ARTICLE

Reflection on the Future of the Military Transformation

Jaime Guillermo García Covarrubias

https://orcid.org/0000-0001-5426-5328
jotagece20@gmail.com

© Peruvian Army Center for Strategic Studies 2022. This is an open access article, distributed under the terms of the Creative Commons Attribution License (http://creativecommons.org/licenses/by/4.0/), which allows reuse, distribution and reproduction in any medium, provided that the original work is properly cited.
Reflection on the Future of the Military Transformation

Jaime Guillermo García Covarrubias

Abstract

This article analyzes the essence of military transformation and proposes a methodology for its better understanding and application for an armed organization. It is suggested that military transformation be a permanent process of adaptation, not only in the face of new forms of conflict but also in the face of changes that occur in the sphere of society. Therefore, the understanding of the triads of the areas involved in the analysis methodology acquires significant importance. Threat vectors are also presented, warning that their normal uniqueness will be a combination of these dangers. In this sense, the development of disruptive technologies and their effect on the cognitive and social sphere require special attention since they will shape the years of present and future generations.

Keywords: Pillars of Military Transformation, Military Capabilities, Threat Vectors.

Introduction

The Military or Defense Transformation (with capital letters) took a fundamental turn when the United States, more than a decade ago, decided that this was not an extraordinary process, but that it was a habitual evolution of its military forces, in accordance with the demands of the new forms of conflict. In the case of Latin America, at the beginning of this century, several countries began this process and then continued with an inertia that, at times, made them lose focus on where they should go because the modality acquired in the United States, mentioned above, was not considered. Therefore, the big questions are: “What?” and “Why transform?,” to later fix how to carry out the tasks, stages, deadlines, coordination and many aspects that involve changes of such magnitude. The impact of the transformation in the United States, which was typical of the needs of that country, resulted in other countries initiating this process without being clear about the objectives of their own realities.

1 For the formulation of this article, the author thanks the contributions of Major General (R) Jorge Peña, of the Chilean Army, who participated in the Chilean transformation project.
In Latin America there are precedents and analyses that need to be considered before any transformation, restructuring, reform or relevant changes in national defense that involves examining sociological aspects of high impact and the reality of threats, especially in the current context. In the case of the United States, its orientation was fundamentally technological, deriving from there other aspects. I know this case in some depth because my academic stay at the Center for Hemispheric Defense Studies (CHDS) coincided with the rise of the transformative process initiated by the Bush–Rumsfeld duo.

In order to understand the process in its full magnitude, I participated in various courses, seminars and meetings where its essence was discussed. This knowledge was reflected in various documents published in English, Portuguese and Spanish. In that sense, the biggest difference with the United States is that the countries of Latin America do not have the strategic commitments, nor the resources, in addition to the fact that, in some cases, their military forces do not have the social legitimacy, or the political support required to follow or imitate the process of a world power such as the United States.

This work is a reflection and does not intend to give recipes on what to do. Its purpose is to show those essential elements that must be present in the processes of optimization of military apparatuses, whatever the name that each country assigns to it. Transformation is no longer an exceptional act but is part of a normal evolution of the institutions.

In this context, there are many elements of analysis that could be considered. However, this article will address three central axes. The first axis consists of the methodology of analysis in order to decipher the content and essence of an army, being fundamental to use it for any study related to the military

---

apparatus. The second axis focuses on a synthesis of the evolution of society and how it has affected national defense and threats. Finally, the third axis consists of unambiguously identifying the origin of the threats, since – derived from a model of relationship typical of a free economy – the root and conduct of the threats are confused. Therefore, urban crime, drug trafficking and terrorism are mixed, often for vindication causes, having an impact on an approach that superimposes the traditional role of defense in its external sphere with internal security. All these factors impact on the military function of Latin America and, therefore, on any transformative process.

Analysis methodology to know the military apparatus

In previous works I have proposed two methodological triads called “Pillars of Military Transformation” (see figure 1), in order to understand the armies regarding the dynamics produced by society and its internal group. With regard to the first triad, the first thing that must be known in an armed force – with respect to its society – is its nature. Therefore, it is very important to bear in mind that this principle generating the military function starts with the origins of man, being history the one that accounts for the evolutionary basis of men and institutions. The second thing to consider is the legal norm, composed of regulations that organized society establishes through its laws; otherwise, it would be in a state of wild nature and the armed force would be uncontrollable. Finally, the third thing to take into account are the capabilities, which are the instruments that society delivers to the armed institutions so that they comply with their nature, according to the established legal norm. These three basic elements are united and coordinated by doctrine, which is understood as the discipline that resolves the antinomies between a theory and practice or reality. Consequently, doctrine documents will have to be consistent with the nature, legal norm and capabilities for which they have been chosen.³

