Unarmed and Unafraid:
Accounting for Demilitarization in International Relations

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TABLE OF CONTENTS

Abstract

Costa Rica and Panama have both abolished their militaries. Costa Rica dismantled its military in 1948 while Panama demilitarized in 1990. The choice of these states to demilitarize is puzzling. Many IR theories stress the need of states to maximize their chances of survival in an anarchic international system. Demilitarization does not appear to align with these theoretical expectations, since it makes a state less capable of deterring hostile powers and resisting in the case of a foreign attack. The cases of Costa Rica and Panama are particularly unusual. Of the non-military states that currently exist, Costa Rica and Panama are outliers in terms of their capacity to support a substantial military force. To solve the puzzle of why these states demilitarized, this thesis uses analytical eclecticism and a levels-of-analysis approach. This thesis presents several theories at the structural, domestic, and individual levels which could potentially explain why Costa Rica and Panama abolished their militaries. These theories are then tested against the facts of the two cases to determine whether they can explain demilitarization. The core finding is that both domestic and structural factors played a critical role in Costa Rica and Panama's demilitarization. The ruling regimes of Costa Rica and Panama needed to abolish the armed forces to secure their power and had an opportunity to remove the military while it was too weak to retaliate. Meanwhile, their close ties with the hegemonic power in the region, the United States, greatly reduced the risks of demilitarization, and a defense agreement (the Rio Pact) enhanced Costa Rica's security. To account for the non-military status of Costa Rica and Panama, it is therefore necessary to consider both structural and domestic-level factors.

Résumé

Le Costa Rica et le Panama ont aboli leur armée. Le Costa Rica a démantelé son armée en 1948 tandis que le Panama l'a fait en 1990. Le choix de ces États de se démilitariser laisse perplexe. De nombreuses théories des relations internationales soulignent la nécessité pour les États de maximiser leurs chances de survie dans un système international anarchique. La démilitarisation ne semble pas correspondre à ces attentes théoriques, puisqu'elle rend un État moins capable de dissuader les puissances hostiles et de résister en cas d'attaque étrangère. Les cas du Costa Rica et du Panama sont particulièrement inhabituels. Parmi les États non militaires qui existent actuellement, le Costa Rica et le Panama sont des exceptions en termes de capacité à soutenir une force militaire substantielle. Pour résoudre l'énigme des raisons de la démilitarisation de ces

États, cette thèse utilise l'éclectisme analytique et une approche par niveaux d'analyse. Cette thèse présente plusieurs théories aux niveaux structurel, domestique et individuel qui pourraient potentiellement expliquer pourquoi le Costa Rica et le Panama ont aboli leurs armées. Ces théories sont ensuite testées par rapport aux faits des deux cas afin de déterminer si elles peuvent expliquer la démilitarisation. La principale conclusion est que les facteurs nationaux et structurels ont joué un rôle essentiel dans la démilitarisation du Costa Rica et du Panama. Les régimes au pouvoir au Costa Rica et au Panama avaient besoin d'abolir les forces armées pour maintenir leur pouvoir et ont eu l'occasion d'éliminer les militaires alors qu'ils étaient trop faibles pour riposter. Dans le même temps, leurs relations solides avec la puissance hégémonique de la région, les États-Unis, ont considérablement réduit les risques de démilitarisation, et un accord de défense (le Pacte de Rio) a renforcé la sécurité du Costa Rica. Pour expliquer le statut non militaire du Costa Rica et du Panama, il est donc nécessaire de prendre en compte des facteurs structurels et domestiques.

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List of Figures

Introduction

Costa Rica and Panama have both chosen to abolish their militaries. Costa Rica dismantled its military in 1948 while Panama demilitarized more recently in 1990. The choice of these states to demilitarize is puzzling. Many IR theories stress the need of states to maximize their chances of survival in an anarchic international system.[1] The decision of states to abolish their own military does not appear to align with these theoretical expectations, since demilitarization makes a state less capable of resisting in the case of a foreign attack or invasion, and of deterring such challenges to its security. Non-military states do not seem to be maximizing their international security.[2]

The cases of Costa Rica and Panama are particularly unusual. Of the 20 non-military states that currently exist, Costa Rica and Panama are outliers in terms of their capacity to support a substantial military force. The other 18 states without a military have very small populations and economies, making them less capable of developing militaries that could make a considerable difference to their security.[3] Costa Rica and Panama have the economic and demographic capacity to support substantial armed forces but have chosen not to.[4]

Providing a compelling explanation for why these countries abolished their militaries would contribute significantly to the literature on demilitarization. The existing academic works on the demilitarization of these countries pay little attention to the question of why they abolished their militaries, instead focusing on the consequences of their non-military status. In

[1] Lechner, Silviya. "Anarchy in International Relations." *Oxford Research Encyclopedia of International Studies.*
[2] Inbar, Efraim, and Gabriel Sheffer. *The National Security of Small States in a Changing World*. New York: Routledge, 2013.
[3] World Bank Open Data, May 16, 2024, https://data.worldbank.org/.
[4] Both of these countries have GDPs of over 60 billion USD. Costa Rica has a population of 5.2 million people while Panama's population is about 4.4 million. If these countries chose to spend 2% of their GDP on their armed forces, their military budgets would be over 1.2 billion USD, enough to support militaries that could make a meaningful difference to their national security. World Bank Open Data.

the few cases where scholars have provided explanations for the demilitarization of Costa Rica or Panama, these accounts have been partial, brief, and limited.[5] Existing accounts usually examine either domestic politics or international considerations to explain why Costa Rica or Panama demilitarized, without considering the possibility that both domestic and international-level factors played important and interrelated roles.[6] Furthermore, the possibility that individual factors (such as the personalities of the leaders who adopted demilitarization) contributed to the phenomenon is rarely addressed.[7] The explanations provided by scholars for the demilitarization of Costa Rica and Panama also vary substantially, indicating that the question of why these countries demilitarized has not been settled. There is clearly a need for a more comprehensive and sustained examination of the topic.

This thesis also contributes more broadly to IR theory. The behavior of Costa Rica and Panama appears to contradict some of the most influential assumptions in IR theory, such as the notion that states are power or security maximizers.[8] By developing a deeper understanding of why Costa Rica and Panama demilitarized, this thesis yields insights on the strengths and weaknesses of these theoretical assumptions, and points to other factors which may explain why some states do not maintain militaries.

This thesis uses analytical eclecticism and a levels-of-analysis approach to account for the puzzle of Costa Rica and Panama's demilitarization. The thesis presents several theories at

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[5] Calderon, Ricardo Arias. "The demilitarization of public security in Panama." *Small Wars & Insurgencies*, 11:1 (2000): 97-111; Cummings, David. "Demilitarization: Is It Worth It?" *Faculty of the US Army Command and General Staff College* (2006); Høivik, Tord, and Solveig Aas. "Demilitarization in Costa Rica: A Farewell to Arms?" *Journal of Peace Research* 18, no. 4 (1981): 333–51.

[6] For instance, Calderon's article, "The demilitarization of public security in Panama," focuses only on domestic factors.

[7] One exception is a 1981 article written by Tord Høivik and Solveig Aas, which argues against the notion that Jose Figueres abolished Costa Rica's military for idealistic reasons. Høivik and Aas, "Demilitarization in Costa Rica," 333–51.

[8] Snyder, Glenn H. "Mearsheimer's World-Offensive Realism and the Struggle for Security: A Review Essay." *International Security* 27, no. 1 (2002): 149–73.

the structural, domestic, and individual levels which could potentially explain why Costa Rica and Panama abolished their militaries. These theories are then tested against the facts of the two cases to determine whether they can partially or fully explain Costa Rica and Panama's non-military status.

The core finding that emerges is that both domestic and structural factors played a critical role in the abolition of Costa Rica and Panama's militaries. The ruling regimes of Costa Rica and Panama needed to abolish the armed forces to secure their power and had an opportunity to remove the military while it was weak and unable to retaliate. Meanwhile, their close ties with the hegemonic power in the region, the United States, greatly reduced the risks of demilitarization, and a defense agreement (the Rio Pact) enhanced Costa Rica's security. To account for the non-military status of Costa Rica and Panama, it is therefore necessary to develop an explanation that combines structural and domestic-level factors.

This thesis is divided into five parts. The first section provides a review of the existing literature on the causes of demilitarization as well as a definition of demilitarization that will be employed in the subsequent analysis. In the second section, I describe the methodology that is used to answer the research question of why Costa Rica and Panama demilitarized. This section also provides a justification for the selection of Costa Rica and Panama as cases for understanding demilitarization. The third section establishes the historical background of Costa Rica and Panama's non-military status. The purpose of this section is to allow the reader to place the demilitarization of Costa Rica and Panama in their historical contexts, by describing the evolution of the military, how relations between the government and military usually functioned in these states, and the main events in the international relations of these states. This context

allows readers to gain a deeper understanding of the significance of demilitarization in Costa Rica and Panama and makes the events described in the next section easier to follow.

In the fourth section I test several theories that could explain Costa Rica and Panama's non-military status to evaluate their explanatory power. Finally, the fifth section provides a comprehensive discussion of these findings, showing how it is necessary to combine factors at the structural and domestic levels to explain the demilitarization of these states. This section also examines how these findings contribute to the existing literature on demilitarization, their implications for IR theory, and future research directions.

Section 1: Literature Review

Definition of Demilitarization

The existing scholarship on demilitarization features inconsistent and ambiguous definitions.[9] The term 'demilitarization' is sometimes used to refer to the reduction of a state's armed forces,[10] the unraveling of processes and discourses supporting military action,[11] or to states which have chosen not to maintain militaries.[12] This thesis only examines the latter understanding of demilitarization. More specifically, it defines demilitarization as *the decision of states to not have a military when it would be possible to possess one.*[13] The police forces of non-military states may perform certain military functions such as border patrolling and aerial

[9] Lamb, Guy. (2018). Demilitarisation: A Review of the Concept and Observations from the Southern African Experience.
[10] For an example of an article defining demilitarization in terms of a reduced military presence, see Mintz, A. and Stevenson, R. T. Defense Expenditures, Economic Growth, and The "Peace Dividend": A Longitudinal Analysis of 103 Countries. *Journal of Conflict Resolution*, *39*(2) (1995): 283-305.
[11] Bickford, Andrew, 'Demilitarization: Unraveling the Structures of Violence', in Peter Stearns (ed.), *Demilitarization in the Contemporary World* (Champaign, IL, 2013).
[12] For an example of an academic work defining demilitarization as a state's non-military status, see Cummings, "Demilitarization: Is It Worth It?"
[13] In this account, demilitarization has only occurred in states which have freely chosen not to possess a military. The forced abolition of a country's military by a stronger power will not be considered demilitarization.

reconnaissance, but are nonetheless distinct from militaries in that they are oriented towards enforcing laws and maintaining domestic order rather than confronting foreign threats.[14]

Existing Literature

The literature on demilitarization (in the sense of states which have freely chosen to not maintain militaries) is notably sparse.[15] Despite the fact that twenty countries have adopted a stance of demilitarization, the subject has received relatively little academic attention in IR or political science.[16] The scholars who have examined demilitarization can be divided into three categories. Firstly, there are scholars who write about the demilitarization of a specific case because they are experts on the state and want to contribute to an understanding of that country, rather than demilitarization more generally. For instance, John Lindsay-Poland and Ricardo Arias Calderón are both experts on Panama who have written about the state's demilitarization.[17] Secondly, there are scholars from the fields of Peace and Conflict Studies and Military Studies who study demilitarization to further knowledge about peace, war, and security.[18] For example, Tord Høivik and Solveig Aas are both experts in Peace Studies who have examined the demilitarization of Costa Rica.[19] Some of the works on demilitarization are military studies theses written by junior officers as part of military education programs.[20] Thirdly, there are

