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Abstract

This is a multination study of military disobedience in the face of presidential orders to suppress civilian uprisings. Rather than coercively manipulating the government or seizing power themselves, these insubordinate armies prefer to remain quartered. To determine why, the authors draw on rational, ideational, and structural analytical perspectives on military behavior. The study deploys a qualitative case study method of analysis, identifying seven positive cases (disobedience) and then contrasting those with three negative cases (obedience) to discern whether there is a collection of causal agents that can discriminate between these sets. It finds that disobedience grows out of material grievances, stronger affiliation with public as opposed to government interests, rejection of internal public order roles, illegalities, and splits within the services.

Keywords

Civil–military relations, military quartering, military disobedience, military shirking, civilian uprisings, civilian protests

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The failure of a civilian regime to subordinate its armed forces can have serious repercussions. The most familiar symptom of a complete breakdown in political control is the military coup d'état. But in the terrain between coups and subordination lies a space where soldiers disobey orders without intervening politically. Unlike praetorian militaries, these armies do not seize power themselves, nor do they actively impose their own political and ideological agenda on either the government or the governed. Instead, they prefer to remain quartered or on the sidelines. They do so in the context of massive, largely nonviolent civilian uprisings that aim to bring down governments or entire regimes. Political leaders, desperate to silence the uprisings, request the assistance of their armed forces when the police have been overwhelmed by the sheer size and persistence of the demonstrators. When militaries refuse to oblige, presidents have invariably fallen from power. Hence, though relatively passive, these forms of insubordination have had powerfully disruptive effects. What then motivates soldiers to refuse official orders to repress?

This multinational qualitative study examines seven cases of military disobedience and three cases of military obedience, across numerous regime types and regions. It argues that disobedient militaries are driven by rational, ideational, and structural imperatives. As rational actors, militaries are interested in maximizing their material well-being and retaliating for material losses at the hands of the political authorities. As ideational actors, militaries reflect on how assigned responsibilities and roles cohere or not with their professional identities. And as organizational structures, militaries estimate how following orders will affect the internal cohesion of their institution.

Theories on military disobedience are reviewed to demonstrate why militaries are motivated to shirk their duties. This is followed by a more detailed discussion of how the specific factors could either enhance or inhibit a military's desire to follow orders to repress civilian protesters. The qualitative methodology is delineated, including a discussion of case selection. Empirical findings are presented and explained, with attention paid to analyzing the differences between disobedient militaries and those that followed orders. Alternative explanations for military defiance are considered, followed by concluding observations.

Theoretical Perspectives on Military Disobedience

Soldiers who openly flout civilian orders are insubordinates. Military insubordination has been a central topic of civil–military relations (Farcau, 1994; Luttwak, 1968; Nordlinger, 1977). There is a full spectrum of insubordinate

behavior, with coups at one end and lesser forms of defiance at the other end (Finer, 1988). In between, there are many varieties of disobedience that can be arrayed according to the means and ends pursued. For example, praetorian, coup-minded soldiers will use violence for the most ambitious of goals: the overturning of governments (Huntington, 1968; Perlmutter, 1977) while occupying office themselves. Some officers rebel against senior commanders but stop short of seizing power (Norden, 1995). Rather than governing or rebelling, other militaries exert influence behind the scenes, setting policy boundaries, exerting vetoes, blackmailing politicians, and issuing threats should civilians not cooperate (Finer, 1988). Still other militaries refrain from coercion but still attempt to exert influence via arbitration or negotiation. In each of these cases, the military is politically ambitious, interventionist, and aggressive.

By contrast, the military insubordinates studied in this article are more restrained in their means and ends. They neither use coercive force nor threaten its use. They act without political ambition, seeking neither to gain political office nor to expand their political influence via intimidation or negotiation. They act defensively by withholding cooperation with civilians and withdrawing to their barracks instead of fulfilling orders to repress (Pion-Berlin & Trinkunas, 2010). And yet staying quartered is a violation of civilian control and can have serious political implications for those in power.

Why would militaries flout orders from their civilian superiors? We adopt a military-centric view of insubordination that traces the armed forces' conduct to its own powerful instincts for self-protection and fulfillment. This contrasts with perspectives that treat military behavior as an adaptation to social class desires (O'Donnell, 1973), wider social contexts (Huntington, 1968), national-political cultures (Finer, 1988), or changing international environments (Desch, 1999). Our perspective operates on three interrelated levels: rational, ideational, and structural (Lichbach & Zuckerman, 1997; Taylor, 2003). As a rational actor, the military is goal oriented, weighing the costs and benefits of alternative courses of action to maximize its material well-being.¹ It wants ample defense-related resources and plots how best to achieve these, as well as how to respond to governments that have deprived it of material support (Thompson, 1973). Staying quartered can be a means of registering displeasure over resources denied to it. This perspective treats the military as a unitary actor capable of formulating preferences, goals, and strategies (Hunter, 1997) because it is a hierarchical organization whose leaders are able to establish and impose preferences for the entity as a whole.

The military is also an ideational actor, wanting to affirm its core identity: What kind of soldiers are we? What are our main roles? Who or what do we serve (Fitch, 1998; Taylor, 2003)? It evaluates its responsibilities and roles, defending missions that are deemed consistent with its core purpose and questioning those that are not. These evaluations orient the military and are based on a self-generated concept of what kind of professional fighting force it is, which in turn is shaped by doctrine, training, and customary practices (Taylor, 2003).

The structural force behind military behavior has two dimensions. The first is organizational. The military is concerned with preserving those structural features of the institution that are integral to its proper functioning. Foremost among these is its cohesion (Huntington, 1957). Although some internal cleavage is inescapable, militaries want to avoid the deeper divisions that could harm their fighting effectiveness and morale. Being pressed into service on missions that undermine military cohesion can motivate insubordination (Lee, 2005). The second structural dimension is legal. The laws governing the nation, the president (commander in chief), and the armed forces in particular define the parameters for permissible behavior, either affording the military a license to partake in public order operations or posing an obstacle to doing so. Hence, legal boundaries serve as opportunities or constraints for military conduct.

