Decentralised Activation, Not Coordinated Campaign

What the CJNG Response to El Mencho's Death Reveals About Cartel Organisational Capacity

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THE QUESTION

On 22 February 2026, Mexican security forces killed Nemesio Oseguera Cervantes (*El Mencho*), founder and leader of the Jalisco New Generation Cartel (CJNG). Within hours, over 370 violent incidents erupted across 25 states: narco-blockades, arson attacks on OXXO stores and *Bancos del Bienestar*, and direct ambushes of Guardia Nacional units that killed at least 25 officers. Some observers warned of an impending nationwide insurgency. **The data tell a more qualified story.**

WHAT THE DATA SHOW

Using two independent georeferenced incident datasets — DataInt (251 records) and Aliado/Alephri (138 records), merged and deduplicated to 370 events — we mapped the timing, geography, and severity of every incident and asked whether the pattern looks like a coordinated national campaign or something else entirely.

Finding 1 (see Panel A) — Three types of response, not one national doctrine

The clearest signal in the data is how much behaviour varied by region. Panel A shows the distribution of activation times for each cell type. In CJNG's core states — Jalisco, Zacatecas, Guanajuato — cells launched armed confrontations and ambushes of security forces **within two hours** of El Mencho's death: organisations with standing orders, weapons on hand, and a pre-existing territorial presence. Along major federal highways in Tamaulipas, Baja California, and Veracruz, a second type of cell activated at similar speed but focused exclusively on blocking and burning vehicles — logistically simpler, lower risk, lower severity. A third type — commercial terror: OXXO arson, bank intimidation — did not peak until **15 to 18 hours** after the killing, most heavily in Mexico City, Chiapas, and Oaxaca. That late wave is the strongest evidence of opportunism: local commanders watching events unfold nationally and deciding to act on their own initiative, not because they received orders.

Finding 2 (see Panel B) — Where cells struck reflects where they lived, not strategic calculation

Panel B maps each region by two dimensions: how severe the violence was, and how much damage it did to the national road network. The armed core-territory cells (red bubbles, upper right) inflicted the most harm on both counts — but only because Jalisco and Zacatecas are precisely where CJNG is strongest. The commercial-terror cells (green bubbles, lower left) generated many incidents but caused minimal disruption to road connectivity: burning an OXXO in Mexico City does not close a federal highway. Highway-denial cells (grey bubbles, upper centre) achieved moderate network disruption but relatively low severity. The picture that emerges is one of **cells doing what they were already capable of doing in the places where they already operated**, not a coherent national strategy assigning different roles to different units.

Finding 3 (see Panel C) — A broadcast signal, not a command chain

Panel C tests whether the violence spread progressively across space over time — which is how a functioning military hierarchy would look — or whether it erupted simultaneously in multiple places at once. Each bar shows how tightly incidents cluster together in space within a given time window. In the first two hours, clustering is high and meaningful (red bars). By the six-hour mark, it has dropped to background noise (grey bars). In a genuine diffusion process — orders travelling down a chain of command — that clustering would decay *gradually*. The sharp drop-off instead points to a **pre-programmed broadcast**: a single activation signal sent to all cells simultaneously, each of which then acted independently. The violence looks coordinated in time but was decentralised in execution. This is a franchise activating its local branches, not an army receiving orders from a general.

Finding 4 (see Panel D) — The road blockades were not placed where they would hurt most

Panel D presents a counterfactual: if CJNG had placed its 194 highway blockades at the most strategically important junctions of the federal road network — the nodes whose closure would do maximum damage to national logistics — how much worse could things have been? The red curve shows that optimal counterfactual sequence; the dashed grey curve shows what actually happened. The organisation achieved roughly 70% of the damage that a perfectly-planned disruption would have produced, which is notable. But the gap between the two curves is not explained by poor planning. The three most valuable nodes that were *not* blocked — Culiacán, Los Mochis, and Navojoa, all on Highway 15 along the Pacific spine — sit squarely in Sinaloa Cartel territory (shaded in gold). **CJNG did not fail to identify the optimal choke points; it was territorially excluded from them by its principal rival.** The boundary of CJNG's violence is drawn by inter-cartel geography, not by the presence of the state.

