China's Growing Influence in Latin America and the Caribbean

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The Expanding Leverage of the People’s Republic of China in Latin America
Implications for US National Security and Global Order

Maj Gen Evan L. Pettus, USAF

Abstract

This article examines the growing influence operations conducted by the Chinese Communist Party–led government in Latin America, presenting strategic risks to US national security and global order. The author highlights the surprising breadth and scale of China’s influence, encompassing economic entanglements, critical infrastructure investments, coercive diplomacy, and information control. By leveraging economic ties, controlling critical minerals, and establishing ports and space facilities, China gains significant leverage over the region, undermining democratic governance and posing risks to US interests. The article emphasizes the need for a comprehensive global strategy to address this challenge, including offering competitive alternatives to Latin American nations and supporting their institutional capacity. Failure to do so could undermine US and allied ability to compete in the Indo-Pacific and uphold the rules-based international order.

Xi is the first Chinese leader to align the country’s capabilities with a vision and strategy to realize the long-held dream of rejuvenation. He and the rest of the Chinese leadership are not satisfied with their country’s position within the international system... They want to reorder the world order.

—Elizabeth C. Economy
The World According to China

I currently serve as the Commander of 12th Air Force (Air Forces Southern), the air component to US Southern Command (USSOUTHCOM). I lead an organization of professionals with extensive regional expertise and experience. However, I am relatively new to Latin American affairs. Prior to assuming command, I believed that the most relevant issues impacting US national security in the region would be the well-known challenges posed by certain actors, such as transnational criminal organizations (including drug cartels), instability linked to poverty, weak governance, and fragile institutions, vulnerability to natural disasters, as well as persistent challenges to democratic norms presented by autocratic states like Venezuela and Cuba.

I was not entirely wrong, as these problems exist and persist today. However, I underestimated the extent of the influence operations conducted by the Chinese Communist Party–led government of the People’s Republic of China (PRC) in...
the region. As I approach the one-year mark in my command, I am increasingly concerned about the strategic risks the PRC’s actions pose to the national security interests of the United States and the sovereignty of our partner nations in Latin America. The PRC adopts various methods to enhance its access and influence in the Western Hemisphere, employing both subtle and overt approaches. The PRC establishes aggressive and coercive economic ties with nations in the region and uses those ties to exert deep influence over local and national governments. Levers of power include building and operating critical infrastructure, controlling information technology networks, and monopolizing access to vital supply chains. Additionally, the PRC strategically constructs ports near crucial maritime chokepoints that could potentially facilitate future military activities. Their investment in critical infrastructure extends to ostensibly civilian space facilities, which thinly veil their military connections and potential military applications. Moreover, the PRC employs coercion and information control to advance its diplomatic objectives and suppress opposition.

In short, the authoritarian government of the Chinese Communist Party (CCP) has strategically positioned the PRC over the past few decades, granting Beijing a significant degree of leverage over the region, thereby endangering democratic sovereignty and US interests. However, the expanding leverage of the PRC in Latin America and the Caribbean has ramifications that stretch far beyond the region, posing a global risk. More specifically, the ability of the United States and its allies to compete in the Indo-Pacific and uphold the rules-based international order could be undercut by asymmetric disadvantages developing in the Western Hemisphere. I concur with the commander of US Southern Command, General Laura Richardson: “This is a decisive decade and our actions or inactions regarding the PRC will have ramifications for decades to come.”

A Global Strategy

The US National Security Strategy (NSS) emphasizes the objective of achieving “a free and open Indo-Pacific,” while the 2022 National Defense Strategy (NDS) focuses on “deterring aggression, while being prepared to prevail in conflict when necessary—prioritizing the PRC challenge in the Indo-Pacific region.”

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1 Posture Statement of General Laura J. Richardson, Commander, United States Southern Command Before the 118th Congress House Armed Services Committee, 8 March 2023, 3, https://www.southcom.mil/.
The Expanding Leverage of the People’s Republic of China in Latin America

Quently, one risk for US national security decision makers is the potential overemphasis on preparing to compete with the PRC in Asia at the expense of other critical regions worldwide. Specifically, the activities of the PRC in the Western Hemisphere collectively pose a significant challenge to the interests of the United States and its allies. By undermining democratic governance in the region, the PRC threatens the US shift to the Indo-Pacific by jeopardizing freedom of maneuver, access, and influence in our near-abroad.

The US National Military Strategy (NMS) urges the joint force to “proactively identify and leverage opportunities to frustrate adversaries’ strengths, exploit vulnerabilities, and expand U.S. partnerships, access, and basing.” However, executing this type of global campaign is not exclusive to the United States. Arguably, the PRC has been conducting a comprehensive whole-of-government effort for years, serving its own nefarious purposes and eroding democratic principles across Latin America and the Caribbean. To counter this effort, it is imperative to redirect some of our attention to the region closer to home.

Economics

From 2000 to 2020, trade between China and Latin America grew from USD 12 billion to USD 315 billion, marking a 26-fold increase. Projections indicate that by 2035, this trade volume will exceed USD 700 billion. Presently, China stands as the largest trading partner for South America. In Brazil, the largest and most populous nation in the region, trade with China surpasses trade with the United States by a ratio of more than two to one. Furthermore, the value of Brazilian exports to China surpasses the combined exports to the United States and European Union. While economic entanglement may not be inherently negative, it is important to highlight the PRC’s record of aggressively leveraging its economic influence to suppress dissent. Former Peruvian presidential candidate Julio Armando Guzmán recently remarked that “the Chinese attitude toward Latin America has changed. At the beginning, [Chinese influence] was based fundamentally in soft power, in trying to convince Latin American countries that China’s rise would be very good for the region. . . [Now,] China is willing to impose its power and is using hard power to try and get countries to do what it wants.”

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6 “Brazil (BRA) and China (CHN) Trade,” Observatory of Economic Complexity, 2023, https://oec.world/.
Latin America holds approximately 50 percent of the world’s known lithium reserves, and PRC entities control nearly two-thirds of global lithium processing and refining. Chinese companies have near-total dominance over rare earth elements (REE) extraction, extending their control over global supply chains into Latin America. This is critical to note as, in the past, the PRC has demonstrated its willingness to employ its supply-chain monopoly as a foreign policy tool, as seen in the 2010 REE export freeze that disrupted the Japanese auto industry and the 2020 threat of sanctions on US defense contractors. The PRC may already have a significant degree of control of Latin American supply chains. Not only does this jeopardize US access to vital sources of critical minerals but also provides a significant lever for influencing Latin American governments and institutions.

The PRC’s exploitative and predatory behavior does not end there in its pursuit for Latin American resources. Chinese fishing fleets, subsidized by the Chinese Communist Party, illegally extract approximately USD 3 billion annually from the territorial waters of South American nations through illegal, unreported, and unregulated fishing. CCP-linked entities further harm Latin American environments, economies, and institutional stability by supporting illegal mining and illicit logging in the region. These exploitative activities cause environmental damage to vulnerable communities, undermine economic development, and foster institutional corruption that erodes democratic governance.

Geostrategic Corruption

PRC-related businesses and state-owned enterprises operating in Latin America and the Caribbean actively engage in securing access to resources and exerting influence over critical infrastructure in the region through a phenomenon termed geostrategic corruption, as identified by scholars Eduardo Gamarra and Valeriia Popova. These entities frequently disregard factors that would dissuade other bidders, ignoring environmental regulations and labor rights. Moreover, they have the freedom to offer bribes to local government officials engaged in rent-seeking behaviors, without facing any accountability from the PRC government. This
competitive advantage allows PRC entities to gain significant control over resources and infrastructure in regions where host-nation institutions lack the capacity to identify and combat corruption. Such actions pose a threat to both the US security interests and the sovereignty of democratic nations in the region.

**Infrastructure and Dual-Use Facilities**

China’s investment in Latin America and the Caribbean through the Belt and Road Initiative (BRI) is substantial, with 21 nations in the region currently committed to participation. This influx of resources may not appear as beneficial as it seems on the surface because PRC infrastructure investments often impose significant risks on host nations, potentially jeopardizing their core sovereign interests. PRC law and practice mandate that China-based companies serve the state’s interests, raising concerns about infrastructure projects sponsored by these companies. PRC technology companies are required by law to share data with the Chinese government, making data flowing through PRC-installed 5G and other technological infrastructure theoretically vulnerable to exploitation. These risks are deeply ingrained in the system, and there are no technical workarounds to mitigate them.