These concerns, it will be shown, are foremost in the minds of soldiers asked to repress civilian uprisings. To fully understand the reasons for military disobedience, we specify the rational, ideational, and structural underpinnings heretofore described, focusing on material interests, professional identity and its relation to responsibility and roles, institutional cohesion, and legal boundaries. For each, there is a discussion about why these factors would either inhibit or enhance a military's desire to follow orders to repress civilian uprisings.

Material Interests

Militaries zealously defend their material well-being (Abrahamson, 1972; Finer, 1988; Nordlinger, 1977). Losses in the defense share of the budget often mean deterioration in salaries and salary scales, retirement benefits, housing, training regimens, and arms procurement abilities. These, in turn, translate into declines in influence, prestige, and political power (Nordlinger, 1977). Losses may be absolute or relative in nature. A military is troubled either by real declines in salaries, hardware, and living conditions or by a loss of position vis-à-vis other organized interests. Staying quartered is a

strategic means of signaling to the authorities its disapproval of resource allocations. *With this in mind, we surmise that in countries where militaries have recently experienced declines in their material well-being, they may be demoralized or harbor feelings of resentment toward the civilian leadership. Under those conditions, they will be less motivated to assume the burdens of repression. Well-funded militaries, on the other hand, will be more inclined to follow orders.*

Professional Identity and Responsibility

As Huntington (1957) observed correctly decades ago, all military professionals have a responsibility to provide security for their client, namely society. But they do so by responding directly to society's political agent, the state, and more specifically to its officeholders. The normal expectation is that by complying with the government, the armed forces are also faithfully serving society, and should never have to choose between the two. However, some armies *are* conflicted when state authorities order them to march against nonviolent civilians. Under those circumstances, they believe they are entitled to discriminate between compliance with political directives on one hand and servicing society or the nation on the other hand. Convinced that leaders have lost touch with the public, harmed national interest, and lost a strong measure of credibility, some militaries will legitimate themselves as trusted public servants and custodians of the national interest by avoiding coercive confrontation with protesters. *Militaries that conclude their primary obligation is to defend the public and national interest will refuse repression orders and remain quartered. Militaries that conclude their primary obligation is to the government and regime will comply with repressive orders.*

Professional Identity and Roles

Militaries have views about which missions are appropriate or not. This judgment is based on the compatibility between the tasks to be fulfilled and the doctrine, training, and capabilities of the force and, importantly, customary practices in the past. Missions that are, in the military's mind, professionally degrading or otherwise incompatible with the military's *raison d'être* are ones they prefer not undertaking, and might resist if pressed into service. That will often be the case with internal public order operations where soldiers are asked to assist or substitute for police forces that have been overwhelmed by the sheer size and persistence of civilian demonstrations. Most

soldiers view police work as professionally debasing and resent doing it, whereas others, through repeated historical practice, have come to accept this service as customary, reservations notwithstanding. *Where militaries view such missions as appropriate, they will follow orders to repress. Where they view such missions as inappropriate, they will disobey orders to repress.*

Institutional Cohesion

Militaries prize internal cohesion. But where unity has been frayed, division can impede internal order operations of the kind under review here (Lee, 2009). Officers may square off against each other over ideological, political, material, or service-oriented differences. Factions predisposed to carry out presidential orders will think twice about doing so in the face of other factions resolved to resist such orders. They fear not only that their mission will fail but also that moving forward could trigger more serious conflict—even armed clashes—with fellow officers. Likewise, dissident factions wish to persuade the other side to come to an agreement not to use force for similar reasons. *Thus, where internal divisions are present, they will inhibit the successful execution of presidential orders to repress. Where divisions are either absent or well contained, armies will be able to fulfill such orders.*

Legalities

Legal authorizations or prohibitions of certain missions are related to the military's own appraisal of what constitutes legitimate orders. Laws that sanction military force to maintain internal order can reinforce perceptions of role appropriateness or create opportunities for military compliance, notwithstanding perceptions of inappropriateness. Officers can argue they had no choice but to comply since the president was within legal rights. Conversely, where laws prohibit such missions, the military is on a firmer ground to reject a presidential request. *Where internal order missions are legal, militaries will more easily fulfill orders to suppress civilian uprisings. If such operations are not legally authorized, then militaries are unlikely to follow such orders.*

Method

This is a medium-*N* qualitative study of military disobedience and obedience in the 21st century. We limited our study to this century to hold constant three new international realities: the coming of age of the Internet, sophisticated

telecommunications, and the historical diffusion and strengthening of human rights norms. Combined, these realities make the military potentially vulnerable to unprecedented global visibility, scrutiny, and liability—which could, in theory, affect decisions to repress in new ways.

Cases (10) are drawn from countries that have experienced massive civilian protests and presidential crises, where the survival of a head of state was at stake. A case materializes only once the military is called on to act in defense of the president besieged by such uprisings. A case terminates either when a president has been removed from office or a civilian uprising has been crushed. In all instances, presidents are met with sizeable popular uprisings that take the form of organized street demonstrations that peak at hundreds of thousands of civilians or more. Protesters are primarily nonviolent, with a few instances of violent resistance. These protests are mostly triggered by grievances over democratic irregularities and curtailments as well as economic difficulties. A government's options quickly dwindle to a few because of a lack of negotiating skills, conciliatory predilections, and a hardening of positions on either side. Protesters escalate their demands, moving from pleas for reform to calls for the removal of those holding executive office, or even for regime overthrow. Hence, what is under review in this article is a set of endgame scenarios where the authorities desperately try to cling to power by dispersing the crowds. Police either remain in the background or are called out but are overwhelmed as the demonstrations swell. Governments must then fall back on military forces to subdue the uprisings.

These endgame scenarios set the scope of conditions for case selection by establishing a reasonable context within which cases are chosen and in which theories could apply. Case selection occurred in two phases. First, positive cases were chosen according to this study's object of interest: military defiance of presidential orders. The reasoning was to clearly define a certain type of outcome and then search for a common set of explanations that might set these cases apart from others, following the logic of searching for "causes of effects" (Ragin, 1987). The countries are, chronologically, Serbia (2000), Argentina (2001), Georgia (2003), Ukraine (2004), Ecuador (2005), Tunisia (2010), and Egypt (2011).

