Stanford | Democracy Action Lab
Center on Democracy, Development and the Rule of Law

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Decentralised Activation, Not Coordinated Campaign

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

This Brief was prepared by Alberto Díaz-Cayeros (Stanford University) who supervised, prompted and corrected the analytic work carried out by Claude AI — Anthropic (analytical co-author). Full replication code and data available at: **https://github.com/adiazcayeros/Narcobloqueos**

THE QUESTION

On 22 February 2026, Mexican security forces neutralized and killed Nemesio Oseguera Cervantes (*El Mencho*), founder and leader of the Cartel Jalisco Nueva Generación (CJNG). Within hours, more than 370 violent incidents erupted in 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 compared the violence with a nationwide civil war insurgency. **The data and its analysis tell a more qualified story.**

WHAT THE DATA SUGGEST

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 reported incident and asked whether the pattern looks like a coordinated national campaign or something else entirely.

Finding 1 (see Panel A) — Three types of responses, 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. A second type of cell deployed along major federal highways in Tamaulipas, Baja California, and Veracruz, 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 the periphery of 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 criminal cells struck reflects where they lived or operated, not a 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 a given 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 (although note the caveat in the box below regarding attacks on the National Guard).

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

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 traveling down a chain of command — that clustering would decay *gradually*. The sharp drop-off instead points probably to a **pre-programmed broadcast**: a single activation signal sent to all cells simultaneously, each of which then may have acted independently or as copycats of other cells. The violence appears coordinated in time at first, but then was highly decentralized in execution. This is characteristic of a franchise activating its local branches, not of an army receiving orders from a command and control center.

Finding 4 (see Panel D) — The road blockades were not placed where they would hurt highway circulation the 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 organization achieved roughly 70% of the damage that a perfectly-planned disruption would have produced, which is indeed notable. The gap between the two curves is primarily explained by competition with other criminal organizations. 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). **Nonetheless CJNG did not identify the optimal choke points; it often placed them probably in territories where there was an active cell.** The boundary of CJNG's violence is drawn by inter-cartel geography, and the opportunity of roads available close by.

POLICY IMPLICATIONS

CJNG is powerful but bounded — and the boundary is territorial, not military. The organization 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 minimized. But the pattern of violence reveals an organizational 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 that the army and the Guardia Nacional have effective reach when they choose to use it. The more consequential question is hence political: cartel durability derives probably less from military parity than from political protection at many levels of government.
- **Targeted protection of key road corridors is feasible.** The counterfactual analysis shows that some highway junctions account for a disproportionate share of national connectivity. Rapid deployment to secure these nodes during a future crisis would limits economic damage far more efficiently than a dispersed response.

Data: DataInt public events map (251 records); Aliado/Alephri neuralgic alerts (138 records); de-duplicated to 370 events. **Methods:** Space-time clustering tests; spatial autocorrelation analysis; federal highway network modeling and counterfactual disruption simulation. **Limitations:** Both platforms are likely to capture 20–65% of events by category; Jalisco is systematically undercounted. Full replication code and data: `https://github.com/adiazcayeros/Narcobloqueos`