PRC-based technological infrastructure in key government and commercial sectors of Western Hemisphere nations create potential vulnerabilities to malign influence operations that run counter to the interests of the United States and its partners. Moreover, there is additional coercive potential stemming from other infrastructure initiatives. For example, Chinese companies are currently engaged in significant energy sector projects in Argentina, Honduras, Ecuador, Colombia, and Peru. Notably, PRC-linked entities have recently obtained control over 57 percent of electrical transmission in Chile. Dean Cheng, a senior fellow at the Potomac Institute for Policy Studies, recently told me he had significant concerns about hidden vulnerabilities in projects constructed by Chinese firms in Latin America. For instance, pipelines and power distribution networks could be designed to rely on BeiDou satellite timing signals for their effective operation. Governments dependent on such infrastructure to support their populations may face coercive...
threats. The intersection of various critical infrastructure types and the documented coercive tendencies of the PRC’s authoritarian government poses inherent risks.

Other types of infrastructure investment also raise concerns. The PRC has established a growing network of space facilities in Latin America, typically claiming civilian purposes. However, the involvement of the Peoples Liberation Army Strategic Support Force in almost all PRC space activities suggests these facilities likely possess undisclosed military capabilities.\(^{15}\) According to Admiral Craig Faller, former commander of USSOUTHCOM, some of these facilities may contribute to the PRC’s “ability to monitor and potentially target U.S., allied, and partner space activities.”\(^{16}\)

There are other, even more worrying, PRC-linked investments in Latin America and the Caribbean. Chinese companies are constructing large port projects near vital supply routes and strategic maritime chokepoints. Although these projects are presented as commercial in nature, the PRC has demonstrated a consistent pattern of gradually upgrading similar facilities worldwide to enable future military use. Due to their China-centric motivations and historical tendencies in other regions, there is no guarantee that these facilities could not be converted to military or strategically disruptive purposes in the future. If the PRC can exert sufficient influence on host governments, port projects near key lines of communication in the Western Hemisphere could potentially accommodate PRC military forces, posing a risk to the freedom of maneuver for both military and commercial traffic of the United States and its partner nation. Military forces do not need to be present to raise concern. For instance, General Richardson states, “PRC-sponsored companies are engaged in, or bidding on, several projects related to the Panama Canal—a global strategic chokepoint. These projects include port operations on both ends of the canal, water management, and a logistics park.”\(^{17}\) Entities strategically aligned with the PRC possess their own latent disruptive potential.

**Information Control**

The PRC has actively employed coercion and information control to diplomatically isolate Taiwan. Since 2000, the PRC has successfully influenced six Western Hemisphere governments to switch recognition from the democratic

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\(^{17}\) Posture Statement of General Laura J. Richardson, Commander, United States Southern Command Before the 118th Congress House Armed Services Committee, 8 March 2023, 5, https://www.southcom.mil/.
Republic of China (Taiwan) to the PRC. This shift was a response to a combination of PRC incentives and pressure. The governments of the Commonwealth of Dominica, Costa Rica, the Dominican Republic, Panama, El Salvador, and most recently, Honduras, changed their stance. In no small part, this shift in rhetoric may be tied to China's tendency to undermine democratic governance, often by punishing speech or policy positions with which it disagrees.

A study conducted by Freedom House in 2022 revealed that the PRC has actively suppressed media, intimidated local journalists, and targeted Chinese dissenters across several Latin American countries, including Brazil, Peru, and Argentina. Furthermore, Chinese intimidation tactics have resulted in limited coverage of PRC activities and self-censorship in Chile, Panama, Argentina, and Peru.18 The suppression of freedom of speech, coupled with extensive media influence campaigns throughout Latin America, has provided the PRC with an information advantage in the region. This advantage enables them to either mask or restrict the dissemination of unfavorable reports concerning their malign activities. Any attempts to push back against their actions are met with punishment.

What to Do

It is important to acknowledge that many nations in Latin America believe that the benefits of partnering with the PRC outweigh the potential risks involved. Chinese loans and investments, for instance, often come with fewer restrictions compared to those offered by Western firms.19 Countries grappling with poverty, crime, instability, and institutional weakness frequently find limited alternatives or find the ease of dealing with the PRC too tempting to resist. Some argue that maintaining a balanced relationship with both the United States and the PRC can bring economic benefits without the need to choose one and risk alienating the other.

However, it is crucial to recognize that the PRC has a well-documented history of putting partner nations’ interests at risk through its investments. Increasing evidence suggests that the growing PRC influence in Latin America and the Caribbean poses a significant risk to the geostrategic interests of the United States, the rules-based international order, and the sovereign interests of democratic nations in the region. To mitigate this risk, the United States must engage in a comprehensive effort involving all government agencies. This effort should shed light

on how PRC actions in the Western Hemisphere undermine the sovereignty of
democratic nations, provide competitive alternatives to partners facing difficult
choices, and support democratic nations in building the institutional capacity
necessary to mitigate risks when engaging with the PRC and other potentially
predatory partners. Failure to do so risks ceding key terrain in the global struggle
to preserve democracy and the rules-based international order.

Maj Gen Evan L. Pettus, USAF

Major General Pettus is the Commander, 12th Air Force, Davis-Monthan Air Force Base, Arizona. As the Air Force component to US Southern Command, 12th Air Force (Air Forces Southern) conducts security cooperation and provides air, space, and cyberspace capabilities throughout Latin America and the Caribbean. 12th Air Force supports US Southern Command to deter aggression, defeat threats, rapidly respond to crises and work with allies and partner nations to build regional capacity to ensure a secure, free, and prosperous Western Hemisphere.

Prior to this assignment, Major General Pettus was the Vice Commander, US Air Force Warfare Center, Nellis Air Force Base, Nevada, where he was responsible for coordinating operational testing and tactics development programs and advanced training schools, exercises and venues in developing innovative leaders and Airmen with proven and tested technology, the most current tactics, academic training and opportunities to practice integrated force employment.

Major General Pettus earned his commission from the US Air Force Academy in 1994. He graduated from Euro-NATO Joint Jet Pilot Training at Sheppard AFB, Texas, and was first stationed at Royal Air Force Lakenheath, United Kingdom, as an F-15E pilot. He is a graduate of the US Air Force Weapons School and is a command pilot with more than 2,700 hours. He has flown combat missions in operations Northern Watch, Southern Watch, Allied Force, Enduring Freedom, Iraqi Freedom, and Inherent Resolve.
FEATURE

The Impact of the Turn to the Left on the Advance of the People’s Republic of China in Latin America

DR. R. EVAN ELLIS

Abstract

This work uses the comparative method, complemented by quantitative data, to examine engagement by the People’s Republic of China (PRC) in Latin America as a function of government type, across a range of activities, including trade, investment, infrastructure projects, security relations, and technical architectures over the past two decades. The findings indicate that the PRC establishes distinct and often broader forms of engagement with populist, anti-US governments, although this does not necessarily translate into a higher volume of PRC investment or overall trade with those governments. This is the first major work in the growing China–Latin America literature to explicitly analyze the dynamics of PRC engagement across regime type. It contributes to strategic analysis of the PRC challenge in the region by the operational force, including the identification of risks, and the formulation of responses, including credible messaging, in support of a coordinated whole-of-government response to the PRC challenge.

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Latin America is currently undergoing an unprecedented political shift. This phenomenon is characterized by the recent electoral victories of left-of-center candidates in Mexico in 2018; Argentina in 2019; Peru, Honduras, and Chile in 2021; and in Brazil and Colombia in 2022. Additionally, it involves the consolidation of power by authoritarian populist regimes in Venezuela and Nicaragua. Moreover, the region has witnessed the emergence of non-left populist regimes, exemplified by the Nayib Bukele regime in El Salvador, which is less inclined to cooperate with US principles on democracy and human rights. The trajectory of the region is further complicated by the economic and political strains caused by Covid-19 and the inflationary effects resulting from Russia’s invasion

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of Ukraine. These factors have contributed to widespread protests across various countries, including Peru, Ecuador, and Panama.³

Coinciding with Latin America’s political shift is a deepening engagement by the People’s Republic of China (PRC) and its corporate entities in the region. This engagement encompasses a growing political component, exemplified not only by China’s Belt and Road Initiative (BRI), but more recently by its Global Development Initiative (GDI) and Global Security Initiative (GSI), which broaden the scope of PRC’s involvement in the region.⁴ Moreover, the PRC has fostered closer ties with Latin America through initiatives like the China-CELAC forum and its ongoing working groups.⁵ Recent diplomatic recognition of the PRC by Nicaragua and Honduras, as well as expanding military engagements such as the commitment of armored vehicles to Peru and the delivery of thousands of bulletproof vests and helmets to Panama and Costa Rica, further underscore the extent of PRC’s involvement in the region.⁶

US government officials and academics have issued warnings regarding the negative relationship between PRC engagement and authoritarian and left-oriented governments in the Latin American region.⁷ Reciprocally, the erosion of US influence due to the region’s political shift, coupled with escalated US-China tensions and the potential for a conflict stemming from a PRC invasion of Taiwan, have collectively heightened concerns over China’s advancement, particularly in the US near abroad.⁸

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While the PRC and its corporate entities engage with governments across the political spectrum in various regions, Chinese leaders maintain that their progress is not aimed at undermining the United States. Although China generally refrains from forming politically allied blocs or actively supporting the overthrow of non-cooperative governments, existing literature suggests the presence of a reciprocal relationship in which political shifts toward leftist and authoritarian populist governments benefit the PRC, while PRC engagement supports and reinforces those shifts.