The next phase of the research methodology identified negative cases. These fall within the scope conditions, where militaries chose to follow orders to repress, given the same background circumstances. Negative cases are relevant, meaning they resemble the positive cases in as many ways as possible, save their values on the dependent term (Ragin, 2000; Skocpol, 1984).² We then assessed whether or not these negative outcomes were associated with the presence of the same independent variables as those found for

the positive cases. Our hypotheses regarding military disobedience were strengthened to the extent that the causal agents present for the positive cases were absent in the negative ones. The negative cases are Bolivia (2003), Iran (2009), and Bahrain (2011). Combined, these positive and negative outcomes constitute the full population of 21st-century endgame cases heretofore described. For an explanation of related but substantially dissimilar cases left out, see Appendix A.

Although the causal factors to be assessed are those previously described, it could still be argued that we have omitted other plausible explanations for military disobedience or obedience among the population of cases we have identified. Some rival causal factors that are well-known among civil–military scholars are briefly considered, as follows.

Regime type. Since authoritarian regimes are less accountable to the public, they should be able to more easily resort to coercion against civilian protesters than democratic regimes. Moreover, autocrats often have neither planned modes of succession nor any graceful exit strategy. With the uncertainties of regime turnover being greater for autocrats, their grip on power should be that much more tenacious. Finding that there is no difference between authoritarian and democratic leader's ability to control the military or to hold on to power in these situation would solidify the argument that regime differences were not relevant to an explanation of military disobedience.

Democratic history and culture. Certain regions, such as the Middle East and North Africa, Eastern Europe, and the former Soviet Republics, have had very limited if any democratic experiences compared to Latin America. A political culture of pluralism, competition, and tolerance for opposition or dissent of any kind would be predictably underdeveloped there. That, in turn, should make military repression an easier option. To the degree that it is not, then regional differences of this sort can be more easily explained away.

Type of force: Conscript or not. Theoretically, a conscript force will be less likely to mobilize against its own people. The argument here is that those enlisted servicemen in a conscript army are drawn from the masses and are usually within the same class and age range as the protesters themselves. Hence, they can more easily identify with their cause than can self-selected volunteers and would be more reluctant to use force against them.

External influences. One state could influence events in neighboring states. However, a distinction must be made between the demonstration effects of protests on one hand and the influence of one military on another. We question whether a military that has refused orders to repress in Country A could have set an example for a military in Country B. We also examine whether foreign states could have influenced military decisions by various means.

Finally, this study carefully limits its attention to the clash between protesters and authorities, the military's deliberation at this moment, and the circumstances leading up to these events. Although we consider the short-term fate of presidents following military defiance, we *do not* analyze longer-term repercussions. What became of the Georgian or Ukrainian revolutions in the decade following those turning points and whether or not Egypt's and Tunisia's regimes evolve toward democratic rule in the future are issues that lie beyond the scope of this study.

Information Retrieval and Data Presentation

To be sure that the identified endgame scenarios were in fact the same across all cases, comparable data had to be retrieved. For this we developed an instrument that asked the same set of empirical questions across positive and negative cases (George & Bennett, 2005). The results are displayed in Table 1. The empirics of each case were built by retrieving information on the origins, nature, size, and demands of protests, presidential orders to repress, the military's response, the effectiveness of police, and, last, the president's fate. Information was gathered from primary sources such as newspaper accounts, documentary films, and legal documents (constitutions, decrees, other statutes), along with secondary sources (scholarly literature, with a particular focus on country specialists). We then sought evidence linking our explanatory variables with military behavior (either disobedience or not).³ The variables are nominal and dichotomous (i.e., good or poor material conditions). The coding procedures for measuring the values on these variables are described in Appendix B, along with measures for the alternative explanations. For purposes of clear presentation, these variables were scored as *yes*, *no*, and *partial*, as shown in Table 2.

Empirical Findings

Material Interests

For most of the positive cases, material conditions (budgets, salaries, housing, equipment, and training) were poor or had deteriorated over time (see Table 2). Direct and indirect evidence was sought that reflected military material dissatisfaction to know whether in fact a decline could have served as a motive. What we found was dissatisfaction with substantial downsizing of military units and facilities without adequate structural adjustments to compensate for the losses (Argentina, Ukraine; D'Anieri,

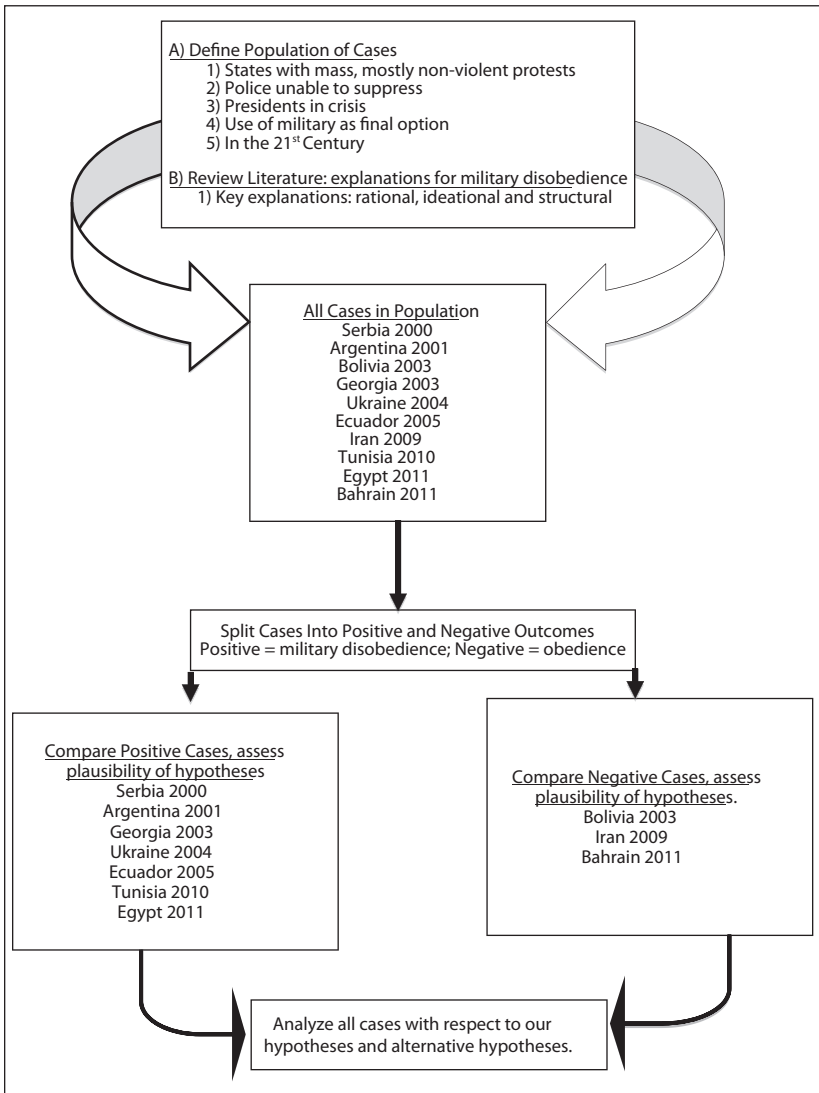


Figure 1. Case selection and analysis.

