rafa Martínez and Oscar Jaime make a similar point as that made in Chapter 9 in their analysis of Spain’s fight against Basque nationalists and Islamist terrorists. Despite the considerable terrorist threat faced by the Spanish state and society, unlike in France, the Spanish armed forces were never seriously considered as a useful instrument for domestic antiterrorism. This, Martínez and Jaime argue, is due to both material and ideational factors. Materially, the Spanish state could draw on well-developed civilian police, intelligence, and security agencies, especially the paramilitary Guardia Civil, which enabled a relatively effective containment and prosecution of terrorist organizations through criminal procedures. Ideationally, the military’s involvement in domestic affairs was and continues to be delegitimized in large segments of Spanish society after decades of Francoist rule in which the military was a core pillar of the repressive regime. Under these conditions, the militarization of antiterrorism operations was neither functionally necessary nor politically viable, which, in turn, also contributed to the successful and swift consolidation of civilian control over the military in the 1980s.

Drawing on the individual chapters’ empirical insights, Part 3’s Chapter 12 by David Kuehn and Yagil Levy concludes the book. The chapter summarizes the findings and translates them into theoretical conclusions on the relationship between security threats, militarization, and civilian control. Our main theoretical insight, drawn from the cases under study, is that a perceived severe external threat increases the autonomy of the military vis-à-vis civilian control. This happens if threats lead to militarization—the missing link in the literature—rather than being addressed by nonmilitary means. However, when war preparation requires the mobilization of significant societal resources, this linearity is disrupted, and the process enhances civilian control as it encourages monitoring of the military by the sacrificing groups. This linearity between the three variables generally moves in the reverse direction when external threats decline and demilitarization rises. At the same time, reinforcement of internal threats will most likely negatively affect civilian control if the threats are militarized and entail military deployment. Civilian control is less affected when nonmilitary means are deployed. The chapter ends with suggestions about how to proceed toward testing these theoretical ideas empirically.