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PhD School of Military Sciences

From a Colonial Army to the Modern Professional Armed Forces of Peace
Support Operations

The Role and Position of the Armed Forces in Crucial Periods of the 20th Century
History of Spain

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An outline of the scientific problem

Since the early 1990s the so called “Spanish model” has been frequently referred to in connection with the political transition but there has been no information whatsoever on the “opinion” and behaviour of the armed forces. However, in the history of Spain the officer corps has always played a significant role in policy making. To this end I considered it important to examine what role the Spanish military played at the time of transition, and also its relations to changes and political events. This was the theme of my university doctoral dissertation defended in 1996. However, as early as the time of research on this era and theme the need for a further analysis of the processes and many minor details before and after the analysed era soon became clear. Therefore, I analysed the development of the set of problems from the military disaster of 1898. This retrospection allowed me to disclose some very important factors behind and obstacles to the changes.

Focusing / enlarging the research theme

On the basis of my knowledge at the time of planning my research I considered I had to thoroughly study the

- Spanish – American War over Cuba of 1898 (as the problems for the 1898 generation);
- Spanish war in Morocco;
- Process of NATO accession of Spain;
- Series of military reforms in Spain.

As I progressed with the collection of materials an increasing number of questions emerged relating to the interrelations and root causes of various facts. Consequently the theme continued to grow instead of becoming more focused.

Nevertheless, the processing of such a very long period of time was necessary because several of its elements are tightly intertwining and the range of root causes of present are rather wide. At the same time I tried to focus on my central issue – the role of Spanish military and officer corps in the 20th Century history of Spain – without getting lost in the details of particular events analysed in the chapters of my

dissertation or in the rather contradictory special literature (for example on the Spanish Civil War).

From the analysed special literature I focused primarily on Spanish – mainly published – historical, political, and military scientific sources (Laws, Acts, official documents, memoirs, military specific and daily press, and interviews), and also on studies published in contemporary Hungarian diplomatic sources (archived foreign affairs materials) and military special literature. The latter allowed me to examine the Spanish Civil War from a new aspect – that of new features of tactics and military technology. Due to the limited size the more detailed versions of a few chapters had been published in the framework of separate studies during the research phase thus I could refer to the conclusions made in them.

The **structure of the dissertation** follows fundamentally chronology but several parallel or interrelated or repeatedly appearing themes (such as the issues of Gibraltar or Morocco) necessitate the inclusion of thematic chapters as well.

Objectives of research

I wished to analyse the century-long development process of the Spanish armed forces, from the outdated, backward, ill-equipped military conducting colonial wars and involved in internal law-enforcement functions that is from the very end of the 19th Century to the early 21st Century, to the shaping of the current, fully professional military playing an increasingly important role in international initiatives and acting in accord with society.

My aim has been to disclose the role played by the Spanish military in the 20th Century history of Spain on the basis of Spanish special military literature and press, documents, military doctrines and manuals, decrees as primary sources, mainly Spanish and Hungarian political science literature, Spanish-language analyses and memoirs related to the theme, and contemporary Hungarian diplomatic sources and military specific literature. I wish to analyse the relation of the military to the politics and society in crucial periods of the history of Spain.

I wish to disclose the changes in Spanish national defence, security, and military doctrines in different historical and political situations and in close connection with this the role Spain plays in the initiatives of NATO, UN, or the European Union. In order to explore the stages of this process

- I analysed the causes of the defeat of the Spanish colonial armed forces from both military and political aspects with special regard to the Spanish – American War resulting in the loss of the last overseas colony – Cuba – (see Chapter 1). I presented the shaping of Spanish-Moroccan relations, the military-professional causes of the unsuccessful pacification operations, then the period of Protectorate (see Chapter 2).
- I examined the general military-professional features of the Spanish Civil War with special regard to the composition of the military, the role of its officer corps, the leadership of troops, and military technology matters.
- Among the military aspects of the Franco regime I analysed the issue of Spain's neutrality during World War II; the interrelations between the ambitions of Spanish foreign policy and World War II (see Chapter III.1); Spain's response to the Hungarian Revolution of 1956 (Chapter III.2); and the situation of the armed forces and that of the officer corps (Chapter III.3).
- I disclosed the relation between Spanish society and armed forces in various eras within the frameworks of political regimes (in every chapter and especially in Chapter IV).
- I summarised the shaping of Spanish security and defence basic principles including the Spanish-American Treaty and the process of Spain's NATO accession (Chapter V).
- I overviewed the process of modernisation and reorganisation of the Spanish armed forces from the military based on – redeemable – compulsory military service to the introduction of all-voluntary armed forces (Chapter VI).
- I present the increasing involvement of the Spanish armed forces in international organisations, initiatives, and in multinational humanitarian and peacekeeping missions.