Kravchuk, & Kuzio, 1999); soldiers reluctantly taking on secondary employment to supplement inadequate salaries (Georgia, Argentina); persistent complaints about food, clothing, living conditions and the state of disrepair

Table 1. Constructing the Population of Positive and Negative Cases: Relevant Conditions.

	Positive cases						Negative cases			
	Serbia Election Fraud	Georgia Election Fraud	Ukraine Election Fraud	Egypt Dem Restrictions; Econ. Problems	Tunisia Econ. Problems	Argentina Econ. Problems	Ecuador Court- rigging	Iran Election Fraud	Bahrain Dem. Restrictions	Bolivia Econ. Problems
Causes of Protests?	Election Fraud	Election Fraud	Election Fraud	Dem Restrictions; Econ. Problems	Econ. Problems	Econ. Problems	Court- rigging	Election Fraud	Dem. Restrictions	Econ. Problems
Nature of Protests?	Non- Violent	Non- Violent	Non- Violent	Mostly Non- violent	Mostly Non- violent	Non-Violent and violent	Non-Violent	Non- Violent	Mostly Non- violent	Non- Violent
Size of Protests: Peak at 100,000+?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Protest demand: president's ouster?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Order to Repress?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Order Followed?	No	No	No	No	No	No	No	Yes	Yes	Yes
Military Stays quartered?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No
Police ineffective or not used?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
President removed?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes

Questions

Table 2. Causes of Military Disobedience of Orders to Repress.

Case	MD	RP	MDI	MI	ID	Outcome
Serbia	Yes	Yes	Yes	Yes	Yes	Disobey
Georgia	Yes	Yes	Yes	No	Yes	Disobey
Ukraine	Yes	Yes	Yes	Yes	Yes	Disobey
Egypt	Partial	Yes	Yes	No	No	Disobey
Tunisia	Yes	Yes	Yes	Yes	No	Disobey
Argentina	Yes	No	Yes	Yes	No	Disobey
Ecuador	Partial	Yes	Yes	No	No	Disobey
Iran	No	No	No	No	No	Obe
Bahrain	No	No	No	No	No	Obe
Bolivia	No	No	No	No	No	Obe

ID = institution divisions deter mission; MD = military dissatisfaction with material conditions; MDI = mission deemed inappropriate; MI = mission is illegal; RP = military responsibility to people not regime.

of equipment, and lack of funds for territorial defense (Ukraine, Argentina, Georgia, Ecuador); and critical comparisons with material conditions of the past or with rival security forces (Serbia).

For example, in Argentina, declines in material conditions had been going on for some 17 years, and there had been substantial expressions of frustration with the lack of revenue (British Broadcasting Corporation, 2000). Serbian soldiers compared their plight to better times prior to the NATO bombings and took umbrage over hefty increases in salaries for police (Binnendijk & Marovic, 2006). In nations where presidents practiced divide-and-rule tactics, a contributing factor for disobedience was the fact that many soldiers were left out of patronage and corruption networks that benefited loyalists (Georgia, Egypt, and Tunisia). In Egypt, many officers have benefited from military ownership in a wide range of industries (Gotowicki, 1997). At the same time, officers resented more recent efforts by Mubarak’s son, Gamal, to build patronage networks where midlevel officers were increasingly replaced by businessmen (Cordesman, 2011). So Egypt constitutes a case of partial material dissatisfaction. So too does Ecuador, where the military’s share of the national budget had declined from 10.9% to 7.3% between 1995 and 2006 and complaints about insufficient funds for border defense were common. (Jaskoski, 2012) And yet the military also enjoyed a cushion from budgetary swings because of its large ownership in enterprises nationwide (Mani, 2011).

By contrast, in all three negative cases, material conditions were good and had improved. In no case did we find expressions of dissatisfaction. The material resources available to the Bahraini military are substantial and have been for some time. Military expenditures as a percentage of GDP placed Bahrain 20th in the world as of 2006 (CIA World Fact Book, Bahrain, 2011), and the country receives the latest in training and weapons with help from the United States and the Gulf Cooperation Council (U.S. Department of State, 2011). In Iran, the Iranian Republican Guard (IRG) controls a huge military-industrial complex, with ties to more than 100 companies that bring in an estimated annual revenue of more than US\$12 billion (“Iran’s Revolutionary Guards: Showing Who’s Boss,” 2009). Bolivia enjoyed a steady 17% increase in MILEX (Military Expenditures) between 2000 and 2003, after lean years experienced under International Monetary Fund–imposed austerity programs (Stockholm International Peace Research Institute, 2004).

Professional Identity and Responsibility

As the findings in Table 2 indicate, there is a sizeable difference between positive (disobedience) and negative (obedient) cases. When asked to repress unarmed civilians, disobedient militaries often profess a duty to the people or nation rather than the regime.⁴ In the places where militaries refused orders, they frequently identified with popular sentiments. According to the Egyptian constitution, Article 180, the military “owe their allegiance to the people.” The Egyptian high command took that commitment seriously, stating, “To the great people of Egypt, your armed forces, acknowledging the legitimate rights of the people . . . have not and will not use force against the Egyptian people” (Doucet, 2011). In Tunisia, like in Egypt, there was a stronger association with the nation than with the regime. Although it is not uncommon for militaries to make this distinction, the Tunisian and Egyptian militaries specifically viewed the prospect of killing protesters as contrary to their role as defenders of national—not regime—interests (Greenblatt, 2011).