This study examines the relationship between the unprecedented rise of anti-US authoritarian and leftist governments in Latin America, specifically analyzing the historical records of political, commercial, investment relations, infrastructure projects, and security arrangements over the past two decades. The findings indicate that the PRC engages in a distinct and often comprehensive manner with ideologically sympathetic governments. However, this does not necessarily imply a greater volume of PRC investment or overall trade. The study reveals evidence suggesting that this relationship provides personal benefits, technical assistance, and economic advantages that contribute to the consolidation of power within nondemocratic regimes. Nevertheless, the data does not definitively establish the PRC as the primary factor behind their success. Conversely, for the PRC, this research suggests that its association with authoritarian populist and leftist governments yields strategic advantages, opportunities for expanding markets in military and digital technologies, and proves commercially lucrative for its companies, despite being accompanied by political and contractual perils.

Methodology

This qualitative study selectively incorporates quantitative data on trade, investment, and other aspects of PRC interaction with the region. Given the extensive scope and multidimensionality of the relationship being addressed within limited space, this work is necessarily preliminary in nature. Additionally, the availability of data imposes multiple limitations on this study. While there exists credible, albeit imperfect, trade, investment, and infrastructure project data covering the region’s initial wave of leftist populist governments in the mid-2000s, the analysis of the most recent political shift, which arguably began in 2018 with the inauguration of Andrés Manuel López Obrador (AMLO) in Mexico, followed by the

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Ellis

return of a leftist Peronist government in Argentina in December 2019, and expanded in 2021 with left-wing victories in presidential elections in Peru, Honduras, and Chile, as well as in 2022 with the triumph of leftist presidential candidates in Colombia and Brazil, is limited due to the scarcity of data. Most time-series data conclude in 2021, which hampers the examination of the latest developments.

Complicating analysis, agreements between the PRC and authoritarian populist governments often lack transparency, particularly regarding the details of the contracts and other agreements involved. Consequently, this analysis relies on the limited publicly available data found in press reports concerning such deals.

Furthermore, PRC engagement with the most recent cohort of leftist and populist authoritarian governments coincides with the challenges posed by COVID-19 and the inflationary effects resulting from Russia’s invasion of Ukraine. These factors have distorted economic engagement and public contracting across the political spectrum in governments. Therefore, this study places particular emphasis on examining the differences in relative performance within the region, specifically comparing authoritarian populist, leftist, and other governments in their relationships with the PRC, while attempting to account for regional and global distortions.


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PRC Political Engagement

Over the past two decades, governments spanning the ideological spectrum have actively engaged with the PRC, as evidenced by state visits, such as Colombia's conservative President Álvaro Uribe's trip to Beijing in April 2005 and Cuba's Miguel Díaz-Canel's visit in December 2022. Anti-US populist regimes have generally exhibited a greater inclination toward political cooperation with the PRC, although the PRC has generally refrained from endorsing anti-US statements made by those regimes.

Nearly all the states recognized by the PRC as “strategic partners” or “comprehensive strategic partners” were left-of-center when the relationship was established. However, it is worth noting that the Communist government in Cuba, the first to diplomatically recognize the PRC in 1959, has never been recognized as a strategic partner.

Regarding adherence to the BRI, the precise obligations for both the PRC and participating members remain unclear. Nevertheless, governments across the political spectrum in Latin America have signed onto the BRI, following China’s recognition of the concept’s extension to the Western Hemisphere with Panama’s adherence in June 2018. However, a small number of Latin American states, primarily non-leftist and strongly aligned with the US, such as Brazil under Jair Bolsonaro and Colombia under Iván Duque, have chosen not to join the BRI. Conversely, the shift from a right-leaning to a left-leaning government in Argentina in 2019 seemed to be a crucial factor in its decision to sign on to the BRI in March 2022. Similar changes in Brazil’s and Colombia’s governments have sparked speculation that the left-oriented regimes in both countries will join the BRI during forthcoming presidential visits.

Trade

In trade, anti-US populist left regimes have witnessed an expansion in their share of total trade with the PRC compared to their proportion of trade with the US. While other types of regimes have also experienced an increase in trade with the PRC, the growth has generally been more substantial for anti-US populist left

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15 “Argentina joins China’s Belt and Road. What are the implications?,” China Project, 4 March 2022, https://thechinaproject.com/.
regimes. Surprisingly, even after the replacement of anti-US populist left regimes by others, the percentage of trade with the PRC continues to expand. This trend may indicate the establishment of strong ties with the PRC during the populist era, coupled with the enhanced feasibility of conducting business under more institutionalized governments.

As a baseline, in 2002, Latin America’s trade accounted for 5 percent of its trade with the United States. This figure grew to 12 percent in 2006 and reached 47 percent by 2021.16

In Venezuela, in contrast to the benchmark, the proportion of trade with the PRC relative to its trade with the US increased from 2 percent in 2002 to 54 percent in 2017. Subsequently, it experienced uneven expansion, reaching 166 percent of Venezuelan trade with the United States by 2021, during the peak of US sanctions against the regime of Nicolás Maduro.17

Ecuador’s trade with the PRC experienced significant growth during the tenure of the anti-US populist leftist government of Rafael Correa. At the beginning of Correa’s term in 2006, trade with the PRC accounted for 8 percent of Ecuador’s trade with the United States. By the election of Lenin Moreno in 2017, this figure had risen to 37 percent. Subsequently, trade with the PRC continued to rise, reaching 83 percent of Ecuador’s trade with the United States by 2021.18

In Bolivia, when leftist populist Evo Morales assumed power in 2006, the country’s trade with the PRC constituted 18 percent of its trade with the United States. By the time Morales left office in 2018, trade with the PRC had reached 110 percent of Bolivia’s trade with the United States. As of 2021, Bolivia’s trade with the PRC had further expanded to 156 percent of its trade with the United States.19

To compare the growth of trade between the PRC and more democratic leftist regimes, in Argentina, trade with the PRC represented 28 percent of its trade with the United States in 2002. This percentage decreased to 0.97 percent when Peronist leftist Cristina Fernández de Kirchner assumed office in 2007. During her tenure, trade fluctuated unevenly but eventually reached 110 percent by the end of her term in 2015. Under the center-right Mauricio Macri regime, trade with the PRC declined to 81 percent of Argentina’s trade with the United States before rebounding to 138 percent under the Alberto Fernández government by 2021.20

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17 “Exports and Imports by Areas and Countries,” 2023.
The Impact of the Turn to the Left on the Advance of the People’s Republic of China in Latin America

Investment

The data reveals that anti-US populist leftist regimes in the region have received minimal Chinese investment, particularly in comparison to loans from PRC-based policy banks. For instance, Cuba, despite contributing approximately 2% to the region’s GDP, received only 0.2 percent of Chinese foreign direct investment (FDI) from 2001 to 2021. Similarly, Venezuela, with a GDP share of 9 percent, received a mere 1.9 percent of PRC FDI during the same period.

During Evo Morales’ tenure as Bolivia’s anti-US populist leader from 2006 to 2018, his regime received only 0.1 percent of PRC FDI directed toward the region, despite Bolivia accounting for 0.7 percent of the region’s GDP, as estimated by the World Bank. Among anti-US populist left regimes, Rafael Correa’s Ecuador performed comparatively better, attracting 2.9 percent of PRC investments to the region during his presidency from 2006 to 2017, despite Ecuador’s GDP share being only 1.9 percent. This can be attributed to Ecuador’s more favorable market conditions in comparison to Venezuela and Cuba, enabling the country to attract investments primarily in the petroleum and mining sectors from the PRC.

Regarding the left-leaning regimes, they generally fell short of expectations based on their share of the region’s GDP in attracting investment. For instance, Argentina, which accounted for 8.9 percent of the region’s GDP, received only 5.2 percent of Chinese FDI directed toward the region during Peronist governments. Similarly, Mexico, despite representing over 23 percent of the region’s GDP, received a mere 8.4 percent of PRC investment. The only exception to this trend was Brazil, which surpassed expectations based on GDP. During the administrations of Presidents Lula and Dilma, Brazil received 41 percent of the PRC’s investment in Latin America, exceeding its share of the continent’s GDP, which stood at 29.5 percent.