These stages helped me with drawing a picture of the **century-long chain of commitments of the Spanish armed forces**:

- In the 19th Century through a series of coups d'états the military intervened into policy making;
- At the turn of the 19th – 20th Centuries a series of defeats suffered in the colonies;

- The military was a scapegoat but at the same time it was given a law enforcement function;
- During the Franco regime the armed forces were presumed to have power but in fact they were neglected and allowed to erode and decay;
- Society was afraid of the military as a legacy of the Franco era even during the time of political democratisation;
- Military service is not popular with young people;
- Therefore there is a tendency to use the armed forces in
 - Peace Support and humanitarian missions, and
 - Internal disaster relief and civil defence missions thus to improve their general image.

In Spanish security and defence policy documents one can frequently read comments like “we wish to take a position in the world, which is in concert with our weight and importance”. The disclosed historical and political stages allow outlining the following development process on Spain’s self-assessment and position in the world:

- It used to be a naval great power made an empire by the great geographic explorations: both Central and South Americas poured their treasures to the parent state. However the enormous colonial empire started to shrink in the early 19th Century and by 1898 Spain had lost all of its overseas colonies.
- The *Armada Invencible* suffered terrible losses thus Spain lost its sea power too.
- Medieval Spain did not participate in the repartition of the world in the early 20th Century – the neocolonization – but it remained a “small-nation existence with a great power self esteem” although it was unable to intervene in the global status quo.
- The economic development of Spain slowed down (the treasures from America were wasted on wars, Arabs and Jews were expelled from the country, it was impossible to get renewed under the pressure of latifundiums and the Church).
- In the early 20th Century Spain was regarded as an old colonizer in a new world.
- Today Spain is a middle power and this status can be consolidated through its armed forces participating in multinational missions. The country tries to

play an increasingly important role in international politics. In this field its traditional cultural links to the Arab World and South America prove very useful. As a southern gateway to Europe and a country open toward the Atlantic Ocean it plays the role of a bridgehead to North Africa and the other coast of the Atlantic.

Research techniques

The sources, books, documents, studies, and international analyses were processed fundamentally with the use of historical techniques: the relations between society, politics, officer corps, and armed forces were examined through historical, political- military- and technology-history methods.

During the processing of special literature, essays, diplomatic sources, historical and military memoirs accessible in archives, libraries, and on the internet I used the method of analysis, comparing opinions, synthesis and deduction.

I disclosed sources unpublished or not analysed in the special literature on the above theme. When using the comparative method I regarded it important to consult internationally acknowledged researchers of my field of interest and to discuss my hypothesis with them. I also made interviews with persons who had held important positions during the analysed period or had decisive influence on certain events, thus increasing the accuracy of the analysis.

As it follows from the nature of the theme the previously gathered special literature in libraries and archives was processed through analytical methods then the collected data were analysed and synthesised.

During my research activities certain parts of my findings and partial results were published.

SUMMARISED CONCLUSIONS

In the first half of the 20th Century the failures of the underdeveloped and ill-equipped Spanish armed forces conducting colonial wars can be explained with military-professional causes as both society and politics played significant role in the disasters. By the late 19th Century colonizer Spain, one of the medieval great powers had already lost its last overseas colonies (the Philippines, Puerto Rico, and Cuba) and stayed out of the repartition of the world in the early 20th Century. Through holding Morocco Spain was able to maintain some of its past greatness. The war in

Morocco also provided the too large officer corps and armed forces with work and a sense of importance.

As opposed to my previous supposition during the Franco regime

- due to political priorities of other trends and the economic hardships there were no significant reforms in the armed forces;
- in spite of the military-professional experience gained in the Spanish Civil War, and the new devices, technologies and tactics there were no modernisation or technological changes in the military;
- in spite of the leading positions held by top military leadership both in the government and economic life the armed forces were not provided with sufficient support for their development.

After the death of General Franco the significant changes in Spanish society (political democratisation and economic modernisation) were coupled with important changes within the armed forces too (reforms and modernisation). As a result of political decisions and the development of social relations the military gradually found its real place in society and was prepared for real defence missions instead of colonial wars and internal law-enforcement functions.

The attempted coup d'état heralded the end of an era and since that time the armed forces have not presented an independent political force therefore ceased to present a threat to democratic society. The (re)integration of soldiers and officers into society accelerated. The introduction of democratic European norms had its impact on the military as well. Through the acceptance of civil control, political independence, obedience to current political will, etc. the fear of the responses from the armed forces and of a possibility of their intervention into politics within society gradually decreased.

New requirements towards the armed forces, activities in multinational environment, the consensus between political parties in the field of national defence and security policy issues had a positive influence on the relations between the military and civil society and control.