In Ukraine, the army and national intelligence forces made public statements that they were on side of people and would not take part in a violent crackdown (Wilson, 2005). Some approached police officers who were on the street awaiting orders to suppress the demonstrators and said, “Don’t forget you are called to serve the people” (York, 2007). In Georgia, the military was troubled by the president’s failure to meet the basic needs of average Georgians and could no longer support him (Darchiashvili, 2005). In countries where the military remained garrisoned and never took to the

street, there were no recorded direct public appeals to the protesters. But we do know that in Ecuador there has been a long tradition of the military sympathizing with popular causes and indigenous groups (“Ecuador’s Mahuad Ousted Amid Massive Protests,” 2000).

In negative cases, militaries fulfilled their responsibilities to the governments. The Iranian military complied with the government’s professed embodiment of the revolution. Since this revolution had been won on behalf of “the people,” then submission to state powers logically constituted for them a fulfillment of public will. Soldiers and officers were indoctrinated to support regime institutions to fulfill revolutionary goals. The IRG’s very existence dates to the founding of the 1979 revolution. The IRG’s purpose has since been to protect the Islamic system and regime set up by Khomeini via the enforcement of Islamic codes (Iran Briefing, 2011). IRG officers were taught that defying the supreme leader was tantamount to defying the will of God.

In Bolivia, the military did not have revolutionary attachments to the regime. Instead, soldiers recognized their unique constitutional obligation to “guarantee the stability of the legally constituted government” and that refusal to do so was grounds for a dishonorable discharge (Bolivia Constitution, 1994). In Bahrain, military allegiance to King Al Khalifa and family was largely driven by a shared Sunni identity and a desire to protect the regime from a marginalized yet majority Shi’a population (Barany, 2011). The Bahraini military forces are not only overwhelmingly Sunni but also voluntary—unique in a region dominated by conscripted military forces. All accounts suggest the reason for the volunteer force is to prevent Shi’a dominance of the military (Barany, 2011).

Professional Identity and Missions

There is also a clear difference between the positive and negative cases regarding missions. The disobedient militaries unequivocally rejected the role as enforcers of internal public order. This, we found, was largely based on preconceived notions about core professional purpose, itself shaped by past practices. In Serbia, the military had fought external wars against Bosnia and Croatia and associated professionalism, with those missions not internal security, (Cohen, 2000). In the Ukraine, the military also understood their role was to secure the borders and expressly *not* to be used to restrict the rights and freedoms of citizens, including the freedom to assemble. The Ukrainian military saw itself as a very professional force, having inherited the structure, tradition, and troops of the former Soviet army (Sanders, 2008).

Under President Mubarak, domestic security shifted early on from the Egyptian military to the police and the Central Security Force. The military saw themselves as professionals and as such were not to be involved in domestic repression (Ghorbal, 2011). The Argentine military was damaged by its involvement in the 1976–1983 internal Dirty Wars and thus fully embraced the legal curbs on its domestic role (Fitch, 1998; Pion-Berlin, 1997). Ecuador has had a long history of military involvement in internal development, and since the late 1990s the army has fought crime and drug trafficking. But officers did not consider repression of unarmed citizens to be part of their mandate.

Gathered evidence suggests that for the negative cases, there was much greater acceptance of an internal order role. Ali Jafari, who took over command of the IRG, said, “The main mission of the IRG is to deal with the internal enemies” (Smyth, 2009). The organic law (Article 8) that defines the nature and role of the Bolivian armed forces allows the president to call on the military to restore public order. The military has taken up that task countless times without objection. Thus, the repressive mission—particularly in defense of neoliberal economic policies—had become customary (Mayorga & Morón, 2004). This was also true in Bahrain, dating back to the mid-1990s, when popular uprisings against the Al Khalifa regime prompted the intervention of security forces on numerous occasions. The Bahrain Defence Force was actively involved in repression, including the killing of protestors (Waldman, 1995). Nothing in the 2011 mission was inconsistent with previous practices.

Legal Mandates

If a constitution refers to the military’s role as the guardian of internal security or public order, then this has historically constituted sufficient justification for presidents to order the army to crack down on dissidents. In addition, a constitutional state of emergency, once declared and approved during the time of unrest, can also authorize executive officers to mobilize the military if in fact it is explicitly referred to as a legal option.

In four of the seven positive cases, there was no legal basis for repression. In Serbia and the Ukraine, presidents chose *not* to invoke states of emergency or any laws for that matter even as they ordered troops to quell the uprisings. The Tunisian constitution (Article 46) allows the president to take exceptional measures when a threat to the republic arises, but the president *cannot* call on the armed forces. The armed forces of Argentina are bound by a national defense law that prohibits them from internal security missions

(Argentina, 1988). By contrast, Georgia, Egypt, and Ecuador all have statutes that legalize the president's use of the military per se during states of emergency. These declarations were to be invoked during exceptional circumstances, when a significant threat was posed to the constitutional, political, or economic order. Presidents who faced massive, sustained, and disruptive civilian uprisings had some legal grounding for their decisions to order military repression.

Among all the negative cases, there were ample legal foundations for using the military in an internal order mission. According to numerous statutes, the role of the Bahrain military's mandate is to protect the regime from external *and* internal threats. Article 33 of the Constitution of Bahrain grants the king the power to assign the military "national tasks within the homeland and outside it" (Constitution of Bahrain, 2002). And a declaration of martial law gave the military wide-ranging powers to curb the uprisings (Cockburn, 2011). Article 150 of Iran's constitution says the Islamic Republican Guard must be maintained to continue its role of guarding the revolution and its achievements (Islamic Republic of Iran Constitution, 1989), again implicating the military in the revolutionary regime's defense. And Bolivia's organic law of the armed forces (Article 8) allows the president to call on the military to restore public order.

Institutional Unity

We found strong evidence that divisions within the services in the Ukraine, Serbia, and Georgia inhibited the military from cracking down on protesters. In the Ukraine, divisions naturally evolved between troops under interior ministry direction and other army units aligned with intelligence and secret service forces that refused to cooperate. In Georgia and Serbia, presidents created divisions via classic divide-and-rule strategies. These presidents rewarded loyalists with promotions and patronage while excluding those who failed to demonstrate sufficient allegiance. Although this had the intended effect of deterring coup plotting, it had the unintended effect of reducing the president's ability to suppress massive uprisings. Some units started out prepared to defend the government, only to retreat in the face of stiff resistance from nonloyalists and growing civilian protests. These units quickly realized that the pursuit of protesters could trigger intra-security-force clashes, an outcome they sought to avoid at all costs. This was true in the Ukraine and Georgia.

