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Ceasefire as Subsidy: Armed-Group Consolidation Under Colombia's Total Peace

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Executive Summary

With the inauguration of Colombia's first leftist president¹ in 2022, the government of Gustavo Petro swiftly embarked on a peacemaking initiative dubbed Total Peace. Under the policy, armed groups were engaged through a negotiating strategy of mutual legitimacy that largely eschewed the military-led approaches of previous administrations.² While the policy yielded genuine successes in reducing violence, it also lent armed networks a degree of operational security that enabled their continued growth across much of the country. With Petro soon ceding power to a right-wing populist who has disavowed the policy,³ Total Peace is worth studying for its successes as much as its drawbacks. In particular, three findings stand out.

- **Ultimately, violent conflict with state actors declined.** Armed Conflict Location and Event Data identified a 28% reduction in violent events involving security forces coming into conflict with armed groups during Petro's first 27 months in office, with an 11% reduction in overall fatalities from armed-group violence compared to the period before his inauguration.⁴ However, the decline was concentrated in conflicts with security forces as opposed to overall violence.
- **Ceasefires were unconditioned, which rendered them exploitable.** The bilateral ceasefires were launched without verification protocols or restrictions on recruitment to expand ranks. Armed groups gained operational initiative, at almost no cost to them.⁵
- **Armed groups used the ceasefires to consolidate, deepening their organizational power.** Membership across Colombia's armed groups grew by more than 5,000 in 2025 alone, exceeding 27,000.⁶ In spite of the state's military operations belatedly resuming, groups expanded their control over illicit revenue streams.⁷ Inter-group confrontation rose to its highest levels in a decade, as factions competed over the spoils.

The policy was not uniformly a failure, as its one disarmament process emerged from regional talks that possessed the structural features the national ceasefires lacked. For U.S. policymakers weighing engagement with Colombia's incoming government, the lesson is not that negotiation fails. Negotiation strategies hold promise in reducing violent conflict, but the structural details matter. In effect, ceasefires that concede operational security without verification or conditions function as a subsidy to the groups they are meant to demobilize.

Problem Statement

Total Peace presents United States national security professionals with a puzzle, whose resolution matters beyond Colombia. Ultimately, ceasefires that concede operational security without verification or conditions function as a subsidy to the groups they are meant to demobilize. The policy succeeded on its primary metric, reducing the violence that the state faced from armed groups. However, those same groups consolidated in ways that grew their organizational strength. For the United States, the stakes are direct. Colombia is the United States' closest hemispheric security partner, as well as the principal source of cocaine entering the United States. Its incoming government was elected on an explicit repudiation of Total Peace, with it now preparing to confront armed groups that Fundación Ideas para la Paz

projects could soon approach 30,000 members.⁸ This paper examines the structural design of the Petro government's ceasefires to account for that paradox, with analysis reflecting events through June 30, 2026.

Background

The Colombian legislature passed Ley 2272 in 2022, formalizing Total Peace through the expansion of Ley 418 de 1997. The law introduced a synchronized, dual-track framework departing from the sequential model of the 2016 accord with the Revolutionary Armed Forces of Colombia.⁹ Article 2 defines two concurrent types of processes, tailored to the nature of the armed actor in question. For armed groups that operate outside of the law, the state is authorized to conduct dialogues aimed at political solutions to the armed conflict.¹⁰ For criminal organizations lacking political status, the mechanism is strictly limited to conversation aimed at their submission to justice.¹¹

On December 31, 2022, the Petro administration issued several executive decrees that established bilateral ceasefires with five prominent armed groups.¹² According to Armed Conflict Location and Event Data, these initial agreements lacked formal verification protocols or territorial demarcation.¹³ The fragility of this framework became immediately apparent when the National Liberation Army publicly denied ever agreeing to the bilateral truce, followed by the partial or full suspension of ceasefires with two other groups within months.¹⁴ Critically, these were failures of implementation rather than of legal authority. Ley 2272 contemplated verification mechanisms, with the decrees nominally conditioning the ceasefires on monitoring protocols. But the ceasefires took effect on January 1, 2023, before any protocol had been negotiated or any verifier had agreed to serve. The decree covering the Estado Mayor Central suspended military operations immediately, while merely undertaking to request United Nations verification at some future point.¹⁵

Before the implementation of Total Peace, Colombia's illegal armed groups were already expanding. Following the 2016 accord, dissident factions competed aggressively with criminal organizations over the territories vacated by the demobilizing Revolutionary Armed Forces of Colombia. This is a dynamic that International Crisis Group documented in the accord's immediate aftermath,¹⁶ which data from the Fundación Ideas para la Paz shows continuing without interruption from 2018 onward.¹⁷ At the policy's outset in February 2023, the International Crisis Group warned that the administration's broad negotiating agenda risked allowing armed groups to expand their reach.¹⁸ Total Peace did not initiate the expansion, but it did fail to arrest it. By December 2025, Fundación Ideas para la Paz counted more than 27,000 members across the principal armed groups. This growth persisted through the ceasefire period, with inter-group disputes at their highest level in a decade.¹⁹

Now, Total Peace passes into other hands. President Petro's term ends on August 7, 2026, with his right-wing successor having won the June 21, 2026, runoff on an explicit repudiation of the policy. Incoming president Abelardo de la Espriella campaigned on a return to hardline, military-led security policy.²⁰ The incoming administration inherits the armed landscape

described above, with larger groups contesting more territory than at any point since 2016. From Bogotá to Washington, the lessons of the outgoing policy are now the operative baseline for whatever comes next.²¹