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It is worth noting that several Chinese investments encountered challenges stemming from the politically charged environments surrounding nascent populist regimes with limited control over their populations. Notably, oil investments by PRC-based companies in the jungle region of eastern Ecuador and mining investments in the southern part of the country faced significant issues. Instances include the violent takeover of a PRC-operated oilfield in Tarapoa, Ecuador, in November 2006, and violent protests against another Chinese oil operation in the Department of Orellana in 2007.28 In the mining sector, local indigenous communities protested against Chinese plans, initiated during the Correa regime, to develop the massive open-pit Mirador mine in the southern Ecuadorian province of Zamora-Chinchipe.29

Chinese investments, however, encountered various challenges related to labor, community relations, environmental compliance, and other issues across the countries where they took place. Notable incidents include frequent strikes against PRC-owned mining operations in Marcona, Peru, e.g., Piura/Rio Blanco and Las Bambas, among others.30 These incidents transpired under both right-leaning and left-leaning governments. Similarly, Chinese difficulties arose in relation to the Zijin-operated Buriticá gold mine in Antioquia, Colombia, during the conservative Duque regime, with the situation persisting under the leftist government of Gustavo Petro.31

Chinese investments also faced obstacles due to actions taken by populist regimes that targeted the private sector. For instance, the Correa regime in Ecuador forced the renegotiation of oil sector royalties shortly after the PRC-based Andes consortium made a significant investment in the country. Similarly, the AMLO government in Mexico initiated initiatives to nationalize the lithium sector following a crucial investment in the sector by China’s Ganfeng.32 These instances prompted...

negotiations between the PRC-based companies and the populist government, ultimately resulting in partially favorable agreements for China.\textsuperscript{33}

**Loans and Infrastructure Projects**

In contrast to trade and investment, anti-US populist leftist regimes, along with certain left-leaning regimes, have enjoyed significant advantages in terms of PRC loans and PRC-funded infrastructure projects.

Regarding loans from China’s two policy banks, namely China Development Bank and China-Ex-Im Bank, anti-US populist regimes accounted for three out of the top five recipients of such loans between 2005 and 2019. According to the Inter-American Dialogue’s China–Latin America Finance Database, Venezuela’s USD 60 billion in loans constituted 44 percent of all funds disbursed during the period, despite the country representing less than 9 percent of the region’s GDP.\textsuperscript{34} Similarly, Ecuador received USD 18.2 billion, which amounted to 13.3 percent of all funds disbursed by PRC-based policy banks, an impressive figure for a country representing only 1.9 percent of the region’s GDP.\textsuperscript{35} Bolivia received USD 3.2 billion, accounting for 2.3 percent of PRC policy bank loans disbursed, a noteworthy achievement considering the country’s GDP contribution of only 0.7 percent to Latin America.\textsuperscript{36}

The other two countries among the top five recipients of PRC loans, Brazil and Argentina, primarily received funds during left-of-center governments. Brazil’s USD 31 billion constituted 22.7 percent of all PRC funds disbursed, slightly less than its share of 30 percent in the region’s GDP.\textsuperscript{37} Argentina’s USD 17.0 billion accounted for 12 percent of PRC funds disbursed, surpassing its 8.9-percent role in the region’s economy.\textsuperscript{38}

Regarding infrastructure projects, the Latin America and the Caribbean Network on China (abbreviated to RED ALC-CHINA in Spanish) based in Mexico demonstrates a similar trend. Work is disproportionately awarded to authoritarian populist and sympathetic leftist countries. However, PRC-based companies have progressively enhanced their capacity to engage with more institutionalized regimes in the political center and on the right.


\textsuperscript{35} Calculated from “China–Latin America Finance Database,” 2023.

\textsuperscript{36} Calculated from “China–Latin America Finance Database,” 2023; and “GDP (current US$),” 2023.

\textsuperscript{37} Calculated from “China–Latin America Finance Database,” 2023; and “GDP (current US$),” 2023.

\textsuperscript{38} Calculated from “China–Latin America Finance Database,” 2023; and “GDP (current US$),” 2023.
In terms of anti-US populist countries, Venezuela secured 8.2 percent of the total PRC infrastructure projects, roughly on par with its 8.8-percent share of the region’s GDP.\(^\text{39}\) In contrast, despite accounting for only 1.9 percent of the region’s GDP, the Correa regime in Ecuador captured 15.2 percent of PRC infrastructure projects.\(^\text{40}\) Similarly, during its time in office, the Morales administration in Bolivia obtained 9.9 percent of the PRC infrastructure projects, despite the country contributing a mere 0.7 percent of the region’s GDP.\(^\text{41}\) Notably, Cuba, despite its isolation, secured 5.2 percent of PRC infrastructure projects, more than double the expected amount based on its 2-percent share of the region’s GDP.\(^\text{42}\)

Among other leftist governments, the ability to capture Chinese infrastructure projects varied significantly, indicating the influence of country-specific factors. Among leftist governments, Argentina stood out by overperforming, securing 29 percent of PRC infrastructure projects awarded during the tenure of Argentina’s Peronist governments.\(^\text{43}\) This accomplishment is noteworthy considering Argentina producing only 8.9 percent of the region’s GDP, although this figure is distorted due to inclusion of the very large but currently stalled Atucha-III nuclear reactor.\(^\text{44}\)

On the other hand, Brazil underperformed in receiving infrastructure projects during the administrations of Lula and Dilma, obtaining only 10 percent of the projects awarded by the PRC.\(^\text{45}\) This outcome can be attributed to the dominant presence of Brazil’s own construction company, Odebrecht, and its policy bank, Bandes, prior to the exposure of the “Car Wash” scandal, which led to Odebrecht’s downfall. Mexico also fell short, receiving a mere 9.1 percent of PRC infrastructure projects during AMLO’s time in office, despite Mexico accounting for 23.3 percent of the region’s GDP.\(^\text{46}\) Similarly, Peru, among leftist governments, received only 0.3 percent of Chinese infrastructure projects awarded in 2021, during Pedro


\(^{40}\) Calculated from “Monitor de la infraestructura china en América Latina y el Caribe 2021,” 2023; and “GDP (current US$),” 2023.

\(^{41}\) Calculated from “Monitor de la infraestructura china en América Latina y el Caribe 2021,” 2023.

\(^{42}\) Calculated from “Monitor de la infraestructura china en América Latina y el Caribe 2021,” 2023; and “GDP (current US$),” 2023.

\(^{43}\) Calculated from “Monitor de la infraestructura china en América Latina y el Caribe 2021,” 2023.


\(^{45}\) Calculated from “Monitor de la infraestructura china en América Latina y el Caribe 2021,” 2023.

\(^{46}\) Calculated from “Monitor de la infraestructura china en América Latina y el Caribe 2021,” 2023; and “GDP (current US$),” 2023.
Castillo’s first year in office, despite its GDP share of 4.1 percent. \(^{47}\) This outcome likely reflects the prevailing political chaos and the associated uncertain investment environment in the country during that period.

In contrast, Chile, under leftist governments, performed in line with expectations, securing 7.9 percent of infrastructure projects during the Concertación governments led by Michelle Bachelet. This achievement aligns well with Chile’s contribution of approximately 5.8 percent to the region’s GDP. \(^{48}\)

In addition to numerical considerations, Chinese companies faced significant challenges in the region, particularly regarding project quality and performance. Their infrastructure projects were mired in conflicts with local governments and communities due to noncompliance with environmental and labor norms, as well as inadequate community consultations. In Venezuela, almost none of China’s major infrastructure projects were successfully completed. \(^{49}\)

Similarly, in Ecuador, China’s major hydroelectric projects encountered a multitude of issues. The Coca Coda Sinclair hydroelectric facility suffered from thousands of structural defects, and there were unfortunate incidents of deaths during the construction of the Coca Coda Sinclair and Delsitansagua facilities. \(^{50}\) China Water and Electric, the PRC-based company responsible for the Toachi Pilaton project, faced fines, as did China National Electric Equipment Corporation (CNEEC) for poor project performance on the Mazar Dudas and Quijos facilities. As a result of project noncompliance, CNEEC was ultimately removed from the Quijos project in 2016. \(^{51}\)

In Bolivia, all three major hydroelectric projects, as well as road and rail projects undertaken by China, were plagued by strikes and delays. Consequently, two rail projects were taken away from the PRC-based contractors due to their inability to meet the project requirements, among other actions. \(^{52}\)

\(^{47}\) Calculated from “Monitor de la infraestructura china en América Latina y el Caribe 2021,” 2023; and “GDP (current US$),” 2023.

\(^{48}\) Calculated from “Monitor de la infraestructura china en América Latina y el Caribe 2021,” 2023; and “GDP (current US$),” 2023.