[14] It is worth noting that the role of militaries and police forces are not always perfectly distinct. Sometimes, militaries are oriented towards national defense on paper, even though their main role in practice is to confront domestic political threats and maintain order. Lutterbeck, Derek. "Between Police and Military: The New Security Agenda and the Rise of Gendarmeries." *Cooperation and Conflict* 39, no. 1 (2004): 45–68.
[15] It is worth noting that other understandings of demilitarization, such as demilitarization as the reduction of arms or the unraveling of discourses and processes supporting military action, have received substantial academic attention. Lamb, Guy. (2018). Demilitarisation: A Review of the Concept and Observations from the Southern African Experience.
[16] These states are Andorra, Costa Rica, Dominica, Grenada, Iceland, Kiribati, Liechtenstein, Marshall Islands, Mauritius, Micronesia, Monaco, Nauru, Palau, Panama, Saint Lucia, Saint Vincent & the Grenades, Samoa, Solomon Islands, Tuvalu, and Vanuatu. "The World Factbook."
[17] Calderon, "The demilitarization of public security in Panama."; Lindsay-Poland, *Emperors in the Jungle*.
[18] Lamb, "Demilitarisation: A Review of the Concept."
[19] Høivik and Aas "Demilitarization in Costa Rica."
[20] Cummings, "Demilitarization: Is It Worth It?"; Julian Benton, "Eliminating War by Eliminating Warriors," Naval Postgraduate School, 2016.

scholars from IR who have examined the demilitarization of specific countries. For instance, Kyle Longley is an expert on foreign relations who has written about the demilitarization of Costa Rica,[21] while Alison Brysk, an expert on human rights and foreign policy, has examined the demilitarization of Panama.[22]

While some works attempt to explain the causes of demilitarization in particular cases, these contributions to the literature have four main weaknesses. Firstly, they focus disproportionately on the case of Costa Rica, neglecting the similarly puzzling and significant case of Panama.[23] While many works have briefly discussed the causes of Costa Rica's demilitarization, only two articles and a book consider the causes of Panama's non-military status.[24]

Secondly, they rarely compare cases to assess whether there are parallels between different instances of demilitarization.[25] Only a single academic work, David Cumming's "Demilitarization: Is It Worth It," compares the causes of demilitarization across two cases.[26] As a result, it is difficult to identify broader patterns between different cases of demilitarization.

Thirdly, explanations tend to be partial, brief, and limited. Explaining demilitarization is rarely the main goal of the works which address this subject.[27] For example, Kyle Longley's *The Sparrow and the Hawk* mentions some of the events and factors that contributed to the

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[21] Longley, *The Sparrow and the Hawk*.
[22] Brysk, Alison. "Global Good Samaritans? Human Rights Foreign Policy in Costa Rica." *Global Governance* 11, no. 4 (2005): 445–66.
[23] The case of Panama is similarly significant and puzzling because it possesses the resources and capacity to maintain a significant military force, just like Costa Rica.
[24] The works which examine the causes of Panama's demilitarization are Calderon, "The demilitarization of public security in Panama"; Lindsay-Poland, John. *Emperors in the Jungle: The Hidden History of the U.S. in Panama*. American Encounters/Global Interactions. Durham N.C.: Duke University Press, 2003; Sylvia, Ronald D., and Constantine P. Danopoulos. "Civil-Military Relations in a Civilianized State: Panama." *Journal of Political & Military Sociology* 33, no. 1 (2005): 81–96.
[25] A notable exception is Cumming's thesis "Demilitarization: Is It Worth It?"
[26] Ibid.
[27] Høivik and Aas' "Demilitarization in Costa Rica" is an exception, with most of the article being dedicated to explaining why Costa Rica demilitarized.

demilitarization of Costa Rica, but does not make explaining demilitarization its focus.[28] Similarly, David Cumming's thesis only dedicates a few paragraphs to explaining why Costa Rica and Panama demilitarized.[29] Such brief accounts may be unable to capture the complexity of the phenomenon of demilitarization.

Explanations also tend to focus exclusively on either domestic or international factors. For instance, Calderon's explanation of Panama's demilitarization only considers domestic political factors. According to Calderon, Panama demilitarized because the military had just been crushed and the new government had the will to dismantle the military.[30] Meanwhile, Lindsay-Poland's account of Panama's non-military status focuses solely on international factors. According to Lindsay-Poland, Panama was forced to demilitarize by the United States shortly after their 1989 invasion of the country.[31] These two works on Panama point to explanatory factors at different levels of analysis, suggesting that factors at either level of analysis could explain demilitarization. As such, it is necessary to investigate what each level of analysis might reveal about demilitarization and which levels of analysis provide the most persuasive theories. Focusing on a single level of analysis may also lead to incomplete explanations of demilitarization if explanations cannot account for certain aspects of the decision, such as the nature, timing, or scope of demilitarization. For instance, Calderon's account (which focuses on the domestic level) cannot answer the question of why Panama was able to demilitarize without gravely imperiling its national security. Even if the domestic situation was favorable for demilitarization, it seems unlikely that the government of Panama would have adopted such a policy unless particular international circumstances made it safe for them to do so. Calderon does

[28] Longley, *The Sparrow and the Hawk*.
[29] David Cumming, "Demilitarization: Is It Worth It?"
[30] Calderon, "The demilitarization of public security in Panama."
[31] Lindsay-Poland, *Emperors in the Jungle*.

not consider the possibility that demilitarization may have been enabled by both a favorable domestic situation and a favorable international situation. Lindsay-Poland's account is similarly incomplete. Not only does he provide no evidence that demilitarization was forced on Panama, he does not consider the interests, incentives, or agency of Panama's leaders. Even if the US wanted demilitarization as Lindsay-Poland claims, this does not preclude the possibility that the Panamanian government was also enthusiastic about the policy and demilitarized to serve their own interests.

There is also a tendency in the literature to disregard individual factors (such as the characteristics of political leaders) as potential contributors to demilitarization. Only two works, Høivik & Aas's "Demilitarization in Costa Rica" and Lipton & Barash's *Strength through Peace*, address individual factors as a potential contributor to demilitarization.[32] Høivik and Aas reach the conclusion that the individual characteristics of José Figueres did not play a meaningful role in Costa Rica's demilitarization, and that he was driven to undertake the policy by domestic political considerations. Lipton & Barash reach the opposite conclusion, arguing that José Figueres' idealism inspired him to dismantle the military.[33] The fact that scholars have provided differing explanations about the role of individuals suggests that individual-level factors require further investigation.

The fourth and final issue is that explanations for the demilitarization of Costa Rica and Panama vary substantially, indicating that the question of why these countries abolished their militaries has not been settled. For instance, to explain the non-military status of Costa Rica, Høivik and Aas conclude that domestic political considerations played the decisive role in

[32] Høivik and Aas "Demilitarization in Costa Rica." Høivik and Aas reach the conclusion that the individual characteristics of José Figueres did not play a meaningful role in demilitarization, and that he was driven to undertake the policy by domestic political considerations; Judith Lipton & David Barash. *Strength through Peace: How Demilitarization Led to Peace and Happiness in Costa Rica and What the Rest of the World Can Learn from a Tiny Tropical Nation*. 2019. New York NY: Oxford University Press.
[33] Lipton & Barash, *Strength through Peace*.

demilitarization. They point out that the leader of Costa Rica, José Figueres, had strong incentives to abolish the military to maintain his own power.[34] However, other scholars have attributed the country's non-military status to pacifistic cultural traditions.[35] For instance, Julian Benton's thesis cites Costa Rica's pacifistic culture as a crucial factor in the country's demilitarization.[36] Yet another theory is that José Figueres's idealism and personal commitment to peace led to demilitarization.[37] It is worth noting that this theory has been advanced primarily by non-academics in newspaper articles, blog posts, and NGO reports.[38] Only a single recent academic work, Lipton & Barash's *Strength Through Peace*, espouses this theory.[39] Most experts on Costa Rica are now highly critical of the idea that Figueres was a pacifist.[40]

Explanations for the non-military status of Panama are similarly varied. One article, Alison Brysk's "Global Good Samaritans? Human Rights Foreign Policy in Costa Rica," suggests that Costa Rica successfully encouraged Panama to adopt demilitarization for idealistic reasons.[41] As previously mentioned, Calderon's article on the demilitarization of Panama argues that the country's leaders abolished the military because they had the capacity and will to do so.[42] Lindsay-Poland's account of Panama's demilitarization also takes a different stance, arguing that pressure from the United States played a pivotal role in the abolition of the military.[43]

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[34] Høivik and Aas “Demilitarization in Costa Rica."
[35] Booth, John A. *Costa Rica: Quest for Democracy*. of *Nations of the Modern World. Latin America*. New York: Routledge, Taylor & Francis Group, 2018: 30.
[36] Julian Benton, "Eliminating War by Eliminating Warriors," Naval Postgraduate School, 2016.
[37] Kordick, Carmen. *The Saints of Progress: A History of Coffee, Migration, and Costa Rican National Identity*. Tuscaloosa: University of Alabama Press, 2019.
[38] For instance, the Los Angeles Times published a 2013 article which promoted this theory of demilitarization. Barash, David. “Costa Rica’s Peace Dividend: How Abolishing the Military Paid Off.” Los Angeles Times, December 15, 2013.
[39] Lipton & Barash, *Strength through Peace*.
[40] Zamora, Alberto. “Figueres: A ‘Hero of Peace’? More than 50 Academics Disagree.” TribunaMag.com, March 10, 2021.
[41] Brysk, Alison. “Global Good Samaritans? Human Rights Foreign Policy in Costa Rica.” *Global Governance* 11, no. 4 (2005): 445–66.
[42] Calderon, "The demilitarization of public security in Panama."
[43] Lindsay-Poland, *Emperors in the Jungle*.

These issues with the existing explanations of Costa Rica and Panama's non-military status suggest that a more sustained analysis of these cases as well as a more comprehensive approach may be necessary to account for demilitarization. But there is also a larger, theoretical case for this deeper examination: demilitarization is a phenomenon of profound relevance and interest to IR. To understand why Costa Rica and Panama appear to be contradicting widespread theoretical assumptions about security maximization, the question of why these countries demilitarized must be answered more rigorously, with factors at all three levels of analysis being taken into consideration.

Section 2: Methodology

Justification for Case Selection

While twenty states have adopted a stance of demilitarization, the cases of Costa Rica and Panama are particularly puzzling. Costa Rica and Panama are outliers. These states have the largest populations and economies of the non-military countries by a wide margin (see Figure 1). This makes them far more capable of supporting a substantial military than other countries which have abolished their armed forces.[44] Since a state's wealth is strongly correlated with potential military capacity and population is indicative of a military's potential manpower, GDP and population can be used as approximate indicators of a state's ability to support a military.[45] As shown below, most of the demilitarized countries (14) are small island states in Oceania, the Caribbean, and the Indian Ocean. Three states without militaries are European microstates (Andorra, Liechtenstein, and Monaco). The final three non-military countries are Iceland, Costa Rica, and Panama.

[44] Beckley, Michael. "Economic Development and Military Effectiveness." *Journal of Strategic Studies* 33, no. 1 (2010): 43–79.
[45] Ibid.