In the United States, the transformation focused especially on capabilities. However, when we talk about transformation processes in Latin America, the first question that society asks is why do we want armed forces? Therefore, you must be very aware and have many foundations to understand the nature of what you are going to propose to change or even eliminate. To do this, it is necessary to observe in detail that all changes are framed in the fundamental origin of the organization so as not to distort the essence of its creation. In this sense, it can be said that *nature, legal norm* and *capabilities* are the three pillars of a transformation process of the armed forces with respect to society.

However, how can nature be identified? Mainly because of the *eidos*, which is the original idea when the first rational *sapiens* were organized to subsist, fight and create institutions for a social need. In simple terms, *eidos* is a Platonic philosophical concept and *ethos* is the concept that has been arrived at today. There is a whole path traveled that shows that *nature* is not only the beginning, but the current point. The above presents a great subject of study, which forces us to understand who exercises the command of the armed forces and by whom they will exercise it in the future. In this context, it is very important that the *legal norm* is in accordance with *nature*, and capabilities with both. If the armed forces are provided with instruments that do not help them to comply with their *nature* and that are not in accordance with the *legal norm*, these armed forces will be absolutely sterile. Therefore, this is a model for understanding the phenomenon, which must be understood and extracted from each reality. This means that the transformation of some is not necessarily the best option for others.
With regard to the second triad, it can be said that it comprises the three fundamental bases of a military apparatus oriented to the military field. On the one hand, the first of these foundations is honor, which represents commitment that is beyond what is written in the mission. The armed forces are the only institutions that swear to give their lives for the homeland, although that is not written somewhere. If you review the Constitution of each country, you will not find one that demands to die for the sake of being a soldier. Giving one’s life for the homeland is a symbolic oath of the military, not having the legal obligation to fulfill it. So, what prevails: the constitution, the laws or the symbolic oath? In this context, honor turns the symbolic oath into personal commitment, above regulations that do not require sacrificing life. However, this honor must be consistent with the legal norm described above. Consequently, all these oaths of adherence to the homeland until death are, intrinsically, more symbolic than legal. Only the code of personal honor will account for such an extreme promise in a world like the one we live in, which is fundamentally legal. Therefore, specialists in military sociology agree that there is a transition from a traditional concept of honor to a legal concept in modern armies.

On the other hand, the second of these fundamentals is organization, while the third is discipline. If you have honor and organization, but you don’t have discipline, you will have sterile armed forces. If you have organization
and discipline, but without honor, you will have armed forces lacking the standards expected of a modern state. If you have discipline and honor, but without organization, there will be no structure that allows you to channel the processes of operation. Therefore, in order to have a military force at its maximum intensity of capabilities, the fundamental aspects described must be considered.\(^4\)

These two triads, in theory, could produce a kind of dissonance between military culture and civil society. In that sense, the adaptation of an army to society will be slow and sequential, since military institutions will evaluate and incorporate the changes with caution and graduality in order to safeguard their efficiency. Consequently, the evolution of society must be analyzed in order to adapt in a timely manner to the military force, being essential that when modernizing or transforming a military force a congruence is established with the changes of society. For this, it is essential to have a correct interpretation of the degree of evolution of society and where it is headed. The high commands of the armed institutions will have a great responsibility incorporating what is verified as appropriate, without weakening military capabilities or constitutional military duties. For this task of institutional evolution, the triads presented are fundamental, since the backbone of an army is in their components.

The military values that guide the profession must be consistent with the military virtues of each one and must be taken care of and deepened. Military values are the same as those practiced by civil society, although their hierarchy is different. For example, patriotism – as a value – may be at the top of the hierarchy made by the military; on the other hand, for a doctor it could be that the main value is service to others, which does not mean being less patriotic. Likewise, bravery will be very important for a soldier, but it will not be so important for other professions that prioritize other qualities derived from their own purpose. Consequently, military values and virtues are not abstract concepts since they are clearly described in the regulations

\(^4\) Ibid.
of discipline and codes of military justice of the armed forces, being the obligation of every soldier, sailor and aviator to know and practice them. In short, in a society there will be global values and sectoral values (such as military values), constituting common values, but with different hierarchy.