In Serbia, disunity was a factor, with about 100 active and former soldiers from the army's elite 63rd parachute brigade allowing protesters to take over

the federal assembly building and the state-run television station RTS (Sanford, 2000). Loyalists stood back and watched. In Egypt, there were minor defections, but generally the high command kept a firm lid on dissent (Jansen, 2011). Likewise, there is no evidence that unity was an issue for Tunisia, Argentina, or Ecuador.

The negative cases provide a contrast. The bulk of military and security units remained unified throughout the civilian unrest. Though there were divisions, these were much less serious as dissident units or officers were not only vastly outnumbered by loyalists but also suppressed by governments that decisively gained the upper hand. Save for rare instances, there were no occasions when military personnel openly opposed using force against protesters in Bahrain, nor any evidence of significant divisions within the Bahrain military before or during the uprisings. Dissent was quickly muffled in Bolivia, where at least one frontline soldier was shot for refusing orders. In Iran, there was complete unity within the IRG and its paramilitary force the Basij—the two forces responsible for maintaining domestic order. In sum, internal divisions were either well contained or not present in all of the negative cases.

Causal Summations and Interpretations: Explaining Positive Versus Negative Cases

As Table 2 indicates, there are substantial differences in the set of positive (military disobedience) and negative cases (obedience). Disobedience arose from material grievances, military affiliation with public or national interests, rejection of internal public order roles, illegalities, and splits within the services. Conversely, we did not find any instances of military obedience where any of those positive case conditions—in whole or part—were present. To the contrary, obedience occurred only where material interests were satisfied and where militaries identified with government, believed internal order missions to be appropriate, followed the law, and remained unified. Hence, with causal agents amply present for the positive cases but always absent from the negative ones, our five hypotheses are strengthened.⁵

The most prevalent causal factor among the seven positive cases was mission inappropriateness. For all of these disobedient militaries, the dissonance between the ordered mission and their own sense of acceptable, customary professional conduct was too great to ignore. Armies either had fought external wars (Serbia, Egypt, Ecuador, Argentina), had inherited external defense orientations and force structures from communist regimes (Ukraine, Georgia), or had negative experiences with internal order missions

(Argentina). All of these experiences no doubt reinforced their association of professionalism with defense and weighed in favor of rejecting the internal public order mission and hence rebuffing orders to repress.

When faced with the daunting possibility of having to use force against unarmed citizens, disobedient armies could not square fulfillment of presidential orders with their perceived social responsibility to defend “the people” or the nation. This was true in six of the seven positive cases. Ironically, it is the military’s belief that it is free to choose between these obligations—one to state and the other to society—that is often the grounds for deep concern (Serra, 2010). Too often militaries have used their popular allegiance or defense of national interests as a pretext to topple elected governments they do not like. This is why constitutions so often refer to militaries as “nondeliberative” bodies. And yet in these instances of disobedience, military deliberation was not used to grab power and had its value, undoubtedly saving lives.

It is interesting that in every instance where militaries associate their paramount responsibility with fulfilling the public or national interest, they also deem the internal public order mission inappropriate, and thus refuse to repress. This seems logical since an acceptance of that mission’s legitimacy would have made it more imperative that soldiers follow through by forcefully dispersing the uprisings. That, in turn, would have broken with popular aspirations.

Assessments about material conditions also strongly correlated with disobedience. In five of the seven positive cases, militaries registered dissatisfaction with their budgets, and in two others there was partial dissatisfaction. Paying for loyalty is a time-honored strategy among leaders wishing to remain in the good graces of their armed forces—even more so when their backs are to the wall. Most of these presidents failed to do so and paid the price, leaving their militaries undernourished, discontented, and uncooperative. Registering displeasure with resource depletion via quartering could also have been a strategic move on the part of the military to compel the current or future government to replenish the military’s budget. Also, in all cases there was dissatisfaction with defense budget allotments *and* a belief that internal order operations did not constitute a legitimate use of military force. Militaries that have questions about mission suitability would be even more reticent to comply with a government that has deprived it of much-needed resources. In short, professional identity and rational self-interest may have motivated disobedience in a mutually reinforcing manner.

Preservation of institutional unity has always been the centerpiece of military interests. In three of the cases under review, preexisting divisions inhibited

loyalists from fulfilling presidential orders. In Serbia, Georgia, and the Ukraine, units that were initially prepared to carry out presidential orders to repress eventually stood down when faced with the prospect of clashing with dissident units. Soldiers will align with one faction or another in pursuit of material gains, promotions, assignments, and other self-serving ambitions. But despite these differences, they still profess allegiance to a single military institution. In that respect, soldiers can be factionalized *and* protective of their organization. Thus, when presidential orders to repress pit one armed unit against another, threatening to literally tear the military apart, soldiers drew the line.

We had hypothesized that there would be substantial congruence between professional role identity and legality. Armies were most likely to resist missions that were both illegitimate and illegal. This was true for four of the positive cases (Serbia, Ukraine, Tunisia, and Argentina) where either there was no legal justification or the law was not invoked at the time. Armies that view domestic order missions as inappropriate and can find no legal basis for them will be more confident in their decisions to defy presidential orders. In the other three cases (Georgia, Egypt, and Ecuador), there was a legal basis for repression. Yet each of those armies chose to defy their commanders in chief nonetheless, even when legal authorizations were embedded within constitutions. In no case does a legal authorization deter a military from disobeying orders. This suggests one of two things: Either these militaries were so powerfully motivated by professional identity that they were willing to risk a violation of the law and possible sanctions, or they had gambled on the president losing his battle with the protesters, and thus believed future reprisals were unlikely since a successor government would undoubtedly show gratitude for the military's restraint. Further research is warranted here.

As far as the negative cases are concerned, patterns were strikingly different. Iranian, Bahraini, and Bolivian armies did not express budgetary gripes. The obedient militaries never objected to the missions at hand, squared their defense of the regime with their social responsibility, and either suffered no internal divisions or managed to squash any internal dissent effectively enough. Although some of these militaries had some identity with the public, they were convinced that servicing the regime in power was their primary obligation.