FIGURE 1: DEMILITARIZED STATES[46]

State	Population	GDP (billions of USD)	Region
Andorra	79,824	3.35	Europe
Costa Rica	5,180,829	69.24	Central America
Dominica	72,737	0.607	Caribbean
Grenada	125,438	1.22	Caribbean
Iceland	382,003	28.06	Europe
Kiribati	131,232	0.223	Oceania
Liechtenstein	39,327	7.71	Europe
Marshall Islands	41,569	0.259	Oceania
Mauritius	1,262,523	12.95	Africa
Micronesia	114,164	0.424	Oceania
Monaco	36,469	8.78	Europe
Nauru	12,668	0.152	Oceania
Palau	18,055	0.233	Oceania
Panama	4,408,581	76.52	Central America
Saint Vincent and the Grenadines	103,948	0.949	Caribbean
Samoa	222,382	0.833	Oceania
Solomon Islands	724,273	1.6	Oceania
St. Lucia	179,857	2.34	Caribbean
Tuvalu	11,312	0.059	Oceania
Vanuatu	326,740	1.06	Oceania

[46] Source: World Bank Open Data, May 16, 2024, https://data.worldbank.org/.

Costa Rica and Panama have populations of 5.181 million and 4.409 million respectively. The next two largest non-military countries in terms of population are Mauritius (1.263 million) and the Solomon Islands (724,000). The rest of the non-military states have less than half a million inhabitants. Some of the populations of these states are among the smallest in the world. For instance, Tuvalu, Nauru, and Palau have populations of 11,312, 12,668, and 18,055 respectively.

Costa Rica and Panama also have by far the largest GDPs of any non-military country. Costa Rica's GDP is 69.2 billion while Panama's GDP is 76.5 billion. Both of these economies are large enough to support considerable militaries.[47] Iceland and Mauritius, the third and fourth largest economies of non-military countries, have GDPs of only 28.1 billion and 13 billion USD respectively. Most non-military states (12) have GDPs under 2 billion USD.

Since Costa Rica and Panama are the only non-military states which could afford to maintain substantial militaries, their approach to national security is particularly unusual and worthy of explanation. One might claim, however, that this case selection has limitations, since both countries are from a similar geographical context and the insights drawn from a particular region may have limited generalizability. The overarching goal of my analysis, however, was to focus on more difficult cases while rooting out the easy cases of why a state would have no military. For instance, it is not surprising that Tuvalu, a country with only 11,312 citizens and a GDP of 59 million USD, would not bother maintaining a military. Tuvalu simply lacks the resources to put up a significant defense. Answering the question of why Tuvalu has no military would reveal little about international relations, since Tuvalu's behavior is not puzzling. The method I employed for case selection was not geography, but rather focusing on those instances

[47] Beckley, "Economic Development and Military Effectiveness."

which feature the largest discrepancy between their lack of a military and their capacity to possess a military.

The fact that Costa Rica and Panama are outliers in terms of GDP and population makes them the most difficult cases to explain and therefore the best cases for our analysis. The close geographical proximity of these cases is either a coincidence or, more likely, an indication that regional factors may have played a role in the demilitarization of these states. Even if my analysis finds that regional factors contributed to the demilitarization of Costa Rica and Panama, this would not limit the utility of my study to IR, since it would reveal that certain regional factors are relevant to the decision of some states to demilitarize.

Methodology

This study approaches the research question from a standpoint of analytical eclecticism. This approach tends to yield explanations that take multiple seemingly unrelated factors into account, allowing scholars to see how a wide range of factors interact to produce certain outcomes.[48] Analytical eclecticism encourages scholars to answer questions by bringing together factors from different levels of analysis and research traditions, rather than striving to prove the validity of a particular paradigm. Analytical eclecticism is thus question-driven, rather than paradigm-driven, allowing scholars to focus on explaining complex phenomena without being limited by the assumptions and epistemic commitments of particular paradigms.[49]

This study also uses a levels of analysis framework to choose the different factors and theories that are tested as part of the eclectic approach.[50] I present several theories at the structural, domestic, and individual levels which could potentially account for Costa Rica and

[48] Sil, Rudra, and Peter J. Katzenstein. "Analytic Eclecticism in the Study of World Politics: Reconfiguring Problems and Mechanisms across Research Traditions." *Perspectives on Politics* 8, no. 2 (2010): 411–31.
[49] Sil and Katzenstein, "Analytic Eclecticism in the Study of World Politics."
[50] Singer, J. David. "The Level-of-Analysis Problem in International Relations." *World Politics* 14, no. 1 (1961): 77–92.

Panama's demilitarization. These theories are then tested against the facts of the two cases to determine whether they can partially or fully explain Costa Rica and Panama's non-military status.

Combining analytical eclecticism with a levels of analysis approach is well-suited to the research question. The phenomenon of demilitarization requires an examination of a wide range of factors at the structural, domestic, and individual levels, since the literature review has suggested that variables at each of these levels of analysis could plausibly shape a state's decision to abolish their military and these different levels have been incorporated into existing studies of Costa Rica and Panama's demilitarization. States keep militaries not only to defend against or attack other nations but as a means of maintaining domestic security or political power.[51] As such, international factors must be considered alongside state-level variables. Individual-level factors may also be important, since individual leaders are ultimately responsible for the decision to demilitarize. Taking all three of these levels of analysis into account reduces the risk of producing incomplete explanations for demilitarization that neglect important variables.[52]

An eclectic levels of analysis approach is also useful to help identify links between factors at different levels. For a complex phenomenon such as demilitarization, there is always a possibility that variables at different levels of analysis interacted to produce the non-military status of a state. An eclectic levels of analysis approach makes it easier to see the connections between factors at different levels of analysis.[53]

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[51] Lutterbeck, Derek. "Between Police and Military: The New Security Agenda and the Rise of Gendarmeries." *Cooperation and Conflict* 39, no. 1 (2004): 45–68.
[52] Singer, "The Level-of-Analysis Problem in International Relations," 77-92. Singer points out that focusing exclusively on a single level of analysis can lead researchers to neglect or under-emphasize important variables.
[53] Sil et al., "Analytic Eclecticism," 411–31.

It is worth noting that some scholars have criticized analytical eclecticism.[54] For instance, some scholars have argued that the different paradigms analytical eclecticism attempts to bridge (such as realism, liberalism, and constructivism) are mutually incommensurable. According to this argument, observations are not objective but shaped by the theories that are being employed, so two observers using different theories or paradigms are very likely to disagree about what is being observed. As such, these critics argue that combining different paradigms introduces metatheoretical difficulties that analytical eclecticism is not prepared to confront.[55] Other scholars have criticized analytical eclecticism as being unsuitable for accommodating post-positivist methodologies such as feminist, critical constructivist, and interpretivist approaches.[56]

While analytical eclecticism has some weaknesses, it is still a useful methodological approach for explaining demilitarization. Ultimately this study does not need to reconcile the major paradigms of IR or integrate the post-positivist approaches of critical scholarship. The object of this study is simply to answer the question of why Costa Rica and Panama demilitarized, and for this purpose, it is necessary to consider many different theories. The alternative would be to approach the research question from a limited perspective or set of theoretical assumptions, a strategy that would risk neglecting important variables.

To apply an eclectic levels of analysis approach, this thesis chooses several theories at each level of analysis which could potentially account for demilitarization. When choosing these theories, the goal was to ensure that most of the plausible potential explanations of Costa Rica and Panama's demilitarization are considered. The thesis draws from key IR theories to identify

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[54] Chernoff, F., Cornut, J., & James, P. (2020). Analytic eclecticism and International Relations: Promises and pitfalls. *International Journal*, *75*(3), 383-391.
[55] Chernoff et al., Analytical eclecticism and International Relations.
[56] Peet, Jessica. “Eclecticism or Exclusivity? the (Critical) Pragmatist Ethos of (Intersectional) Analytic Eclecticism.” *International Journal* 75, no. 3 (2020): 420–32.

potential explanations. For instance, the thesis tests whether the structural realist frameworks of John Mearsheimer and Kenneth Waltz can help explain the demilitarization of Costa Rica and Panama.[57] After presenting the theoretical explanations that will be tested, this study assesses their explanatory power.

It is worth noting that some of the theoretical explanations that are tested by the levels of analysis framework have not been formally developed by scholars to explain demilitarization. Instead, I extrapolate from existing theories to provide hypothetical explanations which might account for the demilitarization of a state. For example, one of the structural theories that the thesis examines is the notion that the geographical advantages of Costa Rica and Panama can help explain why they decided to abolish their militaries. This is not a formal theory discussed by demilitarization scholars, but it is a plausible explanation for the non-military status of a country, adapted from existing theoretical literature.[58] As such, it is included in the analysis as a theoretical explanation to be tested.

Testing each of the theoretical explanations requires qualitative analysis. Assessing their explanatory power involves two stages. First this study examines the context of Costa Rica and Panama at the time of their demilitarization (in 1948 and 1990 respectively) to assess whether the theory is plausible. A theory is considered plausible if the causal factors identified by the theory are present in Costa Rica or Panama at the time of their demilitarization. For instance, this study tests the theory that Costa Rica and Panama demilitarized because they possessed pacifistic political cultures that led citizens and civil society organizations to pressure the government to

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[57] Mearsheimer, John J. "Back to the Future: Instability in Europe after the Cold War." *International Security* 15, no. 1 (1990): 5–56; Waltz, Kenneth N. *Theory of International Politics*. Addison-Wesley Series in Political Science. Reading, Mass.: Addison-Wesley Pub, 1979.

[58] To the best of my knowledge, none of the scholars who have attempted to explain the non-military status of states have examined the possibility that geographical factors such as natural defenses contributed to demilitarization. Scholars who have attempted to explain the non-military status of states include Solveig Aas, Ricardo Calderon, Peter Calvert, Carmen Kordick, Tord Høivik, Kyle Longley, and Peter Stearns.

demilitarize. To assess whether the theory is plausible, this study first checks whether Costa Rica and Panama had pacifistic political cultures at the time of their demilitarization. If they did not, the theory is implausible and will be disregarded as a potential explanation.

If the theory is plausible, this study then tests whether the dynamics that would be expected from the theory are observable in the cases. For example, if pacifistic political cultures caused Costa Rica and Panama's demilitarization, one would expect to find evidence of individuals, civil society organizations, or political parties pushing the government to demilitarize for pacifistic reasons. This study would look for evidence of protests, petitions, manifestos, policy platforms, and speeches supporting demilitarization. Furthermore, it would carefully consider the timing of the pacifistic political activity to determine whether a causal link between pacifistic political activity and demilitarization is likely. For example, if Costa Rica or Panama demilitarized several years after political activity against the military, then the theory that a pacifistic political culture led to demilitarization would not be convincing. However, if demilitarization occurred shortly after mass protests against the military, the pacifistic political culture theory would be more convincing since there would be a high likelihood that the protests contributed to demilitarization. By testing each of the theories to check whether they are plausible and the dynamics implied by the theory are present, a qualitative, eclectic levels of analysis approach can answer the question of why Costa Rica and Panama demilitarized.

Section 3: Context of Costa Rican and Panamanian Demilitarization

This section describes the evolution of the military, how relations between the government and military functioned in these states, and the main events in the international relations of these states. The purpose of this section is to allow the reader to place the demilitarization of Costa

Rica and Panama in their historical contexts. This context allows the reader to gain a deeper understanding of the significance of demilitarization in Costa Rica and Panama and makes the events described in Section 4 easier to follow.