Violence Declined

On its primary metric, Total Peace delivered. When analyzing the conflict from a U.S. perspective, any assessment must begin by crediting that success. Armed Conflict Location and Event Data recorded a 28% decline in violent events involving security forces during Petro's first 27 months in office. Overall, fatalities from armed-group violence dropped 11%.²² All told, the mechanisms were direct. Offensive operations were suspended against groups covered by ceasefires, with the government initially restraining aerial bombardment. Ultimately, this restraint was later reversed as the policy deteriorated.²³

However, the decline in violence was narrow. It was specifically concentrated in state-group violence, while confrontation between armed groups rose over the same period. As the following sections detail, coercion of civilians also increased. The central achievement of the policy was real, but it came with real costs.

Ceasefires Without Conditions

The bilateral ceasefire was the policy's central instrument, with its design being the feature most relevant to any future negotiation the United States chooses to back. The exchange was asymmetric in construction, with the state suspending offensive pressure while the groups made few enforceable concessions. No territorial demarcation confined them, while no provisions restricted recruitment or extortion.²⁴ International Crisis Group identified the danger at the outset, warning in February 2023 that the agenda could allow armed groups to expand their reach if it lacked stronger conditions.²⁵ Alas, the warning went unheeded. In effect, the ceasefires functioned as a subsidy. They lowered the cost of armed-group expansion, without imposing any offsetting obligation. Verification eventually emerged under one renegotiated arrangement with the National Liberation Army, but only after the groups had banked months of unmonitored consolidation.²⁶

Consolidation During the Pause

The predicted consequences materialized measurably, defining the landscape Washington's closest regional partner now confronts. By December 2025, Fundación Ideas para la Paz counted in excess of 27,000 members across the principal armed groups. This represented a 23.5% increase over December 2024, with more than 5,000 members added in that year alone. Growth was continuous, including a 7% rise in the final six months of 2025. It was led by the Gulf Clan, which added nearly 2,300 members. In Fundación Ideas para la Paz's assessment, neither military action nor negotiations reduced any group's capacity to reconstitute.²⁷

Ultimately, manpower was one dimension of a broader consolidation. The country had at least 13 zones in active armed dispute by the end of 2025, with confrontations between armed groups rising 34% to their highest level in a decade.²⁸ The groups deepened their hold on illicit revenue beyond cocaine, including extortion. The burden ultimately shifted onto civilians, with movement restriction affecting more than 1,000,000 people in 2025. Forced displacement rose 85%, while kidnapping increased by 133%.²⁹ While violence may have slowed, social control only grew harsher.

Partial Successes, Counterarguments

The record is not uniformly negative, with the exceptions being instructive for policymakers weighing which architectures merit U.S. support. One splinter of the National Liberation Army undertook the policy's first weapons handover in 2025, through a process that was more regional than national. It was also sequenced, with several steps conditioned on concrete action.³⁰ The case remained incomplete, but it demonstrates that conditioned ceasefires produced more disarmament than unconditioned truces.³¹

Some may point out that armed-group expansion predates Total Peace, with Fundación Ideas para la Paz attributing the growth to several drivers beyond the ceasefires. While this is true, the ceasefires' design ensured that the state applied no brake. Group expansion proceeded openly in precisely the zones where military pressure was suspended, at no negotiating cost to the groups.³² It could also be argued that causality may have run the other way, with the decline in violence being more attributable to group consolidation than the state's timidity. Ultimately, even this framework indicts the plan's design. Regardless of which party initiates the calm, a ceasefire that fails to verify conduct or condition benefits will reward consolidation.³³

Implications for U.S. Policy

Colombia's incoming government has promised the opposite of Total Peace, with President-elect de la Espriella having campaigned on hardline security policy in conjunction with closer alignment with the United States.³⁴ He inherits an armed landscape that Fundación Ideas para la Paz projects could approach 30,000 members, a larger network than the one Petro inherited. The network will also be more technologically capable, with 277 explosive drone attacks recorded in 2025 alone.³⁵

A purely military answer poses its own feasibility problem, with Colombian security operations already having increased 34% in 2025 without clear improvement in security conditions. Fundación Ideas para la Paz characterizes the state's posture as reactive, with weakened intelligence capacity.³⁶ The evidence assembled here does not indict negotiation as a strategy, but it does identify which negotiating architecture failed in practice. For U.S. policymakers, three lessons follow.

- **First, verification should be the price of any ceasefire.** U.S. support for future negotiations should be conditioned on verification protocols, as well as restrictions on

armed-group expansion present at the negotiation's inception. As Colombia's record shows, conditions grafted on after the fact arrive too late to prevent consolidation.

- **Second, armed-group consolidation should be treated as a counternarcotics problem.** The two armed groups that grew the most are central to cocaine production, at a moment when bilateral counternarcotics cooperation is already strained.³⁷ Their gains correlate directly with trafficking capacity, making ceasefire design a U.S. counternarcotics concern.
- **Third, U.S. policymakers should hold a line for the incoming government.** Washington should make clear that its support for renewed negotiations or for the hardline alternative de la Espriella has promised cannot tip into tolerance of violence or permissiveness toward armed groups, a limit Fundación Ideas para la Paz itself has urged.³⁸

Total Peace did not fail because Colombia talked to its armed groups, but it did fall short because of what it gave away in the process.

Endnotes

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