Chinese projects also encountered difficulties in non-populist countries, but the presence of stronger government oversight arguably facilitated corrective measures before the situation escalated to extreme proportions.

**Taiwan**

Since 2007, six countries in the region have transitioned diplomatic relations from Taiwan to the PRC. These countries are Costa Rica, Panama, the Dominican Republic, El Salvador, Nicaragua, and Honduras. Despite historically close relations with the United States, as seen in the cases of Panama, the Dominican Republic, and previously El Salvador, the regimes that changed relations have had a range of ideological orientations. However, in almost all cases except Costa Rica, a divergence from the country’s political alignment with the United States appeared to have influenced the decision to switch diplomatic recognition. Conversely, the remaining countries that firmly support Taiwan include ideologically conservative regimes in Guatemala and Paraguay, which have been reluctant to make themselves vulnerable to PRC influence by establishing diplomatic relations and expanding other ties with it.

The change in diplomatic relations had political consequences for at least two of the countries making the switch: Panama and the Dominican Republic. In both, the change arguably contributed to the election of new governments. These new governments imposed stricter scrutiny on projects involving China as part of a broader effort to rebalance the relationship with the PRC while maintaining good relations with the United States.

Among the countries that switched diplomatic recognition, the PRC and its companies had significant difficulties in advancing its projects in those countries with strong institutional rules and transparency, including Costa Rica and Panama, encountered significant challenges in advancing PRC projects. Conversely, Nicaragua, an anti-US populist nation, has presented relatively few difficulties for the PRC in advancing its initiatives, including a free trade agreement, yet the Ortega regime in Nicaragua, a politically isolated nation, arguably gained the least from the PRC in exchange for its change in recognition.

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Military

In general, all countries in the region that maintain diplomatic ties with the PRC have engaged in military exchanges. They have sent delegations from their military institutions to the PRC and have received visits from the People’s Liberation Army (PLA). Additionally, some personnel from these countries have traveled to the PRC for training and professional military education (PME). However, countries with closer ties to the United States, such as Colombia under Duque and Brazil under Bolsonaro, have exercised caution to avoid jeopardizing their relationships with Washington by hosting PLA personnel, forces, and Chinese military delegations. In fact, both governments have reversed the policies of previous administrations, including the suspension of invitations to PLA delegations for the Lancero course at Tolemaida Air Base in Colombia.

Regarding military goods, Chinese arms companies have sold or provided a wide range of military equipment to countries in the region. Even conservative regimes, such as the Colombian government under Uribe, have received nonlethal equipment as gifts from China. Chinese donations to military and police forces have been extended to countries across the political spectrum, from left-leaning to right-leaning governments. It appears that smaller and/or underfunded militaries, including those of Guyana and Trinidad and Tobago, as well as Uruguay, have been given priority in receiving such donations.

In terms of arms sales, there is a contrast between donations and purchases, as anti-US populist leftist regimes have taken the lead in acquiring major military equipment from the PRC. Notable examples include Venezuela’s purchase of K-8 fighter aircraft, JYL-1 and JY-27A radars, Ecuador’s acquisition of radars and more than 700 military vehicles, and Bolivia’s procurement of Chinese military helicop-

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57 R. Evan Ellis, “Colombia’s Relationship with the PRC,” Center for Strategic and International Studies, 10 November 2022, https://www.csis.org/.
Argentina, with its Peronist government often aligning with populist ideologies, has bought Chinese armored vehicles and considered purchasing Chinese FC-1 aircraft, which would be the most advanced Chinese combat aircraft sold to the region. However, Chinese arms sales have not been limited to anti-US populist or leftist regimes alone. Peru, for instance, has transitioned from receiving Chinese military trucks as gifts to purchasing Type 90B multiple launch rocket system. In 2014, Trinidad and Tobago obtained a Chinese offshore patrol vessel (OPV). Nevertheless, regimes closely aligned with the United States have generally drawn a distinction between accepting nonlethal items such as Chinese dual-use trucks and engineering equipment, versus purchasing major military equipment directly from the PRC.

There is some evidence to suggest that Chinese military equipment has played a role in maintaining anti-US authoritarian regimes in power. PRC equipment, including VN-4 armored vehicles and other riot control vehicles, has been visibly employed in the repression of Venezuelan protesters on multiple occasions. The purchase of Chinese equipment has also been associated with corruption on several occasions. There have been investigations into alleged kickback schemes involving overpriced vehicles purchased by both the Bolivian and Peruvian armed forces.

Technology Architectures

Chinese technologies, including surveillance equipment, telecommunications, and cloud computing solutions, have been sold to countries across the political spectrum in the region. The rapid expansion of Chinese ride-share company Didi

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Chuxing Technology Company (DiDi) has been most notable in countries where commercial opportunities have been abundant, including Colombia, Panama, Brazil, and the left-oriented Morena regime in Mexico. In contrast, anti-US populist regimes have had limited commercial opportunities for DiDi. The growth of PRC-based e-commerce company Alibaba has followed a similar pattern, as have the decisions made by Huawei regarding the location of its cloud computing sites in Chile, Peru, Brazil (all under center or right-oriented governments during Huawei’s expansion), as well as Mexico and Buenos Aires (under democratic left-of-center governments).67

PRC companies specializing in smart and safe cities architectures have implemented their technologies in various countries, including Argentina and Uruguay, which have left-leaning governments. However, they have also attempted to market their solutions (with limited success) to pro-US right-leaning regimes such as the Iván Duque administration in Colombia.68

It is worth noting that anti-US populist leftist governments have been the primary adopters of Chinese surveillance and control architectures, along with associated digital technologies. Notable examples include the implementation of the “Fatherland Identity Card” by Chinese firm ZTE for Venezuela’s anti-US populist government. This card has been required for various activities, including voting, obtaining scarce food rations, and receiving Chinese and Russian COVID-19 vaccines.69 Other instances include the national surveillance and response systems ECU-911 in Ecuador and BOL-110 in Bolivia. Moreover, Chinese companies played a significant role in developing communication architectures for the Cuban telecommunications company ECTESA, aiding in the digital isolation and censorship of protesters during the Cuban government’s repression of nationwide protests in July 2021.70

**Summary Observations**

The pattern of Chinese engagement with anti-US populist leftist regimes, compared to other leftist regimes and US-aligned center and right regimes, and its impact on democracy and regional dynamics, is complex. Generally, the distin-

guishing factor lies in the quality, rather than the quantity, of engagement. Anti-US populist regimes tend to engage with the PRC in less transparent state-to-state interactions, primarily through loan-based infrastructure projects rather than investments. They also go further than their counterparts in terms of military purchases from the PRC and the implementation of PRC surveillance and control architectures. These architectures, combined with Chinese military and police equipment, assist authoritarian populists to some degree in exerting control over their populations.

On the other hand, there is evidence suggesting that certain countries closely aligned with the United States avoid certain types of economic, military, and technological engagements with the PRC.

Superficial evidence indicates that Chinese firms encounter higher levels of corruption and implementation challenges when operating in anti-US populist regimes. This likely reflects a combination of institutional weaknesses and opportunities for corrupt practices on the Latin American side, as well as the PRC’s inclination to take advantage of such situations to the extent possible.

While Chinese engagement with authoritarian populists appears to contribute to the survival of those regimes through the provision of resources, security, and technological support, it is challenging to determine whether these regimes would have followed a different trajectory without PRC assistance.

The political landscape of Latin America continues to shift toward a higher number of left-oriented regimes. However, the fragility of these regimes, coupled with economic hardships, fiscal constraints, social polarization, and transitions to new governments, threatens to exacerbate political crises and drive extreme government solutions in the region.71

The good news is that the empirical evidence does not suggest an inherent path of PRC engagement that leads at-risk leftist governments toward anti-US populist extremism. On the other hand, it is important to note that the PRC does not possess an inherent strategic interest in promoting or sustaining healthy democratic governments in Latin America if it implies limitations on the PRC’s access to goods, markets, and political cooperation.

The United States, Latin America, and the Caribbean should continue working with the PRC within the framework of transparency, strong institutions, and a level playing field, to promote the region’s economic and democratic health.72

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However, it is crucial not to expect the Chinese to prioritize the interests of partners in the region over their own if those partners are ineffective in governing themselves and pursuing their interests, as the Chinese pursue their own interests in those countries.