In times of crisis or wars, military values are evident since the population, in the face of danger, recognizes military capabilities and values. Therefore, it is more difficult to substantiate or legitimize an armed force in periods of peace than in periods of conflict or war. However, the problem is the discordance that can occur between the values considered as ideals of the organization, with respect to the values of the people, because –after all– there are values that are personal, and there may be some member of the institution who disagrees with some value of the organization. Humans are not programmable machines; therefore, the absorption of values and their practice will be an individual task and effort.

**Trend of today’s society**

Somewhat older generations are witnessing how the philosophical and sociological paradigms that have ruled for centuries are collapsing, and how new trends are beginning to appear. These new trends are impacting all organizations, especially armed institutions that have been traditional and disciplined. For centuries, they have lived under an anthropocentric paradigm, based on the idea that man is the center of humanity (considering women a counterpart), which replaced the old theocentric idea in which God was the center of society. Under these two notions that were strengthened and synthesized in time, modern armies as they are known today were forged.

During the twentieth century, authors of proven wisdom have tried to make this evolution of human society known, granting them different names and features (such as modernity and postmodernity), where individualism reigns as a fundamental singularity. This individualism has reached such relevance that the younger generations blame all the ills of society on the economic model typified as *neoliberalism*. 
If we were to seek to rescue some distinctive element of what happened, the most remarkable thing would be to point out that there has been a redefinition of the notion of the human being in the twenty-first century, overcoming the previous definition and reinterpreting the human being with respect to his various environments. Traditional certainties therefore give way to a human being who repudiates binary power statuses, such as sex, race, social class and others. In this scenario, the human being is rethought in the context of this new reality that, by the way, is not random and that also has degrees of ideological mobilization, reflected in generational differences.

In the end, it is about the human being seeking his perfection in a scenario where he is only a part and not the whole, living according to other species and a technology that has to be at the service of humanity. Society is expected to think in terms of relationship, coexistence, empathy, otherness, and interconnectedness. This philosophical-sociological stance – for some known as posthumanism – is partly explained through the concepts of liquidity of institutions and customs. For example, Polish sociologist and philosopher Zygmunt Bauman pointed out that the search for identity is an enterprise to build oneself and that it is the ultimate source of rootedness. Hence the urgency of obtaining a flexible and versatile identity that adapts to the different mutations that the subject faces in his life. Identity is configured, therefore, as a reflective responsibility that seeks autonomy from the rest and constant self-realization.

In that sense, Bauman explains his concept as “the process by which the individual has to go through in order to integrate into an increasingly global society, but without a fixed and very fickle identity.” Identity has to be created or molded to move from a solid-stable and repetitive modernity to a liquid-flexible and fickle one, in which social structures no longer endure over time to solidify and, therefore, frames or referents do not serve. In his work entitled “Liquid Modernity,” Bauman analyzes the factors that impact this type of society such as emancipation, individuality, time-space, work and community. An interesting aspect of his thinking is that he adheres, like liberals and anarchists, to a spontaneous order of society and not to social
engineering, which he criticizes in his book “Modernity and the Holocaust.” This would explain the fact that human beings seek with greater emphasis to organize themselves in freedom and that social models are not imposed on them.5

The digital revolution (also called the third industrial revolution) and the progressive development of disruptive technologies (such as artificial intelligence, among others) make us see the structuring of a new type of society. Therefore, society must adapt quickly to the changes brought by the digital revolution and be very attentive to how the emotional or less tangible aspects that accompany the human mind will be incorporated into artificial intelligence. To this is added the already announced fourth industrial revolution, which tends to integrate with transhumanism, and which had its first steps in the 1980s at the University of California. Therefore, changes and new technological programs are overwhelming and must be incorporated into any work aimed at transforming the military apparatus.

The missions of the armed forces

The scenarios and, at the same time, domains where the armed forces carry out their missions are land, naval, air and, in recent decades, cyberspace. In the future, the armed forces will continue to exercise the following four classic missions: dealing with conventional conflicts, peace operations, support for national development, and unconventional operations. In this context, the task of any Ministry of Defense shall always be to place these missions in order of importance in determining the corresponding budgetary allocation.

Conventional or classical missions, aimed primarily at resolving hypotheses of conflicts between States, are closely linked to the nature of armed institutions and require a military apparatus closer to the traditional one. Additionally, there are the strategic commitments expressed in international

---

operations. Currently, operations in peace missions have achieved great value, providing - in addition to international prestige - experience and benefits to the participating military force. Therefore, these types of operations will be increased and will require greater staff preparation. Likewise, another mission is the social participation of the armed forces or their contribution to national development, this being a non-purely military mission. Perhaps the most convenient thing is to understand that this type of missions (which are not of military use) should not distort the main function of the military institutes, being executed as a subsidiary mission and not as a fundamental mission. Finally, there are unconventional missions, which since the Williamsburg meeting forward have been the way to identify the use of military force in the face of new threats.