The Demilitarization of Costa Rica

The land which comprises modern Costa Rica was conquered by the Spanish in the 16th century and became a poor, marginal, and largely depopulated colony.[59] After gaining its independence from Spain in 1821, Costa Rica was initially part of the short-lived Federal Republic of Central America, before attaining full nationhood in 1835. The new state developed a military which became increasingly important in subsequent decades. When a group of American military adventurers led by William Walker tried to conquer Central America in the 1850s, Costa Rica played a major role in defeating the invaders. This war became an important part of Costa Rica's national identity and increased the power and prestige of the military.[60]

In 1871, the military took advantage of its strong position and seized power, ruling until 1889. During this period, the military comprised about 10% of Costa Rica's entire population. Civilian rule returned but the military briefly seized power again from 1917 to 1919, until US pressure and a popular uprising brought an end to the military dictatorship.[61] In 1921, two competing banana companies provoked a conflict between Costa Rica and Panama known as the Coto War. The Costan Rican military fought intermittent skirmishes with Panamanian forces and achieved minor successes. The Coto War ended in favor of Costa Rica with US diplomatic intervention.[62] At this point, Costa Rican leaders assumed their state was secure due to their close

[59] Díaz Arias, David, Ronny José Viales Hurtado, and Juan José Marín Hernández. *Historical Dictionary of Costa Rica*. New edition. Lanham, Maryland: Rowman & Littlefield, 2019.
[60] Arias et al., Historical Dictionary of Costa Rica.
[61] Høivik and Aas “Demilitarization in Costa Rica."
[62] Colby, Elbridge. “The United States and the Coto Dispute between Panama and Costa Rica.” *The Journal of International Relations* 12, no. 3 (1922): 372–78.

ties with the US and growing American dominance in the region.[63] Complacency contributed to a decline in Costa Rica's military capabilities. Meanwhile, labor unrest was becoming a major issue for Costa Rica's political elites, who owned plantations and benefited from cheap labor. During the 1930s, Costa Rica's political leaders reshaped the military into a tool for putting down strikes, diminishing the military's role as an instrument of national security. By the 1940s, the military was in a derelict state, with officers appointed on an entirely political basis and removed with each new administration. The armed forces were small, poorly trained, and lacking in organization and military spirit. In 1948, Costa Rica's military had only 1000 men and a single unit of light combat vehicles.[64]

Meanwhile, political and ideological rifts were deepening within Costa Rica. The ruling party, the Partido Republicano Nacional (PRN), unexpectedly decided to cooperate with the Costa Rican Communist Party, sparking fears of a communist takeover. This volatile political situation became a constitutional crisis when the President of Costa Rica and leader of the PRN, Teodoro Picado, refused to recognize the victory of his opponent Otilio Ulate in the 1948 election. In response, a small-scale plantation owner named Jose Figueres assembled a 'National Liberation Army' of 600 fighters, with the stated aim of protecting the constitution and establishing Ulate as president. The Costa Rican military obtained 500 reinforcements from Nicaragua's dictator Anastasio Somoza and 3000 volunteers from the Vanguardia Popular, a communist labor organization. However, the Costa Rican military lacked weapons with which to arm their volunteers, leaving the army in a weak state. Figueres led a swift military campaign that took the numerically superior but disorganized Costa Rican military off guard. Shortly after

[63] Høivik and Aas “Demilitarization in Costa Rica."
[64] Ibid.

capturing the capital, he formed a provisional government and declared the abolition of the Costa Rican military for pacifistic reasons.

The Demilitarization of Panama

Like Costa Rica, the land that comprises modern day Panama was conquered by the Spanish in the 16th century and gained its independence in 1821. Panama joined the short-lived Gran Colombia federation, but its leaders regretted the decision and launched three abortive independence movements in 1830, 1831, and 1840.[65] Throughout the 19th century, Panama was a poor and remote province whose separatist impulses were furthered by the lack of roads and trade connections with the rest of the state.

In 1846, the US signed the Mallarino-Bidlack treaty with Colombia, gaining transit rights and the right to intervene militarily in Panama. This marked the beginning of extensive US involvement in the isthmus. A few years later, in 1855, American investors built a railway linking the Atlantic and Pacific oceans. With a crucial piece of transportation infrastructure in Panama, the US began to launch frequent military interventions in the province. After failed British and French attempts to build a transoceanic canal, the US set their sights on completing the project. When Colombia rejected a US offer for canal rights, the US encouraged Panama to separate. The US immediately recognized Panama as an independent state and signed a favorable canal treaty with the country.[66] Panama's new constitution gave the US the right to intervene militarily to reestablish public peace and constitutional order when necessary.[67]

Barely a year after Panamanian independence, the newly-formed military attempted to seize power, prompting President Manuel Amador Gerrero to dissolve the military.[68] The US

[65] Lindsay-Poland, *Emperors in the Jungle*.
[66] Ibid.
[67] Ibid.
[68] Calderon, "The demilitarization of public security in Panama."

supported the decision as a means of preventing future disturbances. The only public security organization left was the National Police, a weak and poorly armed institution. When the Panama Canal finally opened in 1914, the US decided that the National Police should be weakened, presumably to foreclose the possibility of Panama seizing the canal. In 1916, Panama submitted to US demands and partially disarmed National Police units in port cities near the canal. When the Coto War broke out in 1921, Panama's leaders established a military, but dismantled it once the war was over.

From 1921 to 1968, Panama continued to lack a military. However, the National Police was becoming increasingly militarized and started to get involved in politics. In 1941, the National Police helped civilian politicians overthrow an elected president. In 1952, a former head of the National Police, José Antonio Remón Cantara, was elected president and instituted reforms that strengthened the organization. Remón rebranded the National Police as the National Guard shortly before his assassination in 1955. Remón's reforms turned the National Guard into a military in all but name. The National Guard grew more independent, belligerent, and repressive, until finally launching a coup against the civilian government in 1968. The National Guard, led by Omar Torrijos, formed a military dictatorship which ruled the country from 1968 to 1989. The transition from a national police force to a military organization was complete. Under Torrijos, the military rapidly expanded, from 4000 members and a budget of 9 million USD in 1968 to 8000 members and a budget of 42 million USD in 1989.[69] During this process of militarization and military takeover the US voiced no opposition, seeing the National Guard as a reliable supporter of US interests in the region.[70]

[69] Ibid.
[70] Ibid.

In 1983, after the death of Torrijos in a plane accident, a military officer in the National Guard, Manuel Noriega, seized power. Noriega rebranded the National Guard as the Panama Defense Forces and rapidly expanded the armed forces to 16,000 members and a budget of 150 million.[71] At this point, Panama's militarization reached its zenith. Noriega, however, lost US support when it became clear that he was lining his pockets by facilitating the smuggling of illegal drugs into the United States. As evidence of his smuggling activities became widely publicized in the US, President George H. W. Bush felt domestic pressure to intervene. In 1989, Noriega annulled an election which he lost in a landslide and had his opponent, Guillermo Endara, beaten up in the streets, further souring relations with the US. Later that year, the US invaded Panama in "Operation Just Cause," swiftly defeating the Panamanian military and capturing Noriega. The US put Endara in charge of the Panamanian government. In 1990, Endara dismantled the Panamanian military.[72]

Section 4: Testing Theories and Findings

Theories to be Tested

This study tests four structural theories, three domestic-level theories, and one individual-level theory.

Structural theories. The first of these theories posits that Costa Rica and Panama had natural defensive advantages that made a substantial military less necessary. To test this theory, I will examine whether Costa Rica and Panama have certain geographical features, such as mountainous terrain or rivers near their borders, which would impede foreign attacks. The second theory is that Costa Rica and Panama demilitarized because these countries lack strategic

[71] It is worth noting that the military budget expanded far more rapidly than the expansion of military personnel, a fact which speaks to the corruption of the enterprise. Noriega was taking money from the budget for his own personal use and handing out enormous cash bribes to secure the support of his officers. Ibid.
[72] Ibid.

value and thus are unlikely to be attacked or invaded by a foreign power. I will test this theory by assessing whether Panama and Costa Rica have any features such as valuable resources or positions along important trade routes that might give other states incentives to attack. The third type of theories are the realist frameworks developed by Kenneth Waltz and John Mearsheimer, which seek to explain the behavior of states in terms of the constraints imposed by an anarchic international system.[73] To test these theories, I will examine whether Costa Rica and Panama's decisions to demilitarize are compatible with Waltz's assumption that states are security-maximizers and Mearsheimer's claim that states seek to maximize power. The fourth and final structural theory is that Costa Rica and Panama demilitarized because they are adequately protected by a collective security agreement known as the Rio Pact, which reshaped the security dynamics in the region in ways that affected the strategic choices of states. I will test this theory by assessing whether Costa Rica and Panama could rely on the Rio Pact for their security at the time of their demilitarization.

Domestic level theories. The first domestic-level theory is that the regime type of Costa Rica and Panama (democracy) contributed to their decisions to demilitarize. Scholars have observed that democracies spend less on their militaries than autocracies and explain this discrepancy in several ways. Some scholars have argued that democracies spend less on their militaries because democratic leaders are more accountable to the public and people generally do not want high levels of military spending. Another explanation is that it is in the interest of dictators to spend more on the military than democratic leaders, due to the importance of the military for maintaining power.[74] Finally, another explanation is Democratic Peace Theory,

[73] Snyder, Glenn H. "Mearsheimer's World-Offensive Realism and the Struggle for Security: A Review Essay." *International Security* 27, no. 1 (2002): 149–73.
[74] Ibid.

which claims that democracies do not go to war with each other.[75] If this is the case, democracies which are surrounded by other democracies may decide that maintaining a military is less necessary. To test the theory that democracy led to demilitarization, this study will examine whether any of these explanations are compelling in the context of Costa Rica and Panama.

The second domestic-level theory is that Costa Rica and Panama's non-military status was shaped by their pacifistic political cultures. I will test the theory by determining whether Costa Rica and Panama had particularly pacifistic political cultures at the time of their demilitarization. The third and final domestic-level theory is that the ruling regimes of Costa Rica and Panama abolished the military to safeguard their own political power. To test this theory, I will assess whether the political leaders of Costa Rica and Panama were threatened by the existence of the military at the time of demilitarization.

Individual level theories. Only one individual-level theory is tested. According to this theory, individual characteristics of Costa Rica and Panama's leaders shaped the decisions to demilitarize. If other leaders had been in power instead of Figueres and Endara, they could have responded to the international and domestic context differently, and the abolition of Costa Rica and Panama's militaries likely would not have happened. To test this theory, I will examine whether Figueres and Endara had specific character traits or ideological beliefs that may have led them to dismantle the military. If Figueres or Endara do possess such traits, I will assess whether these traits played a decisive role by considering whether politicians without these traits would have been likely to dismantle the military anyway.

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[75] Ibid.

Findings: Structural Theories

1) One could argue that Costa Rica and Panama do not maintain militaries because their fortuitous geography renders a substantial military unnecessary.[76] Costa Rica and Panama possess remarkable defensive advantages. Both of these states are dominated by dense rainforests and mountainous terrain that would be difficult to traverse and occupy in the case of an invasion.[77] Hypothetically, the rugged topography and thick forestation could conceal insurgent forces, enabling them to impose high costs on the invaders.[78] Furthermore, Costa Rica and Panama's land borders are narrow and connected by only a few roads.[79] For instance, Costa Rica's border with Nicaragua is only linked by two roads, and much of this border consists of a broad river that is not spanned by any bridges. In the case of Panama, this state only borders Costa Rica and Colombia. Its border with Costa Rica is connected by two roads and consists mostly of mountainous rainforest. Its border with Colombia to the southeast is even more fortuitous for defense. The Darién Gap does not contain any roads and is covered by dense rainforests, making an overland invasion from Colombia practically impossible.[80] The limited number of possible overland approaches into Costa Rica and Panama are considerable defensive advantages, since invading forces would be funneled towards a few predictable routes, limiting

[76] Calvert, Peter. "Demilitarisation in Latin America." *Third World Quarterly* 7, no. 1 (1985): 31–43.
[77] Google Maps. "Costa Rica." Accessed April 11, 2023. https://www.google.com/maps/@8.3515332,-87.0594622,7z; Google Maps. "Panama." Accessed April 11, 2023. https://www.google.com/maps/@8.37611,-81.229844,8z.
[78] Fearon, James D. "Rationalist Explanations for War." *International Organization* 49, no. 3 (1995): 379–414.
[79] Google Maps. "Costa Rica."
[80] Google Maps. "Panama."

their mobility and leaving them exposed to ambushes.[81] While Costa Rica and Panama have large coastlines, amphibious invasions tend to strongly favor the defender.[82]

It is worth noting that in 1990, Panama did have one major geographical weakness. The United States owned the Panama Canal, a vital piece of infrastructure running through the middle of the country. The United States also possessed numerous military bases around Panama City and Colón, the two most important cities in Panama.[83] When the United States invaded Panama in 1989, they successfully exploited these weaknesses to defeat Noriega and the Panamanian military in only two weeks.[84] While Panama possessed excellent natural defenses against most potential enemies in the region, they were highly vulnerable to the United States.