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FEATURE

China–Latin America Alignment and Democratic Backsliding

Gaining Traction for a Chinese-Led World Order

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Abstract

In pursuit of its global ambitions, China has increasingly deepened relations particularly with countries in the Global South, leveraging political, economic, diplomatic, and military instruments of power. While these initiatives are well documented, the downstream domestic political effects of these relations remain unclear. In this article, we attempt to fill this gap both quantitatively through a study of the impact of UN General Assembly vote alignment with China on the static and dynamic states of democracy and qualitatively through case studies. In both studies, we consider the Latin American region for several reasons including its coveted natural resources, geographic location/proximity to the United States, and its relative neglect in studies of strategic competition. While we find no relationship between vote alignment with China and democracy in Latin American countries, research illustrates that more widespread engagement with China may provide Latin American countries or leaders with “top cover” to subvert democracy domestically.

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In the past several decades, China has translated its impressive economic growth into a broad spectrum of power, encompassing political, diplomatic, military, and other facets. As China’s power has grown, it has also sharpened its international ambitions, which pose challenges to the United States and run counter to the prevailing liberal international order. To support these ambitions, China has expanded its engagement and interactions with nations worldwide, notably in the Global South, where it claims to share a common narrative.

Notably, Chinese influence is increasingly felt across many nations in Latin America, a region historically regarded as firmly within the United States’ exclusive sphere of influence. Initially, China’s presence in the region primarily revolved around economic matters. However, intelligence sources have disclosed China’s
intentions to expand its military presence in the area, including plans for military and intelligence installations in Cuba and Nicaragua.¹

The surge in Chinese engagement in Latin America coincides with a regional shift away from democracy toward authoritarianism. Leaders of Latin American dictatorships, such as Cuba, Nicaragua, and Venezuela, have steadily consolidated power in the hands of individuals. Additionally, several countries in the region, even those with established or moderate levels of democracy, have faced setbacks in recent years. According to recent Latinobarómetro public opinion polls, there is a persistent decline in support for democracy in Latin America, leading The Economist to assert that the region has witnessed the most significant recession of democracy globally over the past two decades.²

While there is ample documentation of China’s increased involvement and interactions with Latin American nations, the domestic political ramifications of these actions, which in turn could impact international relations and bolster China, remain inadequately understood. This article aims to address this knowledge gap within the context of China–Latin American relations and the erosion of democracy in Latin America. This is particularly pertinent due to the region’s strategic significance, stemming from its valuable natural resources and its geographical proximity to the United States.

This article provides a general overview of China’s overarching international ambitions, as outlined in its National Security Strategy. Subsequently, the article reviews two bodies of literature: one focusing on the causes of democratic backsliding and the other examining the domestic political consequences of international interactions. These sources inform the article’s hypothesis that interactions and alliances with China, a powerful authoritarian global actor, may serve as a catalyst for domestic democratic regression. The article elaborates on this hypothesis and explores potential mechanisms in the third section.

Furthermore, the article introduces various preliminary research methods employed to assess the hypothesis and associated expectations. Specifically, the article’s approach incorporates initial quantitative assessments, including extensive and updated data with meticulous time horizon coding, as well as two distinct case studies focusing on El Salvador and Brazil. The article’s findings do not uncover


strong quantitative evidence suggesting that alignment with China, as gauged by voting records, negatively affects domestic democracy in Latin American countries. Instead, the article observes no discernible quantitative relationship.

Nonetheless, the article’s qualitative case studies suggest that the relationship may possess more substance than our quantitative analysis implies. In particular, the case studies provide preliminary evidence that deepening relations with China, primarily in economic and diplomatic spheres, may empower certain Latin American countries governed by leaders with authoritarian tendencies to undermine democratic institutions. In the case of El Salvador, China’s “noninterference” policy bolsters its increasingly authoritarian leader while eroding Western deterrence against democratic backsliding. Similarly, in Brazil, China’s policy of foreign direct investment, operating under the guise of “noninterference,” fuels authoritarian inclinations, including threats to popular sovereignty and the incitement of violent protests in response to election outcomes. In return, China gains closer political and military alignment in a region of immense geopolitical significance.

While further research is necessary to validate and refine this connection, this article’s initial study underscores the importance of examining it more closely. Intriguingly, the article’s quantitative assessments reveal that alignment with the United States, as measured by voting records, negatively impacts democracy. Numerous potential explanations exist for this relationship, including the possibility of a spurious correlation. Subsequent research should delve deeper into this matter while acknowledging potential policy implications that may arise.

**China’s Global Ambitions and the Role of Developing Regions**

China has long harbored ambitions to restore its power to the levels of its illustrious historical empires. Over centuries, from the Han Dynasty in 200 BCE to the Qing Dynasty in the nineteenth century, China received tribute from neighboring states, amassing vast wealth as the epicenter of East Asian trade. Nevertheless, in the twentieth century, China’s international standing suffered a severe blow during what it refers to as the “Century of Humiliation.” This period was marked by debilitating conflicts, including the Opium Wars, the Chinese Civil War, and the Japanese occupation during World War II. After the Chinese Communist Party (CCP) won the civil war and rose to power, it played Russia and the United States against each other for several decades as China went through several stages of development, including the Four Modernizations, the Great Leap Forward, and a series of international strategies carried on by Mao Zedong and Deng Xiaoping. The pivotal moment came in 1989 with the Tiananmen Square Massacre, which resulted in international condemnation and economic sanctions.
underscoring the vulnerability of the CCP’s grip on power within a US-led liberal world order.

Over time, China recognized the necessity of pursuing industrialized superpower status, regional hegemony, and global influence in an anarchical world. The CCP has meticulously implemented this strategy under successive leaders, from Deng Xiaoping (1978–1991) to Hu Jintao (2002–2012) and finally to Xi Jinping (2012–present).³

In response to challenges such as peasant illiteracy, poverty, fledgling industries, and global competitiveness in the late twentieth century, Deng directed China to “Hide Its Capabilities and Bide Its Time”⁴ while modernizing agriculture, industry, science, technology, and education.⁵ Progress in these areas laid the foundation for China’s rise to prominence, a trajectory inherited by Hu in 2002. Departing from Deng’s cautious approach, Hu, inspired by the 2008 financial crisis and the perceived weakening of US hegemony,⁶ championed a policy of “Actively Accomplishing Something,” which included the pursuit of regional influence.⁷ Hu’s efforts provided the groundwork for Xi’s subsequent policy of “Moving Closer toward the World’s Center Stage,” aimed at propelling China’s global reach and influence.

Central to the CCP’s pursuit of global influence is its relationship with the Global South. This relationship serves multiple purposes: sourcing raw materials from resource-rich regions and exporting processed materials to expand China’s economy; shielding China and friendly autocratic states from Western sanctions; leveraging China’s economic power to exert political pressure globally; and establishing an anti-US coalition to form a Chinese-led international system.

President Xi’s Belt and Road Initiative (BRI) plays a pivotal role in these objectives. The BRI establishes economic ties with the Global South, secures overseas markets, and ensures access to vital natural resources for manufacturing.⁸ The initiative grants China various advantages, including a labor force from China, substantial gains from debt repayment interest, exclusive resource rights, and political leverage. Additionally, it counters US influence by inundating developing

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⁷ Doshi, The Long Game.
markets with competitively priced Chinese exports, including technology and communication infrastructure.\(^9\) However, China’s global presence extends beyond economic realms.

China actively engages in South-to-South partnerships to diplomatically insulate itself from external coercion and augment its relative power by countering the United States’ network of allies.\(^10\) While the US employs its financial systems to isolate dissenting states from global trade, China embraces diverse multilateral efforts that endorse the principle of noninterference, such as BRICS, an association comprising Brazil, Russia, India, China, and South Africa.\(^11\) For instance, throughout the ongoing Russian invasion of Ukraine, the West has condemned Moscow and imposed sanctions on Russia, while the BRICS network maintained engagement with Russia, aligning with the principle of noninterference and nurturing friendly relations.\(^12\)

In response to the Great Recession, China has actively established its own financial systems to counter those of the United States. These initiatives bolster China’s economic autonomy, safeguard against external sanctions, and advance political goals, including the principle of noninterference.\(^13\) The CCP offers generous investments to countries and leaders willing to overlook their involvement in human rights violations and pledge to maintain positive bilateral relations with China.\(^14\) While these investments may seem beneficial to recipient countries and leaders, in practice, they often serve the CCP by undermining democracy, ensnaring recipient countries in debt (referred to as debt-trap diplomacy), and subjecting them to exploitative relationships with China.

While we possess a reasonable understanding of how China engages with the Global South to bolster its global influence, we have limited knowledge regarding

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whether and how these efforts, along with related interactions and alignments, influence domestic politics, particularly a commitment to democracy. Nonetheless, insights can be drawn from two strands of political science literature: one examining the causes of democratic backsliding and the other exploring the effects of international alignments. These insights offer valuable perspectives on what we might anticipate in this complex interplay.