Over the years, almost all new threats (initially typified) have ended up weakening, with the fight against terrorism still remaining in force. In general, Latin America (except Argentina, Peru and Colombia) has not suffered major terrorist threats, so terrorism is identified as an internal problem of resolution by law enforcement. However, if exceeded, it could - under the law - consider the use of the armed forces, which would be exceptional. Chile and Argentina remain in that position, but it must be recognized that it is not the reality of the region, since in Colombia, Brazil, Peru and in several Central American countries the use of military force in the internal struggle is foreseen. Indeed, the phenomena of highly dangerous crime existing in the favelas (in Brazil), the “Maras” (in Central America), the internal war (in Colombia), the armed insurrection in the VRAEM (in Peru) and the violence generated by the drug cartels (in Mexico) force the use of military potential in those countries. In Chile, increasing violence in the Araucanía (or Macrozona Sur) region, including ethnic conflict, has forced the government to rely to some degree on military presence. For its part, the attacks suffered by the United States in September 2001 and the global fight against terrorism undertaken by this power have generated that this area reaches great preponderance, with the United States going so far as to ask its friends and allies to strengthen cooperation in this area.
In this regard, countries that have militarized police, as in the case of Chile (although if the proposal of the new Constitution is approved, it would imply a change in this model), must technically adapt the police institution to face the new modalities of action that have been accredited with violent threats. As is known, the militarized police have all the preparation, skills and experiences to apply solutions from criminal acts to border protection. Therefore, there is no reason to think about involving the armed forces, unless the police are overwhelmed in their capabilities, which must be established in the law. What the armed forces can effectively collaborate on is to provide complementary support (intelligence, as well as logistical and technological support), and the entire state apparatus must also become part of the solution.6

Likewise, at some point the incorporation of the protection of natural resources as a mission of national defense was used, which does not represent any novelty since the protection of territorial integrity inherently includes the natural resources that are within the territory.

**Strategic threat vectors**

The current *strategic security problem* is determined by a series of circumstances that are potentially present, which I have called or *strategic vectors of threats*. Some of these circumstances were typified in the early 1990s as *threats*, but, over time, rather than threats in themselves, they behave as *threat multipliers*. This means that when faced with a threat, it will not necessarily present itself as an event with defined and understood limits of action, but that a threat will most likely be combined and enhanced by other problems that they will transform the phenomenon into a more complex security issue.

In this sense, these problems are called strategic\textsuperscript{7} vectors of threats, including: (1) cultural conflicts with associated ideologies; (2) the advancement of science and engineering and the proliferation of disruptive technologies without control, especially the use of cyberspace to produce damage, without restrictions of time, objectives and space; (3) globalization, including its positive and negative integrations; (4)\textsuperscript{8} weapons of mass destruction, particularly those of a chemical and biological nature due to the simplicity of their production and ease of use; (5) international and national transparency, aggravated by drug micro trafficking and to which organized crime is added when it reaches a more established provision, increasing its damage by having international ties; (6) the empowerment of the weapons of internal criminals in the countries, which in some cases requires the use of armed forces since they are the only ones that can match their power; (7) the concentration of water, energy and food resources, making them likely causes of future conflicts; (8) ecological deterioration versus development, inserting itself into the planet without the need to destroy it (trade off); (8) internal displacement and massive and uncontrolled migratory movements, protected by organizations that do not suffer from its consequences; and (9) conflicts framed in a gray area (such as the generation of insurgency, anarchism and generalized violence), taking advantage of social claims and stimulated by disinformation to exert influence in the cognitive area.

However, it must be emphasized that a threat includes human intent and will, as well as the ability to produce harm, requiring a strategy to defeat it. Different will be the natural events (such as tsunamis and earthquakes, among others) that are inevitable and can generate catastrophes, so that...

---

\textsuperscript{7} Some of these vectors are found in “The contemporary operational environment” TRADOC, Intelligence Support Activity, TRISA, Threats, Ft Leavenworth, KS. 2007. In saying text they are called “Drivers”, in English.