One could argue that the geographical advantages of Costa Rica and Panama can help explain why they decided to abolish their militaries. With such strong natural defenses, maintaining a military might have been unnecessary to deter or respond to military threats. However, this theory cannot account for the demilitarization of Costa Rica and Panama. In fact, their fortuitous defensive geography makes their lack of a military more difficult to explain. Geographical features that provide defensive advantages are force multipliers, not defenses in themselves.[85] To fully exploit the benefits of rugged terrain, narrow borders, and limited overland entrances into the country, a substantial military is necessary.[86] In this context, Costa Rica and

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[81] The defensive advantages of funneling enemy forces onto a limited number of roads was recently demonstrated in the Ukraine War, when the predictable approach of Russian columns along a few key roads allowed Ukrainian forces to repulse and inflict heavy casualties on a superior invading force. Khurshudyan, Isabelle, and Paul Sonne. "Battle for Kyiv: Ukrainian Valor, Russian Blunders Combined to Save the Capital." The Washington Post. WP Company, August 24, 2022. https://www.washingtonpost.com/national-security/interactive/2022/kyiv-battle-ukraine-survival/.
[82] CNA, *Charting the Pathway to OMFTS: A Historical Assessment of Amphibious Operations From 1941 to the Present* (Alexandria, Virginia: 2002), https://www.cna.org/reports/2002/D0006297.A2.pdf.
[83] Joint History Office, Operation Just Cause (Washington, DC: Office of the Chairman of the Joint Chiefs of Staff, 1995), https://www.jcs.mil/Portals/36/Documents/History/Monographs/Just_Cause.pdf.
[84] Head, William P. "'Gunships and "Ding-Bats": U.S. Military Operations During "Just Cause."'" *Journal of Third World Studies* 28, no. 2 (2011): 87–105.
[85] John Collins, *Military Geography for Professionals and the Public* (Washington, DC: National Defense University Press).
[86] Collins, *Military Geography*.

Panama's demilitarization was not a rational response to their geographical circumstances, but a missed opportunity to strengthen their defenses with only modest investments in their armed forces.

Another weakness of this theory is that it assumes that Costa Rica or Panama would face a conventional attack by a power seeking to occupy the country. However, another possibility is that a foreign power would simply bomb the state until it was compelled to grant concessions. While Costa Rica and Panama possess defensive geographical advantages, these advantages would do little to spare these states from air attacks on key infrastructure and urban centers. Without a considerable investment in air defense systems, both states would be highly vulnerable to air attacks. Costa Rica and Panama would therefore need to invest in their militaries to reduce their vulnerability to devastating air attacks.

Considering the weaknesses of this theory, the natural geographic defenses of Costa Rica and Panama cannot account for their demilitarization.

2) Another potential theoretical explanation for Costa Rica and Panama's demilitarization is that their lack of strategic value made an invasion unlikely. If Costa Rica and Panama were not strategically valuable at the time of their demilitarization, other states may not have had an incentive to act aggressively towards them or threaten their security. States which behave aggressively in international relations often face diplomatic and reputational costs, so it might not be worthwhile for states to invade a strategically unimportant country. Costa Rica and Panama may have calculated that costly attacks by others were unlikely, thus making it unnecessary to maintain a military.

In the context of non-military states in general, the strategic value theory may have some merit. Most non-military states are small islands or archipelagos with limited populations,

economies, and resources. One could argue that these countries have less need for a military because they offer little of value to potential invaders. In this sense, insignificance might be its own strength, allowing weak states to survive without maintaining a military.

However, this explanation is not convincing in the cases of Costa Rica and Panama. Both countries occupy critical choke points between North and South America.[87] Costa Rica and Panama play an important role in controlling the flow of goods and people between the two continents.[88] Meanwhile, Panama contains one of the most important pieces of infrastructure in the world, the Panama Canal. Without access to this canal, cargo, passenger, and military ships would have to take a detour of up to 15,000 km around South America.[89] The US Navy regularly uses this canal to cut travel times for its aircraft carriers, submarines, destroyers, and cruisers.[90]

However, even if one assumes that Costa Rica and Panama were strategically unimportant and thus not worth invading, it is worth considering that countries in this region with little apparent strategic value have faced foreign aggression before. For instance, Grenada, a small archipelago in the Caribbean, was invaded by the United States in 1983. The US invaded Grenada to overthrow a communist military junta which had taken power days earlier, fearing that the new government would be too closely aligned with the Soviet Union.[91] This example highlights the fact that states are not only attacked because of their strategic value. For instance, during the Cold War, there was a widespread belief among US decision-makers that ideological homogeneity was required in the Western Hemisphere. Any state which became communist was

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[87] Calvert, “Demilitarisation in Latin America," 31–43.
[88] Department of State, Integrated Country Strategy (Washington, DC: 2022), https://www.state.gov/wp-content/uploads/2022/07/ICS_WHA_Costa-Rica_Public.pdf.; Manwaring, Max G. “The Security of Panama and the Canal: Now and for the Future.” *Journal of Interamerican Studies and World Affairs* 35, no. 3 (1993): 151–70.
[89] Manwaring, “The Security of Panama," 151–70.
[90] Wood, Mark. “Can US Aircraft Carriers Pass Through Panama Canal?” The Maritime Post, December 23, 2022. https://themaritimepost.com/2022/12/can-us-aircraft-carriers-pass-through-panama-canal/.
[91] Britannica, T. Editors of Encyclopaedia. "U.S. invasion of Grenada." *Encyclopedia Britannica*, April 30, 2024.

considered a direct threat to the United States.[92] The US frequently acted on this belief by invading or intervening in states which became communist. States may also attack or invade foreign powers which develop close relations with a hostile state, in an attempt to reverse the shifting allegiances. As such, states cannot count on their security merely because they lack strategic value. Costa Rica and Panama should have been wary of foreign intervention, even if they didn't occupy strategically important positions.

3) The third type of theory that could explain the demilitarization of Costa Rica and Panama are the structural realist frameworks developed by Waltz and Mearsheimer. Waltz and Mearsheimer present international politics as an anarchic system where states cannot rely on a central authority to ensure their survival.[93] The anarchic nature of international politics motivates states to prioritize their survival above all other considerations. While both Waltz and Mearsheimer argue that survival is the primary motivation of states, they disagree about how states seek to protect themselves. Waltz (a defensive realist) argues that states want to increase their security while Mearsheimer (an offensive realist) claims that states are intent on maximizing their power.[94]

The structural theory of Mearsheimer cannot account for the decision of Costa Rica and Panama to demilitarize. To maximize power as Mearsheimer understands it, Costa Rica and Panama would have needed to maintain a military force. Since states cannot trust the intentions of other states, it is necessary for states to increase their power whenever possible.[95] Mearsheimer presents military strength as vital to maximizing power, and claims that every

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[92] Slater, Jerome. "Dominos in Central America: Will They Fall? Does It Matter?" *International Security* 12, no. 2 (1987): 105-134.
[93] Harknett, Richard J., and Hasan B. Yalcin. “The Struggle for Autonomy: A Realist Structural Theory of International Relations.” *International Studies Review* 14, no. 4 (2012): 499–521.
[94] Mearsheimer, John J. “Back to the Future: Instability in Europe after the Cold War.” *International Security* 15, no. 1 (1990): 5–56; Snyder, “Mearsheimer’s World-Offensive Realism," 149–73.
[95] Snyder, “Mearsheimer’s World-Offensive Realism," 156.

increment of power increases a state's chances of survival in an anarchic international system.[96] As such, according to Mearsheimer's theory of offensive realism, Costa Rica and Panama should never have demilitarized. Instead, they should have increased their military spending to maximize their power. Of course, one could argue that this would be self-defeating, since increasing military spending could cause a security dilemma in which nearby states feel threatened and improve their military capabilities in response. The resulting arms race could fuel tensions and lead to conflict, potentially undermining the security of both parties. However, Mearsheimer is skeptical about security dilemma arguments and rejects the notion that strategies to increase power are self-defeating.[97] He instead subscribes to the view "that the best defense is a good offense," a notion which Costa Rica and Panama clearly did not follow when they chose to demilitarize.[98] Mearsheimer's theory does not align with the behavior of Costa Rica and Panama.

Waltz's theory is more useful for explaining the demilitarization of Costa Rica and Panama. Waltz acknowledges that states sometimes increase their chances of survival by siding with a stronger power, a strategy referred to as 'bandwagoning.'[99] This strategy is one way that states can provide for their own security without maintaining a military.[100] Applying Waltz's theory to the context of Costa Rica and Panama, it is evident that both of these states were bandwagoning with the United States when they demilitarized. In 1948, when Costa Rica abolished its military, the country had very strong ties with the hegemonic power in the region,

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[96] Ibid., 158.
[97] Snyder, "Mearsheimer's World."
[98] Mearsheimer, John J. *The Tragedy of Great Power Politics*. Updated edition. New York: W.W. Norton & Company, 2014.
[99] Waltz, Kenneth N. *Theory of International Politics*. Addison-Wesley Series in Political Science. Reading, Mass.: Addison-Wesley Pub, 1979.
[100] Waltz, *Theory of International Politics*.

the United States.[101] In fact, Costa Rica had been on good terms with the United States ever since the 1840s.[102] They sided with Washington on every major international issue, including the American Civil War, World War I, the rise of fascism and communism, and World War II.[103] In return, Washington respected Costa Rica's sovereignty and refrained from interfering in their political affairs. By 1948, Costa Rica's alliance with the United States had become particularly strong, due to their shared participation in WWII and their anti-communist commitments.[104] Costa Rica could rely on their alliance with the United States to protect them. As such, Costa Rica did not need a military to safeguard their national security.[105]

When Panama demilitarized it was also an ally of the United States. After invading Panama in 1989 and overthrowing Manuel Noriega's military dictatorship, the United States needed a politician who could restore stability to Panama while reliably respecting their interests.[106] Endara was the most suitable candidate, particularly since he had won the 1989 election and therefore had democratic legitimacy.[107] Endara recognized that maintaining a strong alliance with the United States was a wise strategy, since he could obtain financial aid while greatly increasing the security of Panama.[108] Panama would be secure if Endara developed strong ties with the United States, because the US wouldn't re-invade a country that reliably supported its interests. Endara therefore bandwagoned with the United States, a strategy that allowed him to abolish Panama's military without endangering the country's national security.