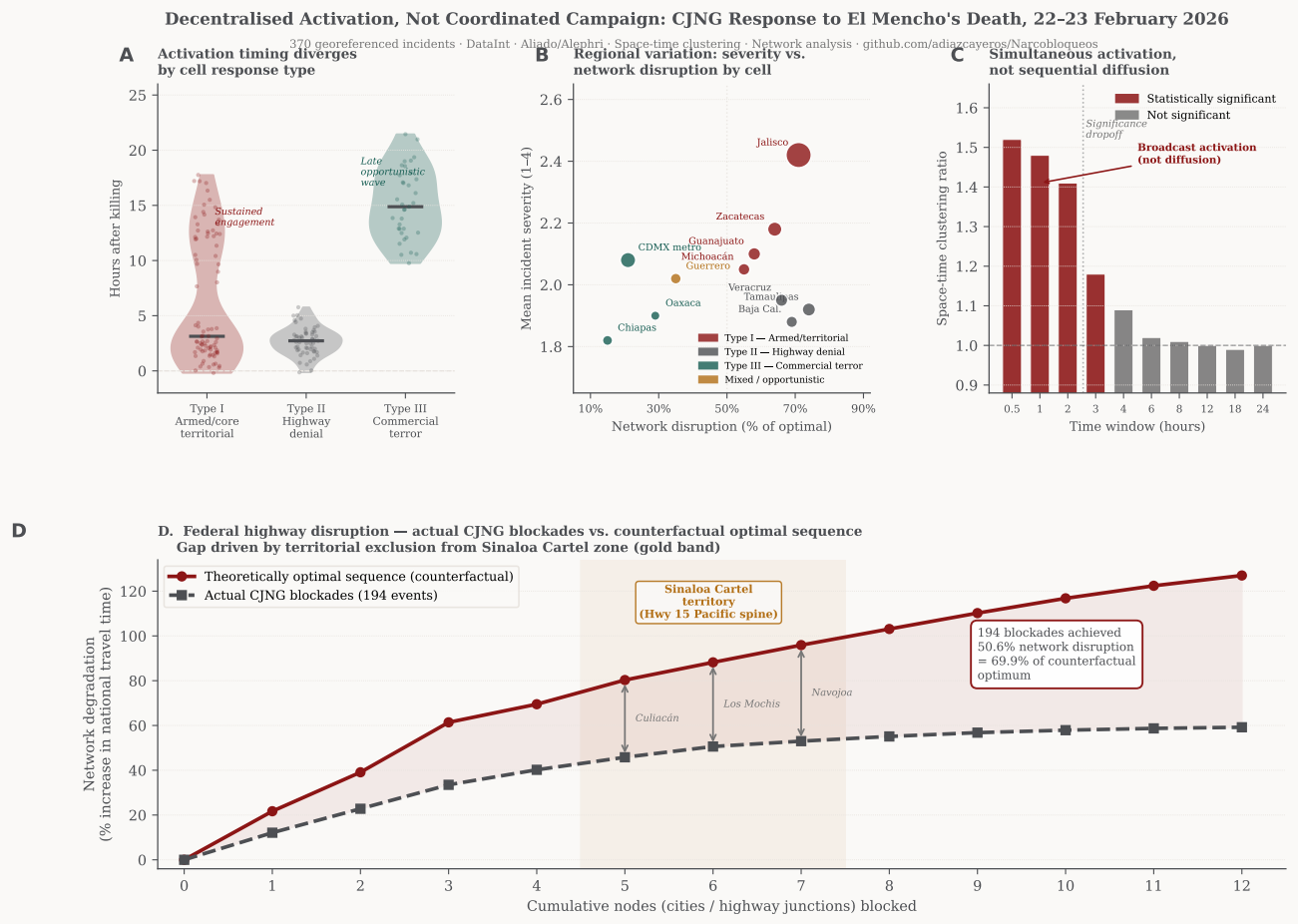


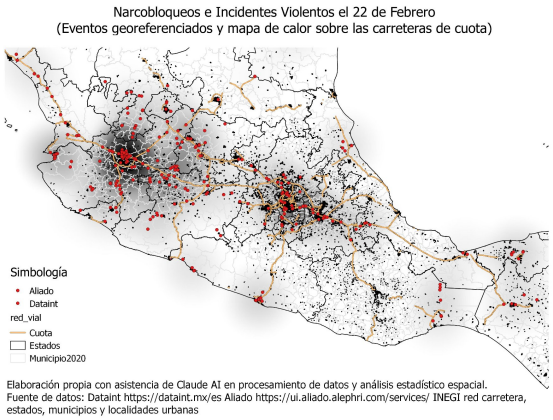
Figure 1: ***(A)*** *Activation timing by cell type — armed-core cells engaged within 2 h; commercial-terror peaked 15–18 h after the killing, consistent with opportunistic late activation.* ***(B)*** *Severity vs. road-network disruption by region: armed-core cells (red) cluster in the high-severity, 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).*

Undercount: OXXO Stores and Bancos del Bienestar

The dataset captures **12 georeferenced OXXO attacks** and **12 Banco del Bienestar branches** — yet FEMSA reported over **200 stores** affected and the government acknowledged more than **50 bank branches** targeted. Commercial attacks are harder to geolocate in real time than road blockades, and both platforms prioritise events with direct mobility impact. The map is therefore a radiograph of CJNG's territorial and highway presence, not a comprehensive census of total economic damage.

Guardia Nacional Casualties: Putting the Numbers in Context

At least **25 Guardia Nacional officers** were killed in the 24 hours following the killing — the vast majority in **ambushes and checkpoint attacks across multiple states**, not during the Tapalpa operation itself. This matters analytically: those deaths reflect the pre-existing lethal capacity of local CJNG cells acting on the broadcast signal, not a coordinated counteroffensive from above. Sobering evidence of lethality in CJNG territory — not of national military projection.



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.*