POLICY IMPLICATIONS

CJNG is powerful but bounded — and the boundary is territorial, not military. The organisation demonstrated the capacity to activate dozens of cells in 25 states within two hours of its leader's death. That is a genuine capability that should not be minimised. But the pattern of violence reveals an organisational architecture closer to a *franchise* than an *army*: cells hold local territory with local violence, connected by a broadcast signal, without meaningful cross-regional coordination once activated.

• **Succession risk is local, not national.** The danger in coming months is not a nationally-coordinated CJNG offensive but fragmentation into autonomous factions competing over Jalisco and the Pacific corridor — a pattern that historically produces *more* homicides, not a unified insurgency.

• **The state's operational capacity is real.** El Mencho's killing shows the army and Guardia Nacional have effective reach when they choose to use it. The more consequential question is political: cartel durability derives less from military parity than from political protection at all levels of government.

• **Targeted protection of key road corridors is feasible.** The counterfactual analysis shows that three highway junctions — Culiacán, Guadalajara, and Mexico City — account for a disproportionate share of national connectivity. Rapid deployment to secure these nodes during a future crisis limits economic damage far more efficiently than a dispersed response.
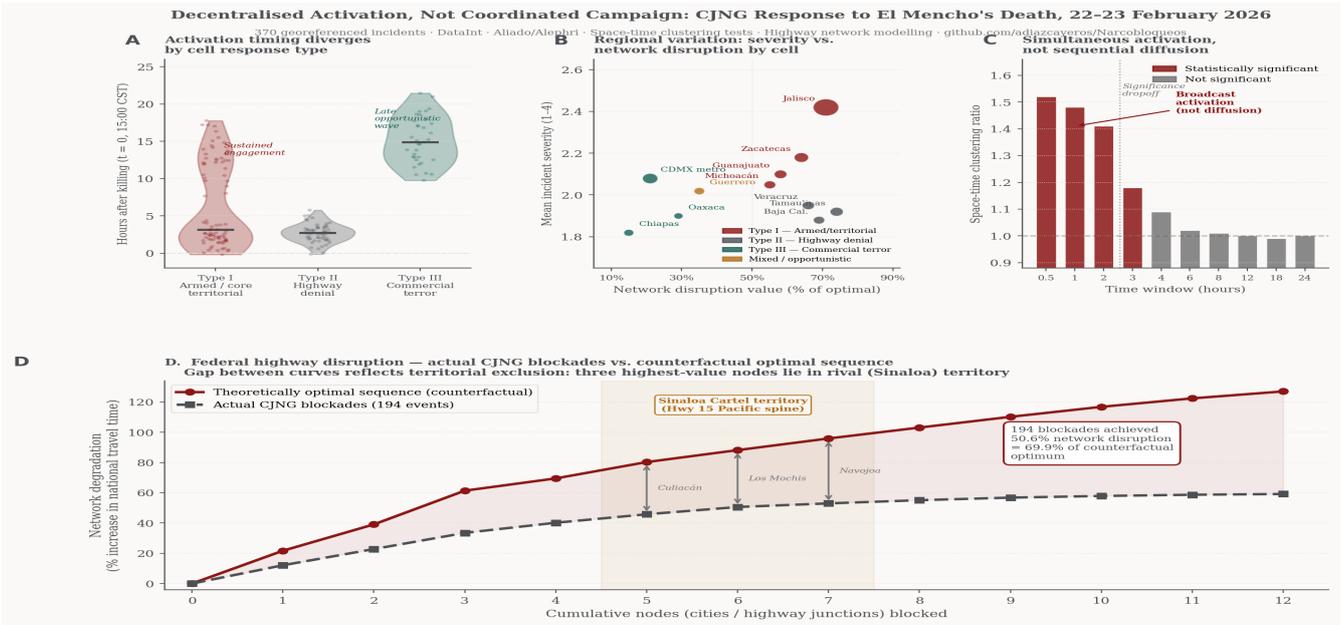
Spatial Evidence and Context