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[101] Longley, Kyle. *The Sparrow and the Hawk: Costa Rica and the United States during the Rise of José Figueres*. Tuscaloosa: University of Alabama Press, 1997: 1-20.
[102] Ibid.
[103] Ibid.
[104] Ibid.
[105] Ibid.
[106] Harding, Robert C. (2006). *The History of Panama*. Greenwood Press.
[107] Harding, *The History of Panama*.
[108] "Endara Seeks U.S. Aid, Plans First Foreign Trip." UPI. UPI, January 19, 1990. https://www.upi.com/Archives/1990/01/19/Endara-seeks-US-aid-plans-first-foreign-trip/6445632725200/.

While Waltz's theory can partially explain why Costa Rica and Panama were able to demilitarize, it is not sufficient to account for their non-military status. It does not explain why these two states in particular chose to abolish their militaries while other bandwagoning states did not. Many bandwagoning states have not demilitarized just because they have formed an alliance with a stronger power.[109] For instance, Armenia, Belarus, Cambodia, Myanmar, North Korea, Pakistan, and Serbia have each engaged in bandwagoning without demilitarizing. Furthermore, while Waltz's theory shows how bandwagoning allowed Costa Rica and Panama to demilitarize without endangering their security, it does not provide any reason these states would have wanted to abolish their military. Why not bandwagon and maintain a military just in case? Costa Rica and Panama must have had a reason to change the status quo and abolish their militaries, even after bandwagoning had made demilitarizing feasible. As such, Waltz's theory is a necessary component of explaining demilitarization but not a sufficient one. There must be another factor or factors which (combined with Waltz's theory of bandwagoning) can account for demilitarization.

4) The fourth and final structural theory is that the Rio Pact made maintaining a military unnecessary for Costa Rica and Panama. The Rio Pact (formally referred to as the Inter-American Treaty of Reciprocal Assistance) is an international agreement between the United States and most states in Latin America which came into force in 1948. The Rio Pact established the Organization of American States (OAS), an institution which is formally responsible for settling disputes between countries.[110] One of the central provisions of this agreement is Article 3, a collective security guarantee which obligates all members to defend any

[109] Motin, Dylan. *Bandwagoning in International Relations: China, Russia, and Their Neighbors*. (Vernon Press: Delaware, U.S.). 2024.
[110] Høivik, Tord, and Solveig Aas. "Demilitarization in Costa Rica: A Farewell to Arms?" *Journal of Peace Research* 18, no. 4 (1981): 333–51.

member country which comes under attack.[111] Costa Rica and Panama have been part of this agreement since 1948.

In the case of Costa Rica, the Rio Pact certainly facilitated their demilitarization and helps to explain the timing of this decision.[112] Figueres announced that the military would be abolished only two days before the Rio Pact was due to come into force.[113] A week later, Costa Rica's policy of demilitarization was tested when soldiers from Nicaragua invaded the country in an attempt to overthrow Figueres.[114] Costa Rica immediately filed a complaint to the OAS. The OAS investigated the situation, found that Nicaragua had no right to intervene, and helped the two countries reach a peace agreement.[115] When Nicaragua invaded Costa Rica again in 1955, Figueres turned to the OAS to pressure Nicaragua into signing a peace deal. Peace was restored and Costa Rica's territory and sovereignty remained intact.[116]

While the Rio Pact may appear to explain Costa Rica's demilitarization, it is not sufficient to explain the country's non-military status. None of the other OAS members abolished their militaries after joining the agreement. In 1948, 21 states belonged to the OAS, but only Costa Rica chose to dismantle its armed forces. This suggests that other factors particular to Costa Rica played a decisive role in demilitarization. The Rio Pact facilitated the abolition of Costa Rica's military by increasing the country's national security, but this factor alone cannot explain the country's demilitarization.

In the case of Panama, the Rio Pact did not contribute to the country's non-military status. By the time Panama demilitarized in 1990, the security clause in the Rio Pact was no longer

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[111] "Inter-American Treaty of Reciprocal Assistance." 1948. http://www.oas.org/juridico/english/treaties/b-29.html
[112] Hurrell, A. (1998), "Security in Latin America." *International Affairs*, 74: 529-546.
[113] Longley, *The Sparrow and the Hawk*.
[114] Høivik and Aas, "Demilitarization in Costa Rica," 338.
[115] Ibid., 333-351.
[116] D. K. M. K. “Costa Rica and the Invasion: Difficulties of a Central American Democracy.” *The World Today* 11, no. 3 (1955): 129–38.

effective.[117] Since the 1960s, the United States had conducted several military interventions in Latin America and the Caribbean, while meeting no collective military response from OAS members.[118] The US invaded the Dominican Republic in 1965, Grenada in 1983, and Panama in 1989. In each of these cases, Article 3 proved to be powerless. According to IR scholar Andrew Hurrell, by 1982 the OAS had no capacity to protect its members.[119] As such, the Rio Pact could not have facilitated the demilitarization of Panama by enhancing the security of the country.

Findings: Domestic-Level Theories

1) Some theories posit that regime type could influence a country's degree of militarization.[120] These theories observe that democratic countries spend less on their militaries than autocracies on average, and explain this phenomenon in several different ways.[121] Some scholars have argued that democracies spend less on their militaries because democratic leaders are more accountable to the broader public, and people generally want their governments to spend more on social services rather than the military. Another explanation for the military spending gap between democracies and dictatorships is that it is in the interest of dictators to maintain high levels of military spending.[122] Having a large military can help them maintain power, while compensating the military well can help secure their loyalty. Finally, another explanation is Democratic Peace Theory, which stipulates that democracies do not go to war with each other.[123] According to this theory, a democracy which is surrounded by other democracies may not need to maintain a military since the probability of being invaded or threatened by democratic neighbors would be very low.

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[117] Hurrel, "Security in Latin America," 529-546.
[118] Ibid.
[119] Ibid.
[120] Brauner, Jennifer. "Military Spending and Democracy." *Defence and Peace Economics* 26, no. 4 (2015): 409-423.
[121] Ibid.
[122] Ibid.
[123] Ibid.

At first, these regime type theories might appear promising for explaining why Costa Rica and Panama abolished their militaries. Regime type seems to be linked to demilitarization in some way, since all countries which do not have militaries are democracies. Not only are all these countries democratic, they are all very secure democracies which score highly on democracy indices. The average 'Global Freedom Score' of non-military nations on Freedom House is 88.5/100.[124] Most non-military nations (12 out of 20) have scores of 90 or more. Costa Rica and Panama have scores of 91 and 83 respectively. Even Nauru, which has the lowest global freedom score of non-military states, has a score of 77, making it comfortably democratic. These scores indicate that non-military countries are remarkably democratic, a fact which suggests that there may be a link between democracy and demilitarization.

However, one of the issues with these regime-type theories is that while they shed light on levels of military spending, they cannot explain why Costa Rica and Panama (or any other non-military state for that matter) *abolished* their militaries. Most democracies have armed forces. Even democracies with very small populations such as Luxembourg, San Marino, Estonia, Lithuania, and Latvia have opted to have militaries. As such, the fact that Costa Rica and Panama are democracies cannot explain why these countries demilitarized while other democracies did not. Democratic peace theory is not a compelling explanation either, since both Costa Rica and Panama were situated near dictatorships when they demilitarized. Costa Rica and Panama were both close to authoritarian regimes in countries such as Nicaragua, Cuba, and Guatemala.[125]

[124] Freedom House, Freedom in the World 2023 (Washington, DC: Freedom House, 2023) https://freedomhouse.org/sites/default/files/2023-03/FIW_World_2023_DigtalPDF.pdf.
[125] Freedom House, Freedom in the World 1989-1990 (Washington, DC: Freedom House, 1990). https://freedomhouse.org/sites/default/files/2020-02/Freedom_in_the_World_1989-1990_complete_book.pdf

2) The second potential domestic-level explanation for Costa Rica and Panama's demilitarization is that these countries had a pacifistic political culture when they abolished their militaries. According to political scientist Jürgen Winkler, a political culture is "a set of shared views and normative judgments held by a population regarding its political system."[126] If there was a broad understanding among the people of these countries that war is morally reprehensible, they may have wished to abolish the military, since this is the institution most closely associated with war. These normative judgments about how the state should be organized may have led individuals, civil society organizations, or political parties to campaign for demilitarization, putting pressure on the leaders of Costa Rica and Panama to abolish the military.

This explanation may appear particularly promising in the case of Costa Rica, since the country is famous for its pacifistic culture.[127] However, evidence indicates that pacifism only became a major part of Costa Rican culture after the abolition of the military in 1948. After 1948, Costa Ricans came to embrace the notion that they are an innately democratic, egalitarian, and peaceful people.[128] This myth was promoted by the Costa Rican education system, which taught Costa Ricans that the national character of Costa Rica has always been pacifistic.[129] The abolition of the military was presented as proof of the inherently pacifistic nature of Costa Ricans. However, this concept of an innately peaceful Costa Rican culture is not supported by historical evidence. Before the abolition of the military, Costa Rica had in fact experienced a

[126] Winkler, Jürgen. "Political Culture." Encyclopedia Britannica, 2018. https://www.britannica.com/topic/political-culture.
[127] Kordick, Carmen. *The Saints of Progress: A History of Coffee, Migration, and Costa Rican National Identity*. Tuscaloosa: University of Alabama Press, 2019.
[128] Kordick, *The Saints of Progress*.
[129] Ibid., 122.

bloody civil war, in which over 2000 people died in only 44 days.[130] Furthermore, in 1921, Costa Rica engaged in a war with one of its neighbors, Panama, over a minor territorial dispute.[131] Costa Rica also experienced two periods of military rule (1870-1882 and 1917-1919), as well as lengthy periods of heightened political violence, before its demilitarization in 1948.[132] While Costa Rica was more stable and peaceful than other countries in Latin America, the extent to which the country was pacifistic before 1948 has been greatly exaggerated.[133] The notion that a pacifistic political culture *led* to the abolition of the military in Costa Rica is therefore doubtful.

In the case of Panama, the pacifistic political culture explanation is not compelling. There is little evidence that Panamanians were particularly pacifistic compared to their Latin American counterparts.[134] Furthermore, since 1968, Panama had been dominated by military dictatorships, a fact which does not lend support to the notion that Panama had a pacifistic political culture.[135] It is therefore unlikely that a pacifistic political culture led to Panama's non-military status.

3) The final domestic-level theory is that Costa Rica and Panama's leaders abolished the military to secure their political power. According to this theory, Figueres and Endara needed to dismantle the armed forces to prevent military coups that could topple their new regimes.

In the case of Costa Rica, this theory is convincing. To understand why Figueres could not trust the Costa Rican military, it is necessary to consider how Figueres achieved power. Figueres became directly involved in Costa Rican politics after the ruling administration, led by Rafael Calderón, sent the police to arrest him during a live radio broadcast in 1942. Figueres had

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[130] While 2000 people may seem like a modest death toll, the small population of the country at the time (808,000) made the death toll very significant. Furthermore, most of these deaths were concentrated in a small geographical area where the fighting occurred, a fact which highlights the intensity of the violence. Ibid.
[131] Colby, "The United States and the Coto Dispute."
[132] Longley, *The Sparrow and the Hawk*.
[133] Kordick, *The Saints of Progress*.
[134] Guevara-Mann, Carlos. *Panamanian Militarism: A Historical Interpretation*. Athens: Ohio University Center for International Studies (1996).
[135] Guevara-Mann, *Panamanian Militarism: A Historical Interpretation*.

purchased airtime on the radio to criticize Calderón for inflicting violence on the Italian and German communities in Costa Rica. Figueres was exiled to Mexico, and from there decided that Calderón needed to be deposed.[136] Figueres began to stockpile weapons and equipment for a future insurgency. When Calderón's successor, Teodoro Picado, annulled the results of the 1948 election after a coalition of opposition parties won at the ballot box, Figueres and the opposition decided to launch an uprising, starting the Costa Rican Civil War.[137] With only 600 insurgents under his command, Figueres defeated Costa Rica's military and formed a temporary junta. After signing a deal with another opposition leader, Otilio Ulate, Figueres was allowed to rule the country for 18 months, from 1948-1949.[138] Shortly after assuming power, Figueres abolished the military.