Alternative Explanations

We examined other plausible explanations for military disobedience and obedience. The findings are summarized in Table 3. It is clear that none of these variables can discriminate between the positive and negative cases. The study rejects regime type as an explanation for military behavior. As

Table 3. Alternative Causes of Military Disobedience.

Case	Regime type	Democratic culture?	Conscript force?	Foreign influences?	Outcome: Military disobedience?
Serbia	Competitive authoritarian	No	Yes	Yes	Yes
Georgia	Competitive authoritarian	No	Yes	No	Yes
Ukraine	Competitive authoritarian	No	Yes/no	No	Yes
Egypt	Civilian authoritarian	No	Yes	Yes	Yes
Tunisia	Civilian authoritarian	No	Yes	No	Yes
Argentina	Democracy	Yes	No	No	Yes
Ecuador	Democracy	Yes	Yes/no	No	Yes
Iran	Theocratic authoritarian	No	Yes	No	No
Bahrain	Personalist authoritarian	No	No	Yes	No
Bolivia	Democracy	Yes	Yes	No	No

evinced by the mix of regimes among the positive cases, autocratic leaders from authoritarian or competitive authoritarian regimes could no more effectively demand compliance from their armed forces than could democratic leaders. In addition, autocrats could not hold onto power appreciably longer than democratic rulers. In Table 4, we consider the endurance of presidents from the moment civilian protests manifest themselves until the moment they are thrown out of office. The differences between authoritarian, competitive authoritarian and democratic regimes are a question of days, not weeks or months. Political historical cultures could not discern between positive and negative cases either. There is a historical absence of democratic culture in five of the seven cases of disobedience, and yet these armies practiced perfect restraint nonetheless. Conversely, in Bolivia, a negative case, the presence of a democratic culture did not deter the military from cracking down on unarmed civilian protesters.

A conscripted army does not appear to be a deterrent to repression, nor does a volunteer force induce repression. An examination of the negative cases (Table 3) reveals that two of the three armies had conscript components and yet all violently repressed the protesters. Conversely, in Ecuador and Argentina there were volunteer forces that refused to repress.

Table 4. Presidential Endurance, Civilian Protests, and Regime Type.

Country	Protests begin	President falls	Presidential duration during crisis (days)	Regime type	Average presidential duration by regime (days)
Ecuador	April 13, 2005	April 20, 2005	8	Democratic	8
Argentina	December 13, 2001	December 21, 2001	8	Democratic	
Tunisia	December 17, 2010	January 14, 2011	28	Authoritarian	23
Egypt	January 25, 2011	February 11, 2011	18	Authoritarian	
Serbia	September 26, 2000	October 7, 2000	11	Competitive authoritarian	
Georgia	November 3, 2003	November 23, 2003	20	Competitive authoritarian	23
Ukraine	November 21, 2004	December 28, 2004	37	Competitive authoritarian	

Finally and undoubtedly, the explosive events in Tunisia in November and December 2010 exerted influence over the uprisings in Egypt at the start of 2011. The protests in Georgia in the fall of 2003 no doubt had an impact on similar protests in the Ukraine the following year (Stolberg, 2011). But we could not find evidence to either confirm or reject the hypothesis that *military* decisions to defy presidential orders in one state had a transferable influence on like-minded decisions in neighboring states. However, other kinds of external influences most likely factored in for Egypt, Serbia, and Bahrain. Egypt's military received US\$1.3 billion in annual assistance from the United States and would not want to have burned bridges with Washington by intervening against protesters. In Serbia, the military was aware of NATO's potential involvement if attacks against civilians ensued. And Saudi troops entered into Bahrain in March 2011 to assist the government in its crackdown on protesters. Too much should not be made of these foreign influences since in our view domestic factors played a much more significant role. However, it is evident that in these three cases (two positive, one negative) militaries did not operate with total independence.

Conclusion

Militaries caught between a president desperate to cling onto power and a public eager to see his removal face a Hobbesian choice: disobey orders and thus violate principles of civilian control or obey them and risk reputational damage by violating the public's trust, not to mention its human rights. With

suboptimal alternatives before them, the armed forces choose a defensive posture: to protect their own institution. Whether they obeyed or disobeyed orders, all of the militaries under review here appear to have been motivated by concerns springing from their own institutions: material well-being, professional identity, and organizational cohesion. Which of the two courses of action they chose (disobey or obey) in defense of their institution differed, depending on their past, their own institutional profiles, and how they evaluated their situations.

With so many countries from so many regions under review, we would have naturally expected not only different responses to the same endgame scenarios but varied—perhaps even unique—explanations as well, shaped by the peculiarities of each context. What is striking is the degree of “within-set” uniformity we discovered. There is a substantial convergence around the same values on the five military-centric variables, enough to clearly delineate the disobedient militaries from the obedient ones. When faced with the same set of circumstances, armies react in fairly predictable ways. They do so because they share common, core institutional interests. They all covet resources and react defensively to their loss, they all have professional identities that define for them what legitimate soldiering should and should not be about, and they all value internal cohesion. At bottom, they all want to know that the missions they are sent on will, at the very least, not do irreparable harm to their institution.

In neither the cases of shirking or those of compliance were there occasions when the armed forces seized power unilaterally. This in itself is an interesting finding that contrasts with a multitude of studies before this one that demonstrate how armies aggressively pursue their corporate well-being by resorting to political intervention, including the coup d'état (Nordlinger, 1977). Although some of the defiant militaries assumed caretaker roles (Egypt), most preferred to stay in the barracks. This pattern of behavior does not suggest the armed forces have acted apolitically. In allowing civilian uprisings to unfold and ultimately to bring down sitting presidents and regimes, the military were, wittingly or unwittingly, making political choices and facilitating political solutions of one kind or another, as were the armies that remained loyal to their governments. But the analysis provided here does not reveal a military coercively foisting its own ideological or political agenda on others so much as one defensively guarding its institutional well-being by staying quartered.