Democratic Backsliding and International Alliances:
What We Know

Democratic Backsliding and Its Causes

Democratic backsliding has become a growing concern globally, capturing the attention of scholars. Much of the research on this subject has been devoted to conceptually dissecting it and examining the various forms it can assume, both in theory and practice. While terminologies may vary, many scholars align with Nancy Bermeo’s comprehensive definition of democratic backsliding as the “state-led debilitation or elimination of the political institutions sustaining an existing democracy.” They have identified instances of this phenomenon in countries spanning from Venezuela to Turkey to Hungary.

However, despite the widespread recognition and concern surrounding democratic backsliding, scholars have made comparatively limited headway in explaining its underlying causes. David Waldner and Ellen Lust’s annual review takes strides in this direction by outlining several theories believed to underlie backsliding. These encompass agency-based theories, theories related to political culture, arguments concerning political institutions, theories rooted in political economy, and theories pertaining to social structure and political coalitions. Waldner and Lust also acknowledge the significance of international factors, positing that international interventions, nation-building through occupation, interactions with the liberal-democratic West (with a focus on leverage and linkage), regional diffusion, participation in international organizations, electoral monitoring, and foreign aid all possess the potential to influence democracy, particularly in the direction of deepening democratic values.

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17 Waldner and Lust, “Unwelcome Change.”
While they do not extensively explore whether and how the converse of these factors might impact democratic backsliding, it remains plausible that they, among others, could indeed have such effects. For instance, rather than contemplating the influence of the liberal, democratic West’s utilization of leverage and linkage to promote democracy in competitive-authoritarian regimes, it is conceivable to investigate a study centered on illiberal, undemocratic China’s use of leverage and linkage to propagate authoritarianism, thereby contributing to democratic backsliding.\(^\text{18}\) This article aims to delve into precisely this aspect. However, before delving into the specifics, we must consider potential insights from the international relations literature to further enrich our understanding and expectations regarding this topic.

**International Alliances and Their Effects**

While the field of international relations traditionally focuses on interactions between states, it has recently embraced the recognition of significant cross-level interactions. It acknowledges that domestic political phenomena possess the potential to shape international interactions. Notably, foreign policy analysis (FPA) exemplifies a “domestic turn” within international relations theory.\(^\text{19}\) This literature, among its various contributions, acknowledges that domestic factors, including the type of political regime and the political ideology of the chief executive, play a role in shaping international alliance formation and the nature of those alliances.\(^\text{20}\)

However, there is a limited body of literature that explores the influence of international factors on domestic politics. Some exceptions to this include Camber Warren’s observation that “states that form international alliances with democratic partners are more likely to develop domestic democratic institutions.”\(^\text{21}\) Warren found evidence that authoritarian countries allying with democratic nations began to adopt democratic characteristics,\(^\text{22}\) and Ronald Rogowski argued that trade has

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\(^\text{22}\) Warren, “Modeling the Coevolution of International and Domestic Institutions.”
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an impact on domestic politics. While these sources do not primarily investigate how foreign politics directly shape domestic politics, they suggest a relationship that this article seeks to expand upon—specifically, the notion that international interactions can influence domestic political outcomes. In the following sections, we delve into this possibility and present a theory outlining the potential ways in which international interactions and alliances can permeate and impact domestic political developments.

A Theory of International Interactions, Strategic Competition, and Democratic Backsliding

As previously discussed in the literature, the democratic West employs leverage and linkage in its dealings with authoritarian states to encourage democratic transitions and consolidation. This article proposes that there are compelling reasons to consider that engagements with the authoritarian CCP could create opportunities for democratic backsliding.

Before China's ascension to global prominence, the Global South heavily relied on the international community championed by the United States for foreign assistance in a broad sense, often accompanied by political conditions. However, in the contemporary multipolar world, there are multiple viable sources of assistance, meaning that countries in the Global South now have alternative options. Consequently, if nations in the Global South find themselves dissatisfied with the aid or the conditions attached to it from the United States and its partners, they possess alternatives with different terms. This environment of “choice” may nurture conditions conducive to democratic backsliding.

Ultimately, as China continues to engage with countries in the Global South to advance its global ambitions, and as the United States endeavors to maintain its status as the preferred partner, there is a growing likelihood of assistance being offered without conditions. This may provide authoritarian leaders in the Global South with the cover needed to undermine democracy and solidify authoritarian rule.

Why Latin America?

It is imperative for research to consider Latin America as an emerging arena of strategic competition between the United States and China for several compelling reasons. Firstly, Latin America holds invaluable natural resources and burgeoning markets crucial for powering the growth of global superpowers. In the early to

mid-2000s, Latin America played a pivotal role in fueling rapid economic growth across emerging markets, notably China, thanks to its abundant commodities such as oil, minerals, metals, and agricultural products. Today, Latin America once again takes center stage in global economic importance due to its critical role in the transition to renewable energy. Countries like Chile, Argentina, and Bolivia, forming “the lithium triangle,” possess over 60 percent of the world’s lithium reserves, a mineral essential for battery production. Brazil alone holds 17 percent of global nickel reserves, while Peru and Chile are the world’s primary copper suppliers.  

Latin America’s significant state ownership of mineral deposits empowers regional governments to make political calculations and assess geopolitical alignments when granting access to these vital resources. For instance, in January 2023, Bolivia granted exclusive lithium mining rights to the world’s largest reserves to Chinese battery corporation CATL, choosing them over US and Russian competitors. This decision follows years of democratic backsliding in Bolivia and a 2019 election that the Organization of American States deemed “impossible to validate” due to “intentional manipulation and serious irregularities.” The leverage that Latin American countries possess in determining which nations can access these critical minerals will play a pivotal role in shaping the outcomes of great-power competition.

Secondly, Latin America’s proximity to the United States has prompted Chinese interest in establishing a physical military presence in the region, potentially contributing to kinetic conflicts. Relations between the United States and Latin American nations, particularly authoritarian states like Cuba, Venezuela, and Nicaragua, are increasingly strained. Recent intelligence has revealed plans for collaboration between China and Cuba, an enduring authoritarian stronghold, to create a joint military training facility, complementing the four joint eavesdropping stations already operating on the island. Additionally, secret negotiations have transpired between China and Nicaragua’s authoritarian President Daniel Ortega to construct a deep-water port off Nicaragua’s coast capable of serving as a naval outpost. The existence and plans for additional Chinese military bases in the

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China–Latin America Alignment and Democratic Backsliding

Western Hemisphere not only directly challenge the United States’ traditional sphere of influence but also threaten its national security, stemming from the vast oceanic buffers that historically separated it from rivals. The presence of a near-peer adversary’s military within a hundred miles of the US coastline would represent the most significant escalation in strategic competition since the Cuban missile crisis of 1962.

Furthermore, it is crucial to consider that Chinese control over Latin America’s critical logistical chokepoints, vital for both commercial and wartime operations, could disrupt the United States’ home front and military capabilities. Latin America serves as a pivotal global economic and military corridor that connects North and South America, as well as the Atlantic and Pacific Oceans through the Panama Canal and the Strait of Magellan. The Panama Canal, in particular, is indispensable to global trade, with more than USD 270-billion worth of goods traversing it annually, serving more than 140 maritime routes to over 80 countries.²⁸ Although the United States ranks as the canal’s largest user, Panama governs the waterway and leases ports to the highest bidder. The rapid expansion of Chinese economic investments in the region creates conditions for a political regime less aligned with U.S. interests, thereby granting greater authority to China. A Hong Kong–based subsidiary already manages two major ports on the Canal’s Pacific and Atlantic outlets.²⁹ Ultimately, the proliferation of Chinese-controlled ports in the region could be leveraged to severely impede US freedom of navigation and hinder military efforts to reposition naval forces to the Pacific during wartime.

Thirdly, the prevailing trend of democratic backsliding in Latin America could disrupt a delicate geopolitical balance and further bolster China’s assertiveness. As previously alluded to in the discussion of BRICs, Latin American countries that are experiencing democratic erosion have increasingly embraced principles of noninterference and nonalignment in support of China’s global aspirations to expand diplomatic partnerships and economic ties. In essence, as the region deepens its relations with China, neutrality increasingly aligns with complicity in international law violations and attacks on democratic institutions. The implications of these shifts, coupled with growing regional diplomatic realignments from Taiwan to China, could have far-reaching consequences, including the potential for a Chinese invasion of democratic Taiwan.³⁰ In essence, there appears to be a

²⁸ “Panama Canal Traffic Along Principal Trade Routes” (Canal de Panamá, 2022), https://pancanal.com/.
²⁹ Daniel F. Runde and Amy Doring, “Key Decision Point Coming for the Panama Canal,” CSIS, 21 May 2021, https://www.csis.org/.
circular, reinforcing, and self-sustaining relationship between democratic backsliding in Latin America and both Chinese empowerment and anti-liberal tendencies on the international stage. In the subsequent sections, we elucidate our unique contribution to our understanding of this relationship, specifically delving into how Latin American alignment with China translates into domestic democratic changes.