Figueres could not trust the military to protect his regime for three reasons. Firstly, many of the soldiers in the Costa Rican military were sympathetic to his most dangerous political opponent, Calderón. After his defeat in the Costa Rican civil war, Calderón fled to Nicaragua, where he had the backing of dictator Anastasio Somoza.[139] With Calderón only a short distance from the border, Figueres recognized that Calderón could return at any moment in a bid to regain power. Figueres knew that he could not count on support from the military in such a scenario.[140]

Secondly, Figueres had just launched a violent insurgency against the military, a decision which led to the deaths of soldiers and revealed the incompetence of the Costa Rican military. Figueres' victory was humiliating for the armed forces. A politician with no prior military experience had led a small force to victory against an army of 1000 soldiers, 500 auxiliaries, and 3000 volunteers.[141] The officers who had been charged with protecting the country and the

[136] Longley, *The Sparrow and the Hawk*.
[137] Bell, John Patrick. *Crisis in Costa Rica: The 1948 Revolution*. Austin: University of Texas Press, 2021.
[138] Longley, *The Sparrow and the Hawk*.
[139] Bell, *Crisis in Costa Rica*.
[140] Longley, *The Sparrow and the Hawk*.
[141] Høivik and Aas, "Demilitarization in Costa Rica," 333-51.

capital of San Jose were revealed to be incompetent.[142] In this context of defeat and humiliation, the Costa Rican military could not be trusted to support Figueres.

The third reason Figueres could not trust the military was that military coups were commonplace in Latin America.[143] Even if Figueres had achieved power in different circumstances, trusting the military would have been unwise. In 1948, both of Costa Rica's neighbors (Nicaragua and Panama) were being ruled by military leaders who had seized power.[144] So long as the military remained in Costa Rica, the possibility of a military coup by an ambitious general or military officer would have been present.[145]

In the case of Panama, Endara also had strong political incentives to abolish the military. Panama had been ruled by the military since 1968, and Endara was one of the most prominent opponents of the military dictatorship during this period.[146] When Noriega was overthrown by the US invasion in 1989, Endara became the leader of Panama. Like Figueres, Endara could not trust the military. The military justifiably saw him as an opponent of militarization and knew that Endara would not promote their interests.[147] Considering the fact that the military had dominated Panama for over two decades before Endara's rise to power, Endara had good reason to fear that the military would return to power as soon as an opportunity presented itself.[148]

Figueres and Endara both had strong incentives to abolish the military, since doing so was necessary to safeguard their regime from military coups. However, it is worth noting that the presence of these political incentives could not have caused demilitarization on their own. To abolish the military, Figueres and Endara needed to be able to demilitarize without facing an

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[142] Ibid.
[143] Calvert, “Demilitarisation in Latin America," 31–43.
[144] Bell, *Crisis in Costa Rica*.
[145] Calvert, “Demilitarisation in Latin America," 31–43.
[146] Ropp, "Panama," 113-30.
[147] Ibid.
[148] Ibid.

immediate reprisal from the armed forces. If Figueres and Endara had tried to demilitarize while the military was in a strong position, disgruntled generals, officers, and soldiers would have likely attempted to overthrow the regime.[149]

Figueres and Endara each had a brief window of opportunity to safely abolish the military. In the case of Costa Rica, Figueres still had command of his militia, the National Army of Liberation, when he decided to abolish the military.[150] The Costa Rican armed forces had been severely weakened by their defeat in the civil war, making them incapable of challenging Figueres' decision to demilitarize.[151] Figueres also transferred his force of loyal volunteers into the newly-formed national police force, the Public Force of Costa Rica.[152] This decision gave Figueres the ability to swiftly counter the military in case it attempted to resist its dissolution.

For Endara, domestic political circumstances in 1990 gave him an opportunity to safely dismantle the military. The United States had just defeated the Panamanian army, rendering it weak and incapable of challenging its own dissolution. Even if the remnants of the Panamanian military had risen in revolt in response to the abolition of the military, Endara knew that he had the backing of the United States and could rely on its assistance to defeat a potential military uprising.[153]

In the cases of both Costa Rica and Panama, the theory that Figueres and Endara demilitarized because of political necessity and regime security is convincing. Furthermore, this theory helps explain the timing of the decision to demilitarize. Both Figueres and Endara found themselves in a situation where they needed to abolish the military to safeguard their political power. With Costa Rica and Panama's national security practically guaranteed by strong alliances

[149] Calvert, “Demilitarisation in Latin America," 31–43.
[150] Longley, *The Sparrow and the Hawk*.
[151] Ibid.
[152] Høivik and Aas, “Demilitarization in Costa Rica," 333–51.
[153] Ropp, "Panama," 113-30.

with the United States, Figueres and Endara could also abolish the military without fear of foreign invasions. This alignment of structural and domestic-level factors provided a rare window of opportunity that Costa Rica and Panama's leaders rushed to exploit.

Findings: Individual-Level Theories

This study examines one individual-level theory that could potentially explain the demilitarization of Costa Rica and Panama. According to this theory, the individual characteristics of Costa Rica and Panama's leaders were influential in the decisions to demilitarize. If other leaders had been in power instead of Figueres and Endara, the abolition of Costa Rica and Panama's militaries likely would not have happened.

Before applying this individual-level theory to the cases of Costa Rica and Panama, it is worth noting some methodological challenges. Determining whether a politician was motivated to make a decision by personal characteristics (such as their values, beliefs, or ideals) or external factors is difficult, for three reasons. Firstly, it is often impossible to know the motivations or beliefs of politicians with certainty.[154] Politicians have strong incentives to disguise their true beliefs, values, and motives to make themselves look as good as possible in front of the public.[155] For instance, a selfish and cynical politician may pose as a high-minded idealist. If this politician plays the part well enough, they may leave observers with the false impression that they acted according to deep beliefs and principles, rather than political self-interest. Secondly, politicians are subject to a host of cognitive biases such as the fundamental attribution error, loss aversion, preferences for simplicity and consistency, and susceptibility to strong emotional responses.[156]

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[154] Darren C. Treadway, Wayne A. Hochwarter, Charles J. Kacmar, and Gerald R. Ferris. "Political Will, Political Skill, and Political Behavior." *Journal of Organizational Behavior* 26, no. 3 (2005): 234-5.
[155] Treadway et al., "Political Will, Political Skill, and Political Behavior," 234-5.
[156] Stein, Janice. "Foreign policy decision-making: rational, psychological, and neurological models." In Smith, S. A., Amelia Hadfield, and Timothy Dunne, eds. *Foreign Policy: Theories, Actors, Cases*. 2nd ed. Oxford: Oxford University Press, 2012.

As a result, it can be difficult to determine whether a decision has been caused by cognitive biases or personal characteristics such as values, beliefs, or ideals. Thirdly, there is the issue of mixed motivations. Politicians may be motivated to make a decision by personal qualities such as their own values, beliefs, and ideals, while also feeling compelled to act by external circumstances. It is worth noting that political leaders are not just individuals, but individuals entrusted with responsibilities such as protecting the security and prosperity of their country. As such, they may face a conflict between the demands of their personal morality and political morality, which requires that leaders fulfill the expectations of their office.[157] In these cases, it can be difficult to determine whether individual characteristics, official expectations, external circumstances, or a combination of these factors caused a decision.

Despite these methodological difficulties, it is clear that this individual-level theory is not valid in the case of Costa Rica. The demilitarization of Costa Rica probably would have happened even if Figueres had not been in power.[158]

Figueres presented himself as a committed pacifist with a strong personal aversion to militarism, despite his role as the leader of an armed rebellion in 1948.[159] In public, he repeatedly told the story of how he realized that militaries were immoral and should be abolished. Figueres said that he moved to the United States to study at MIT in Boston during the 1920s but changed his mind about enrolling. Instead, he spent most of his time at the Boston Public Library, where he studied political theory, economics, and history.[160] During his studies, he developed a strong

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[157] Smith, Michael Joseph. *Realist Thought from Weber to Kissinger.* (Baton Rouge: Louisiana State University Press, 1986).
[158] Høivik and Aas, "Demilitarization in Costa Rica," 342.
[159] Longley, *The Sparrow and the Hawk*, 26-30.
[160] Longley, Kyle. “Resistance and Accommodation: The United States and the Nationalism of José Figueres, 1953–1957.” *Diplomatic History* 18, no. 1 (1994): 1–28.

and enduring interest in the English writer H. G. Wells and his book *The Outline of History*.[161] This work argued that militaries were not necessary and presented a fervent anti-militaristic stance. According to Figueres, H. G. Wells inspired him to abolish Costa Rica's military. In 1986, Figueres even delivered a speech praising H. G. Wells for his contribution to Costa Rican demilitarization, stating that the author "[...] discovered, for lack of a better term, that the military is not needed in a country."[162]

This oft-cited narrative misrepresents Figueres' role in demilitarization. The idea that Costa Rica should demilitarize did not come from Figueres, or H. G. Wells, but from members of the political party that Figueres belonged to. These party members saw the military as a political threat and an obstacle to Costa Rica's modernization. A few months before the outbreak of the Costa Rican civil war, the Social Democratic Party secretly issued a draft constitution which stated that the military should be abolished.[163] Figueres was not a member of the commission that wrote this draft constitution and was in fact notably more hawkish than his fellow party members. At this point, Figueres' primary ideological goal was not anti-militarism, but the liberation of Central American countries from dictatorships. His objective was to free Costa Rica from Calderón before using an army to topple dictatorships throughout Central America.[164] He let go of this goal shortly after the Costan Rican Civil War when he realized that liberating the rest of Central America was a lost cause.[165]

When Figueres temporarily took power in 1948, he changed his mind about demilitarization. No longer intent on leading an armed liberation campaign across Central America, Figueres had no incentive to keep a military in Costa Rica. In fact, as previously

[161] Revilla, Carlos. “Don Pepe y H. G. Wells.” Cambio Político. Cambio Político, December 1, 2020. https://cambiopolitico.com/don-pepe-y-h-g-wells/88288/.
[162] Revilla, “Don Pepe y H. G. Wells.”
[163] Høivik and Aas, "Demilitarization in Costa Rica," 342.
[164] Ibid., 333–51.
[165] Ibid.

discussed, Figueres needed to remove the military to secure his rule from a potential military coup. Figueres did not abolish the military because of his own personal commitment to pacifist ideals.[166] The idea of demilitarization, while radical at the time, had already been brought up by other party members as a potential political strategy. If other politicians had been in Figueres' position, they would have likely abolished the military as well. As such, Costa Rica's demilitarization cannot be explained by Figueres' individual characteristics.