\textsuperscript{8} At this point, I have the intellectual and academic conviction that the concept of “globalization” is being used too lightly and that often, when the arguments are lacking, we cling to globalization and with it we try to explain phenomena that are often contradictory. Currently, globalization is cause and effect, so it is very convenient to identify these circumstances and not place them all on the same plane. Therefore, this area requires a meticulous analysis and above all a careful operational process to clearly identify the positive and negative aspects of each particular case.
only prevention and coordination measures can be applied, including the development of capacities to minimize the risk of disasters. In that context, whenever a strategic security problem is faced, some or all of these vectors will determine, enhance or distort it. Therefore, in certain circumstances, one of these vectors will transition a major security issue to a critical security problem.

Another ingredient of this new strategic situation is the so-called asymmetric warfare, which for some arises from the work entitled “Fourth Generation Warfare: Another Look”, in which the authors (William Lind, John Schmitt and Gary Wilson) complement an idea in the same direction as an article published years earlier. Therefore, it is also called Fourth Generation War. However, the origin of the concept is not univocal since it was initially linked to the danger of rogue nations or former Soviet states in Central Asia, which after the collapse and disintegration of the Union of Soviet Socialist Republics would have been left with weapons of advanced technology, including nuclear. Probably, as a result of the conflict in Somalia, the concept begins to evolve based on the fear of the Soviet states of the terrorist threat, merging into a single idea. In 1997, General Henry Hugh Shelton, who had experience in special operations, already used the concept with the current interpretation when he assumed the position of chairman of the Joint Chiefs of Staff of the United States.

In this regard, the following could be said: (i) the original interpretation of the concept of asymmetric warfare is American and has evolved, adjusting to the different asymmetric threats that the United States has been visualizing; (ii) the United States interprets asymmetry from the perception of the most powerful to the one with the least strength; (iii) the minor adversary does not

represent a state or possess conventional forces, being outside international recognition; and (4) the lesser adversary carries out terrorist actions since it is his only option. It should also be borne in mind that asymmetric warfare – in its original connotation – does not refer to the imbalance of the appreciation of forces that always occurs in any conventional war but refers to a different situation. For this reason, European and Chinese authors have expanded the original concept, giving it an almost holistic or total war character. Within this evolution, currently, the concept of hybrid wars is more commonly used.12

**Conclusions**

In the superior security reference framework, it is essential to carry out an in-depth analysis of the security problems of each country to determine the role of defense against these strategic vectors of threats, which facilitates the definition of public policies or strategies in the field of security (of a multidisciplinary nature), when there is a formal State security structure.

This area is scarcely treated in Latin America due to the lack of this structure, so its void has been filled through Defense. However, the use of the armed forces is insufficient for the breadth of the areas involved in the problem, with the implications of approaching a security issue that is not exclusively military in nature. In this regard, it is necessary to strengthen coordination between the police and the armed forces for the proper use of the latter in the face of security threats that arise in the internal order. However, the fundamental thing is that whoever confronts them has the necessary and sufficient capabilities, more than if they are police or military.

On the other hand, the sociological changes that impact and influence the organization of the military forces to open up to society and its changes must be considered, instead of refusing them, but taking care that their

---

societal adaptation does not harm their necessary capabilities and their nature. Accepting that the armed forces will act in scenarios where the population claims freedoms over the authority of the State, involves considering a potential rejection by this population of the institutions of order and authority of the State, especially when at present it is very difficult to identify the primary essence of the threats and their links. The above implies that in order to avoid strategic surprises and have opportunities, as well as to have an efficient work of the State intelligence system and its dependent agencies, legislation is required that allows a collection of quality information and that facilitates the coordination and exchange of information between organizations through clear procedures by the authorities and users of the system.

Likewise, there is a lack of understanding about the risks that derive from the digital world, due to the perception that they are matters related to specialized people and organizations, so a transversal operational scope is not established as an indivisible part of the information of people and of each human activity. In this context, disruptive technologies can cause greater damage, particularly in the cognitive and social area. Finally, military or defense transformation must no longer be an exceptional process as in its origins; on the contrary, it must be a habitual, dynamic and permanent process.

**About the author:**

Jaime Guillermo García Covarrubias is Brigadier R of the Chilean Army, PhD in Political Science and Sociology from the Pontifical University of Salamanca (Spain) graduated *Summa Laude*, magister in Political Science from the University of Chile (Unanimous Distinction), diplomate of the Center for Strategic Diplomatic Studies of Paris (France) and holds studies in History with Dr. Pierre Chaunu at the University of Paris IV Sorbonne (France). He has also been Professor of National Security Affairs at the *Center for Hemispheric Defense Studies*, in Washington DC (2001–2014), director of the Chilean Army War Academy (1995–1997). He is a professor in various universities in Chile and abroad, as well as an author of various publications in his specialty.