After a long state of exclusion Spain and its armed forces became members of several international and supranational organisations (NATO, EU) thus the country returned to the international arena. The international commitment of the Spanish armed forces and the multinational environment accelerated the transformation of the

Spanish military. As an important tool of Spanish foreign policy the military became an important factor again. The development of the armed forces, reforms, and the trends of modernisation were identified by a Spanish security and defence policy gradually taking shape and also taking into consideration the above mentioned important tasks. Key words for the transformation of the armed forces are in close connection with the requirements of new tasks: smaller, better equipped, mobile, modular armed forces are necessary for crisis prevention, crisis management, and also for administrative missions. Military reforms and development can be planned and executed with the use of resources at disposal (budget) and in concert with the expectations and commitment of society.

Analysing the relations between the armed forces and society it should be acknowledged that military service is not popular with young people. In accordance with this tendency a new recruitment, retainment, and reconversion policy should be elaborated. Defence awareness and the importance of defence culture should be encouraged and strengthened among the population. It should also be emphasised that national defence is a common case.

An important aspect of Spanish security and defence policy is the fact that as a Southern gateway to Europe Spain is directly involved in the issue of North African migration and terrorism. Due to its traditional cultural links to the Arab World and good relations with Latin America it plays the role of a European bridgehead to North Africa and the other coast of the Atlantic.

The participation in Peace Support Operations and humanitarian missions increases both the international prestige of Spain and the acceptance and respect of the military by its own citizens. However, not only in national defence and common defence tasks the armed forces should participate but also in disaster relief in the case of industrial or natural catastrophes – as determined by the Spanish government as a new type of mission.

NEW SCIENTIFIC FINDINGS

- 1) In the field of military science my attempt was the first to prove with the help of scientific methods that political decisions also played a decisive role in the defeats of the outdated, backward, and ill-equipped Spanish colonial army in Cuba and Morocco. I found important evidences underpinning my hypothesis that those disasters were caused by fundamentally wrong political and military decisions.
- 2) A new result of research is that in Hungary I managed to present important events through the analyses and assessments of these events by players themselves (Admiral Cervera, Moroccan military leadership, the forbidden works by UMD, interviews, statements, and memoirs of ministers).
- 3) On the basis of my research I proved that in spite of the new means, technologies, and tactics tested and used during the Spanish Civil in real conditions due to political and economic hardships there were no significant reforms, modernisation or technological changes in the armed forces during the Franco regime. In spite of the leading positions of top military leadership both in the government and economic life the armed forces as an institution were not provided with sufficient support for their development. I also presented that during the Franco regime no political decisions underpinned the transformation of the armed forces, moreover, they rather impeded the initiators of reforms.
- 4) On the basis of previously unknown archived Hungarian sources and special literature in Spanish and Hungarian languages I managed to first prove the changes within the armed forces parallel with the large-scale changes in Spanish society, which took place after the death of General Franco. Through the analyses of Spanish national defence doctrines and directives I proved that the military is able to meet new requirements if there is a consensus between political parties on national defence and security policy issues and it can rely on the efficient and firm support of society.
- 5) Through a comprehensive presentation on the international commitments of the Spanish military I was the first in Hungary to prove that the armed forces of Spain managed to catch up with the standards of professional European armed forces and became an important tool of Spanish foreign policy as an active player in international initiatives. I also showed that when politicians realised that the geostrategic position of Spain had increased again and their country

became an important allied state it underpinned the development and modernisation of the armed forces. To a certain extent the experience gained from the transformation of the Spanish military may serve as a model for the further modernisation of the Hungarian Defence Forces, shaping the professional Hungarian armed forces, and the more efficient deployment of personnel in missions.

Some practical ways of use of research findings

Facts and information disclosed during the research allow to know the role the Spanish armed forces and their officer corps played in history. These findings also help with a better understanding of the root causes and sometimes even the significance of many current political decisions.

Security and defence policy issues disclosed and analysed during the research are related to

- current Hungarian military-political issues;
- international security and defence policy issues

thus allowing to draw conclusions valid up to date.

For the leaders and experts of the Hungarian Defence Forces in transition the research findings can prove useful in connection with

- the NATO accession of Spain;
- Spanish participation in international missions;
- establishment of civil control, and
- experience gained in the field of recruitment, retainment, and reintegration policies aimed at personnel of a professional military.

The security and defence policy courses conducted at the National Defence University provide interesting additional information and assistance with comparing different doctrines and basic principles. The themes discussed in the dissertation provide and insight into a period of the history of Spain, relatively neglected and treated and taught only at a general level, for students of faculties of Arts majoring primarily in Hispanic studies.