The theory that personal characteristics led to demilitarization is also unconvincing in the case of Endara. As discussed previously, Endara had strong incentives to abolish the military and had an opportunity to safely rid his country of a politically threatening institution. Furthermore, Endara could observe the success of Costa Rica's demilitarization policy right across the Panamanian border.[167] The sensibility of dismantling Panama's military was evident to many foreign observers. In fact, in early 1990, the president of Costa Rica wrote an op-ed in the Tampa Bay Times which called for Panama to demilitarize.[168] Similarly, an op-ed in the New York Times pointed out that demilitarization would be a sensible policy for Endara.[169]

It is possible that Endara was motivated at least partly by idealism when he abolished the Panamanian military. Throughout his political career, Endara demonstrated a stubborn commitment to democratic and anti-militaristic ideals, and consistently opposed the military establishment which ruled Panama from 1968 to 1990.[170] He was arrested in 1971, forced into exile until 1977, and brutally beaten in 1989 after trouncing Noriega's preferred candidate in the

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[166] Ibid.
[167] Calvert, “Demilitarisation in Latin America," 31–43.
[168] Arias, Oscar. “Panama Ought to Abolish Its Army.” Tampa Bay Times. Tampa Bay Times, January 17, 2020. https://www.tampabay.com/archive/1990/01/10/panama-ought-to-abolish-its-army/.
[169] “Panama Needs No Army.” The New York Times. The New York Times, January 12, 1990. https://www.nytimes.com/1990/01/12/opinion/panama-needs-no-army.html.
[170] Martin, Douglas. “Guillermo Endara, Who Helped Lead Panama from Noriega to Democracy, Dies at 73.” The New York Times. The New York Times, September 30, 2009. https://www.nytimes.com/2009/09/30/world/americas/30endara.html.

presidential elections.[171] Despite threats and violence from the military regime, Endara remained committed to his anti-military stance. Considering his record as a stubborn and staunchly anti-military politician, Endara might have been motivated to demilitarize by his anti-militaristic views when he abolished the Panamanian military.

However, it is likely that most other politicians in Endara's situation would have made the same choice. Demilitarizing was not a radical policy in 1990 and any leader in Endara's predicament would have had strong incentives to dismantle the military while it was weak. As such, the individual-level theory that personal characteristics led to demilitarization cannot account for Panama's non-military status.

Section 5: Analysis of Findings

Summary of Findings

In the case of Costa Rica, two structural factors played an important role in demilitarization. Firstly, Costa Rica's decision to bandwagon with the regional hegemon, the United States, enhanced the state's national security. Secondly, their membership in the defense agreement known as the Rio Pact made it likely that other states would rush to their aid in the event of a foreign attack. Both of these structural factors ensured that Costa Rica could demilitarize without imperiling their national security. A domestic-level factor also played a crucial role. The leader of Costa Rica needed to abolish the military to secure his regime and had an opportunity to dismantle the military without facing reprisals, since the military had just been crushed in a civil war. The intersection of these structural and domestic factors led to demilitarization.

The causes of Panama's demilitarization were remarkably similar. A structural factor, bandwagoning with the United States, increased Panama's national security, allowing them to

[171] Martin, "Guillermo Endara."

demilitarize without becoming vulnerable to other states in the region. Meanwhile, a domestic-level factor, the need to maintain regime security, incentivized the leader of Panama to dismantle the military. The defeat of the military by US troops in Operation Just Cause ensured that they could not resist their dissolution. Again, an alignment of structural and domestic factors gave Panama's leader both the capacity and the incentives to dismantle the military, leading to demilitarization.

Contributions to Demilitarization Literature

The findings of this study contribute to the demilitarization literature by providing the most comprehensive explanations for the non-military status of Costa Rica and Panama. Previous accounts of Costa Rican and Panamanian demilitarization have been brief, partial, and limited, focusing on variables at a single level of analysis. These explanations have not considered the possibility that multiple factors at different levels of analysis interacted to produce demilitarization. Furthermore, these accounts have reached conflicting conclusions, leaving scholars without a clear sense of what caused demilitarization.

This study shows that the demilitarization of Costa Rica and Panama cannot be explained by domestic-level factors or international-level factors alone. While some works in the literature have already recognized that Costa Rica and Panama's leaders had incentives to dismantle the military, these works have not recognized the link between domestic political incentives and the favorable international situation of Costa Rica and Panama at the time of their demilitarization, which allowed these states to dismantle their militaries without fearing for their national security. This study contributes to the literature by clearly mapping the interplay between factors at the domestic and international levels.

This thesis also contributes to the literature on demilitarization by explaining the non-military status of both Costa Rica and Panama, allowing scholars to compare the factors that led to demilitarization in these two cases. My findings show that the causes of Costa Rica and Panama's demilitarization were remarkably similar. The military was a threat to the state's political leadership and a recent war had just rendered the military impotent, while strong relations with the United States ensured the state's security. The only substantial difference between Costa Rican and Panamanian demilitarization is the role of the Rio Pact in the case of Costa Rica. Costa Rica benefitted from the protection of this collective security pact while Panama did not. Nonetheless, the cases of Costa Rica and Panama feature far more similarities than differences.

An additional contribution of my findings is that they explicitly link the phenomenon of demilitarization to IR. So far, IR scholars have neglected the links between demilitarization and international relations, despite the relevance of demilitarization to understandings of how states interact and maintain their security in the international system. This study bridges the gap between these two subject areas and invites IR scholars to consider what demilitarization might reveal about state behavior in international relations.

Implications for IR Theory

The cases of Costa Rica and Panama's demilitarization demonstrate the importance of considering domestic-level factors, rather than focusing solely on structural or international considerations when explaining or understanding states' decisions about their national security. Many theories in IR dismiss domestic-level elements as unimportant, and instead seek to explain the behavior of states in terms of structural factors such as international anarchy or the balance of

power.[172] While disregarding domestic-level considerations is often necessary to increase the parsimony of a theory, relying on theories which only consider structural factors can lead to an incomplete understanding of certain state behaviors. For instance, Costa Rica and Panama's non-military status was made possible by international factors such as their alliances with the United States, but it was the domestic-level political context of their ruling regimes that gave them both the incentives and the capacity to demilitarize. Focusing solely on international factors would not provide a complete understanding of why Costa Rica and Panama dismantled their militaries. It is necessary to recognize how elements at different levels of analysis combined to produce demilitarization.

Costa Rica and Panama's demilitarization may also highlight some of the weaknesses of structural realist theories which assume that states are power or security maximizers. The theories of scholars such as Waltz and Mearsheimer, which posit that states are primarily motivated by the need to maximize their chances of survival in an anarchic international system, neglect the crucial variable of regime security. Costa Rica and Panama appear to have decided that the benefits of not having a military outweighed the potential national security costs, indicating that security from foreign powers was not their priority. While they had strong alliances with the United States, they would have had slightly more national security if they had maintained a military 'just in case'. Alliances sometimes break down unexpectedly and the possibility of war can never be dismissed entirely, given that other state's intentions can evolve. The reason Costa Rica and Panama chose not to maximize their national security is that their ruling regimes needed to secure their domestic political power. The ruling regimes of Costa Rica and Panama were trying to maximize their regime security, not their national security. This

[172] Lechner, "Anarchy in International Relations."

crucial distinction cannot be captured by structural realist theories which ignore the role of domestic factors.

The analysis in this study may also help explain why demilitarization is so rare among countries with substantial populations and economies. In the cases of Costa Rica and Panama, a combination of several factors was necessary to enable and incentivize demilitarization. For instance, the regime had to feel sufficiently threatened to decide that demilitarization was necessary, and the military needed to be too weak to resist their dissolution. While regimes in politically unstable countries often feel endangered by the possibility of a military coup, they are rarely in a position where they can dismantle the entire military safely. Only in rare instances, such as the overwhelming defeat of the military in a civil war or a foreign invasion, can such a policy be enacted without substantial risks to the regime.[173] Even if both features are present, the regime will likely need to increase its national security, for instance by forming a strong alliance with a powerful state. Considering all these necessary conditions for demilitarization, one can understand why the policy is implemented so rarely among states that can afford to support a substantial military.

Future Research Directions

Further research on non-military states is necessary. Over 10% of states have no military, a fact which indicates that demilitarization is a significant phenomenon in international relations and political science more generally. Despite the prevalence of demilitarization, academic works on this subject have been scarce. There is practically no dialogue between scholars on the topic of why some states choose to dismantle their armed forces. Existing explanations of why certain

[173] Nordlinger, Eric. "Soldiers in Politics: Military Coups and Governments. Englewood Cliffs, N.J.: Prentice-Hall, 1977.

states have demilitarized have been brief, partial, and limited. As such, there are plentiful opportunities to deepen our understanding of demilitarization.

This thesis has only explained the demilitarization of two cases, Costa Rica and Panama. While these cases are the most puzzling due to their relatively high populations and GDPs, the demilitarization of 18 other states remains unexplained. The non-military status of these countries has received hardly any attention in the academic literature. It would be worth explaining, for instance, why these small states in particular chose not to possess militaries, when other small states such as San Marino and Liechtenstein have their own armed forces. Why do some small states choose to possess militaries while others do not?

One possibility would be to apply the same eclectic levels of analysis framework to all the other non-military states, so that the causes of demilitarization can be compared among the twenty cases of demilitarized countries. This approach would reveal whether there are any regional patterns in demilitarization. For instance, why are so many of the non-military states in Oceania and the Caribbean? Are there any links between the geography of islands and demilitarization? What about remoteness and the number of land borders? It would be worth considering whether there is a link between these factors and demilitarization.

Understanding the causes of the non-military status of all demilitarized states could also help explain why all non-militarized countries are democracies. Considering that all demilitarized countries are democratic, and that most of these non-military countries have exceptionally high scores on democracy indices, it seems unlikely that the association between demilitarization and democracy is coincidental. How exactly is democracy linked to demilitarization? Does democracy contribute to demilitarization or does demilitarization contribute to democracy, or do both of these factors mutually reinforce each other? Explaining

the causes of the non-military status of all twenty cases would provide a useful start for answering these questions.

Another useful research direction would be assessing historical cases of demilitarization. As of 2024 there are twenty cases of states which have chosen not to possess militaries, but there are also cases of states which chose to demilitarize in the past before reversing their decision later. For instance, Haiti disbanded its military in 1995 before restoring its armed forces in 2017. Panama also demilitarized initially in 1904 before its police forces gradually morphed into a military during the middle of the twentieth century. Why did these cases of demilitarization occur and why was their non-military status not sustained? Developing a better understanding of historical cases would also help scholars assess whether there are any patterns of demilitarization over time. When have most cases of demilitarization occurred and why? Are there any specific historical moments in international relations, such as WWII, decolonization, or the end of the Cold War, which are correlated with a particularly high frequency of demilitarization? Assessing historical cases in addition to the twenty current cases of non-military states would allow scholars to check whether there are any temporal patterns of demilitarization.

Finally, researchers could examine what demilitarized states reveal about sovereignty in international relations. The fact that many states have maintained their sovereignty while lacking militaries to defend themselves is remarkable and merits further attention. The survival of these demilitarized states suggests that predation is less common in IR than one might expect. Scholars could study what sort of legal and normative environments have enabled so many small, defenseless states to survive and maintain their sovereignty.

Conclusion

Costa Rica and Panama's decision to abolish their militaries is puzzling. Of the twenty states that do not have armed forces, they are by far the most capable of supporting a substantial military. A combination of structural and domestic-level factors can explain why Costa Rica and Panama demilitarized. The ruling regimes of both countries needed to abolish the armed forces to secure their power and had a chance to dismantle the military while it was too weak to retaliate. Meanwhile, their close ties with the hegemonic power in the region, the United States, greatly reduced the risks of demilitarizing, and a defense agreement (the Rio Pact) enhanced Costa Rica's security. This alignment of structural and domestic factors provided a brief window of opportunity for demilitarization that Costa Rica and Panama's leaders seized. The theory that the individual characteristics of Costa Rica and Panama's leaders were influential in the decisions to demilitarize was not convincing.

These findings could be strengthened by further research. For instance, why do countries persist with demilitarization even when the factors that led to the abolition of the military (such as the domestic political context) are no longer present? Why do so few states renege on their non-military status once they have abolished their military? The subject of demilitarization has not been adequately addressed by the literature. Explaining why states abolish their military, and sustain this decision, would enhance our understanding of demilitarization and its role in international relations.

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