Although there are a few cases of military quartering in the 20th century (i.e., Philippines, 1986) this is a relatively new pattern in civil–military relations that has very much become a 21st-century phenomenon. Why would

that be so? This is the age of the Internet and modern telecommunication, making the world interconnected in ways it was not in previous decades and centuries. What takes place in a given country is globally disseminated with the click of a cell phone button. Repressive leaders who in previous eras could cloak their misdeeds by muzzling the local press no longer have that advantage; their actions, and those of their armies, are instantly exposed for the world to see. Moreover, human rights standards have earned tremendous currency this century. Once exposed, repressive deeds are placed under greater scrutiny by the international community, potentially raising the costs to those who would violate human rights. Unquestionably, the strength of civilian judicial systems varies greatly across the cases we have analyzed. Nonetheless, the international community has tools at its disposal to punish culpable countries via diplomatic isolation, trade embargoes, sanctions, or moral condemnations. Inevitably, those measures will negatively affect the armed services. Consequently, the 21st-century military has incentives to sheathe its sword, to deflect attention from itself and ward off domestic, regional, and international opprobrium.

Although many more militaries have remained in the garrison in recent years than in the past, it is difficult to accurately predict any future trends. As the explosive events in the Middle East indicate, calculations can change with shifting balances of forces, renewed determination of demonstrators or leaders, escalations of violence, and other unforeseen circumstances. Ultimately, however, militaries that are protective of their institution's vital material interests, identity, and organization will decide for themselves whether to come to the rescue of besieged presidents.

Appendix A

Cases That Do Not Fit Scope Conditions

The following 21st-century cases do not fit within the population parameters as we have defined them, for the following reasons:

Venezuela (2002). Not a positive or negative case. What began as a non-violent civilian opposition to President Chávez was quickly joined by the military, which then launched an unsuccessful coup.

Azerbaijan (2005). Is not a negative case because the protests were small and were successfully suppressed by the police, the presidency was not in crisis, and the military was never used.

Thailand (2006–2010). The situation in Thailand is a classic coup d'état. We are looking at cases where the executive was challenged by protestors and

the military either supported or withdrew support, but we do not look at cases in which militaries coup.

Malaysia (2007). Not a negative case. Although the protest was massive and the prime minister did enter into a crisis situation, the police were effective at controlling the demonstration and dispersing the crowd. Military use was never considered as a final option.

Libya (2011). An example of an armed—not principally nonviolent—civilian opposition to the president.

Syria (2011–2012). A developing case, but one characterized increasingly as a civil war, with a dissident military now fighting along side civilian opponents to the regime. This violates the case rule that the military remains on the sidelines should it defy presidential orders.

Yemen (2011–2012). Yemen is still evolving as of this writing but is one where the opposition had become increasingly violent, and it fits neither a positive nor a negative case scenario.

Appendix B

Coding of Causal Explanations and Alternatives

1. *Military dissatisfaction*. If primary and secondary documents indicated recent evidence of poor material conditions and military statements about poor material conditions, then we coded the military dissatisfaction (MD) condition as *yes*. If no evidence was found, then we coded the MD condition as *no*.
2. *Military responsibility to people*. If primary and secondary documents indicated evidence of past military allegiance to the people and/or military statements affirmed allegiance to the people, then we coded the military responsibility to people (RP) condition as *yes*. If evidence was found that the military allegiance was with the regime, then we coded the RP condition as *no*.
3. *Mission deemed inappropriate*. If primary and secondary documents indicated that the military was historically not used for maintenance of internal order, and/or the military made statements that challenged the appropriateness of internal use, then we coded mission deemed inappropriate (MDI) condition as *yes*. If the military had been a historic force of repression and/or the military did not question this role, then we coded the MDI condition as *no*.

4. *Mission deemed illegal.* If primary and secondary documents indicated that the military was prohibited by law from operating internally, then we coded the mission is illegal (MI) condition as *yes*. If internal military missions were allowed by the law, we coded the MI condition as *no*.
5. *Institutional divisions deter mission.* If primary and secondary documents indicated that the military had historically been fragmented and/or military leaders cited institutional unity as a concern, then we coded the institutional divisions deter mission (ID) condition as *yes*. If the military had been united and the military had no concern with disunity, then we coded the ID condition as *no*.

Alternative Causal Factors

1. *Regime type.* These assessments were made by referencing two sources. The first was Freedom House (FH), *Freedom in the World*, Annual Reports 1999–2012, which ranked all the countries in our study by how much civil liberties and political rights they had at the time. FH scores provide cutoff points among free, partly free, and not free systems, which closely paralleled our distinctions among authoritarian, competitive authoritarian, and democratic. The second was a book by Levitsky and Way (2010), the most extensive study on competitive authoritarian (CA) regimes, with rankings that confirm our choice of Serbia, Georgia, and Ukraine as CA regimes, and the others as not.
2. *Democratic vs. nondemocratic cultures.* These were assessed by reviewing the U.S. Department of State *Background Notes 2012* on each of the countries and were supplemented by FH *Country Reports* as well as secondary sources.
3. *Force type.* For force type (conscript or not), we referred to the International Institute for Strategic Studies (2000–2011), where specific mention of the types of military forces was made.
4. *Foreign influences.* Foreign influences were determined by consulting mostly newspaper articles and some secondary sources.

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Notes

1. Principal-agent (P-A) theory also treats the military as a rational actor, which despite its subordinate status in the hierarchy will sometimes shirk its obligations (Feaver, 2003). P-A theory was devised with advanced democratic states (i.e., the United States) in mind, where the military regards the democratic government as inherently legitimate, an assumption that does not always hold in democratizing states of the third world or in nondemocratic states. Thus, although still relevant, the P-A model has more limited application to those settings.
2. These are cases where disobedience is theoretically possible given the similarity of background conditions.
3. Because of the limitations of space, we are not able to report all of the evidence within the narratives that follow. But evidence was gathered on each and every case.
4. Our assessment of public versus government affiliation is independent of the outcomes themselves and based on military statements and/or past practices to determine their responsibility, and not the fact that they disobeyed orders.
5. Although we have considered some interactions between paired variables, our evidence does not permit us to discern whether all five of these variables must operate in conjunction with each other to produce the set of outcomes and, if so, just what those complex interactions would look like. It was also beyond the limits of this study to determine whether those variables operate sequentially in a causal chain. Only detailed process tracing for each case could establish that finding—a worthwhile undertaking for future research.

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