Decentralised Activation, Not Coordinated Campaign: CJNG Response to El Mencho's Death, 22–23 February 2026

370 georeferenced incidents · DataInt · Aliado/Alephri · Space-time clustering tests · Highway network modelling · github.com/adiazcayeros/Narcobloqueos

A. Activation timing diverges by cell response type

B. Regional variation: severity vs. network disruption by cell

C. Simultaneous activation, not sequential diffusion

D. Federal highway disruption — actual CJNG blockades vs. counterfactual optimal sequence
Gap between curves reflects territorial exclusion: three highest-value nodes lie in rival (Sinaloa) territory

Figure 1. (A) Activation timing by cell type — armed-core cells engaged within 2 h; commercial-terror peaked 15–18 h after the killing, consistent with opportunistic late activation. (B) Severity vs. road-network disruption by region: armed-core cells (red) cluster in the high-severity, high-disruption quadrant; commercial-terror cells (green) generated many incidents but minimal road disruption. (C) Space-time clustering collapses sharply after 2 h — broadcast activation signature, not sequential diffusion. (D) Counterfactual: CJNG achieved 69.9% of optimal disruption; gap explained by territorial exclusion from Sinaloa Cartel zone (gold band, Highway 15 Pacific spine).
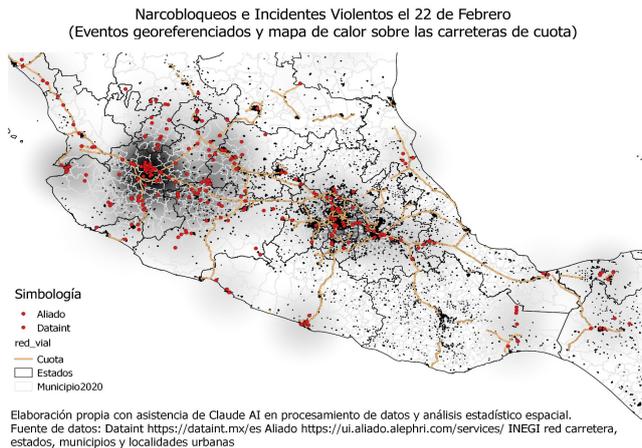
Map 1. Georeferenced narco-blockades and violent incidents, 22 February 2026. Red dots: DataInt and Aliado events. Heat map: incident density. Gold lines: toll-road network. The concentration along the Jalisco-Bajío-CDMX corridor and the relative absence across the Pacific north reflect the territorial limits of CJNG documented in the analysis above. Own elaboration with Claude AI assistance · Sources: DataInt, Aliado/Alephri, INEGI.

Undercount: OXXO Stores and Bancos del Bienestar

The georeferenced dataset captures **12 mapped attacks on OXXO stores** and **12 Banco del Bienestar branches**. Yet FEMSA publicly reported more than **200 of its stores** attacked, and the federal government acknowledged more than **50 bank branches** targeted. This gap has two complementary explanations. First, commercial attacks are harder to geolocate in real time than road blockades, which are visible from satellite imagery and reported immediately by stranded drivers. Second, both DataInt and Aliado prioritise events with direct impact on road mobility. The map should therefore be read as a radiograph of CJNG's territorial deployment and presence along the highway network — not as a comprehensive census of the total economic damage caused on 22 February.

Guardia Nacional Casualties: Putting the Numbers in Context

At least **25 Guardia Nacional officers** were killed in the 24 hours following El Mencho's death. It is important to note that the vast majority died in **ambushes and direct attacks on checkpoints across multiple states**, and were *not* casualties of the capture-and-kill operation in Tapalpa, Jalisco, where El Mencho himself was eliminated. This distinction matters analytically: those deaths reflect the pre-existing lethal capacity of local CJNG cells activated by the broadcast signal, not a coordinated military counteroffensive ordered from above. The death toll is a sobering indicator of how dangerous CJNG remains in its own territories — but it does not constitute evidence of the kind of national military projection that an insurgency would require.