**Research Design**

To gain a deeper understanding of how international alliances or “closeness” influence democracy and democratic backsliding within Latin America, this article employs a combination of quantitative assessments and case studies. In its quantitative analysis, this article draws upon data from two key sources: the United Nations (UN) General Assembly Voting Data and the Varieties of Democracy (VDEM) dataset. This approach marks a departure from conventional methods, as the article focuses on noneconomic-oriented international alignments, which are increasingly significant in today’s geopolitical landscape.

To calculate annual proportions of UN General Assembly “voting alignment” between each Latin American country and both China and the United States, we utilized David Robinson and Nicholas Goguen-Compagnoni’s ‘unvotes’ R package. Additionally, we supplemented this data with original coding for the most recent three years (2020–2022). Our analysis covers the time span from 1971 to 2022, aligning with the UN General Assembly’s recognition of the People’s Republic of China and the renunciation of Taiwan in October 1971. To determine voting alignment, we considered UN votes to be “aligned” when: (1) both countries voted “yes,” (2) both countries voted “no,” or (3) both countries “abstained.” This annual proportion of UN General Assembly “voting alignment” serves as our primary explanatory variable, which we also find inherently insightful for our purposes.

From the VDEM dataset, we utilized two established democracy indices: Michael Coppedge and companions’ electoral democracy index and liberal democracy index. These indices enable us to construct measures of democratic backsliding by capturing changes in index scores over 1-year and 5-year periods. Specifically, the article calculates electoral democratic backsliding by subtracting the electoral democracy index values at time $t-1$ and time $t-5$ from the electoral democracy index value at time $t$. Similarly, we compute liberal-democratic backsliding by subtracting the liberal democracy index values at time $t-1$ and time $t-5$ from the liberal democracy

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32 Robinson and Goguen-Compagnoni, “Unvotes.”
China–Latin America Alignment and Democratic Backsliding

index value at time $t$. These measures constitute our primary dependent variable. In addition to informing our primary dependent variable, VDEM provides researchers with several control variables that have the potential to confound our primary relationship of interest. These control variables encompass measures of electoral and liberal democracy (in static form), education, population size, gross domestic product (GDP) per capita, petroleum production per capita, urbanization, and life expectancy. Given their potential to introduce bias into this article’s primary relationship, the authors include these controls in their assessments of the impact of international alliances or “closeness” on democracy and democratic backsliding in Latin America.

To evaluate this article’s primary relationship of interest, the authors employ both basic descriptive analyses and regression models. Initially, the researchers utilize data visualization tools to provide descriptive insights into our primary independent and dependent variables. Subsequently, the authors conduct regression analyses to investigate the potential relationship between these variables. As mentioned earlier, we regress measures of UN voting alignment between Latin American countries and China and the United States (considered separately) on both electoral and liberal-democratic backsliding. Notably, we incorporate lagged values of our primary independent variables to address potential endogeneity concerns, which arise from the possibility that democratic status or backsliding may influence voting alignment in the opposite direction of our hypothesis. While we that endogeneity concerns may persist, we have taken appropriate precautions to mitigate biased estimates. Additionally, our regression models account for various factors that could bias estimates. These models enable us to assess the impact of international alliances or closeness on democratic backsliding.

Acknowledging the limitations of our quantitative analyses and recognizing the value of qualitative insights, we supplement this work with two brief case studies that illustrate the unique dynamics of China’s relationships with specific Latin American countries: El Salvador and Brazil. These case studies provide valuable insights into the primary relationship of interest across countries with differing levels of closeness to China and varying democratic characteristics.

**Quantitative Results**

Figure 1 depicts the UN General Assembly “voting alignment” between each Latin American country and both the United States and China over time, serving as our primary independent variable. Two particularly noteworthy observations emerge from this illustration. Firstly, throughout the observed period, Latin American countries consistently exhibit a greater degree of alignment in their UN General Assembly voting patterns with China than with the United States.
Secondly, the alignment of Latin American UN votes with China appears to exhibit an upward trend over time. Interestingly, these heightened levels of voting alignment and the upward trends in alignment precede the commencement of the significant economic relations between Latin America and China in the twenty-first century. Conversely, while Latin American UN voting alignment with the United States displays fluctuations over time, it generally maintains a relatively stable pattern.

Figure 1. Proportion of UN General Assembly votes aligned between Latin American countries and great powers

Figure 2 shifts the focus to the dependent variable, presenting two measures of political regime change between adjacent years and two measures of political regime change across five-year periods. These calculations are based on both current and lagged values of VDEM’s electoral democracy and liberal democracy indices, as previously described. In this representation, a value of zero signifies the absence of political regime change, negative values denote democratic backsliding, and positive values indicate democratic deepening.

The data reveal that the majority of countries exhibit political regime change values that hover near zero, indicating infrequent short-term political shifts in either a positive or negative direction. While some nations have witnessed minimal political regime change over time, a significant portion of Latin American
countries has experienced abrupt political transformations. As mentioned earlier, the mid-twentieth century saw most Latin American political regime change recorded as negative in terms of measurement values, indicating a shift toward authoritarianism. In contrast, during the late twentieth century, political regime change trended positively in terms of measurement values, reflecting a movement towards democracy.

The dynamics of political regime change in the twenty-first century remains relatively static, but instances of change that have occurred tend to be negative in terms of measurement values, suggesting a regression away from democracy.

Figure 2. Democracy across Latin American countries over time
Figures 1 and 2 play a pivotal role in elucidating two key aspects: the trends in UN General Assembly voting alignment among Latin American countries, China, and the United States (primarily serving as a reference point), and the dynamics of democracy within Latin America, both in its static and evolving forms. However, these figures offer limited assistance in advancing the article’s comprehension of the potential interplay between these two factors. To delve deeper into this relationship, the authors have employed regression analyses.

Tables 1 and 2 present partial output from a series of regression models meticulously designed to gauge the impact of lagged indicators of UN General Assembly voting alignment between Latin American countries and China (Table 1) and the United States (Table 2).

**Table 1. UN General Assembly voting alignment with China and democracy/democratic backsliding in Latin America**

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<th>Elec</th>
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<th>Elec Change (1yr)</th>
<th>Elec Change (5yr)</th>
<th>Lib</th>
<th>Lib</th>
<th>Lib Change (1yr)</th>
<th>Lib Change (5yr)</th>
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</thead>
<tbody>
<tr>
<td>A1. votes China, 1-yr Lag</td>
<td>0.04</td>
<td>-0.00</td>
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<td>A1. Votes China, 5-yr Lag</td>
<td>0.06 *</td>
<td>-0.07</td>
<td>0.04</td>
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<tr>
<td>R2</td>
<td>0.94</td>
<td>0.94</td>
<td>0.02</td>
<td>0.18</td>
<td>0.95</td>
<td>0.95</td>
<td>0.04</td>
<td>0.10</td>
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</table>

*** p < 0.001; ** p < 0.01; * p < 0.05.
The findings presented in Table 1 indicate that, for the most part, recent levels of UN General Assembly voting alignment with China do not exhibit significant associations with either political regime type or democratic backsliding, irrespective of the VDEM measures employed. An exception to this overarching observation is found in Model 2, which suggests that UN General Assembly voting alignment with China five years prior is linked to an increase in subsequent levels of electoral democracy in Latin American countries.

The models presented in Table 2 mirror those in Table 1, with the additional inclusion of explanatory variables related to UN General Assembly voting alignment with the United States. Table 2 affirms the primary conclusions drawn from Table 1 regarding the largely nonsignificant impact of UN General Assembly voting alignment with China on democracy and democratic backsliding in Latin America. However, the data also reveal that UN General Assembly voting alignment with the United States one year prior is associated with a decrease in subsequent levels of both electoral and liberal democracy in Latin American countries. Interestingly, this alignment’s impact is not observed when examining a five-year lag. In terms of democratic backsliding, the results are more consistent. UN Gen-

### Table 2. UN General Assembly voting alignment with China and the United States and democracy/democratic backsliding in Latin America

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<th>Elec</th>
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<th>Elec Change (1yr)</th>
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<th>Lib2</th>
<th>Lib Change (1yr)</th>
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<tr>
<td><strong>A1. votes China, 1-yr Lag</strong></td>
<td>0.00</td>
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<td><strong>A1. votes China, 5-yr Lag</strong></td>
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<tr>
<td><strong>A1. votes US, 1-yr Lag</strong></td>
<td>-0.01**</td>
<td>-0.01**</td>
<td>-0.01***</td>
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<td><strong>A1. votes US, 5-yr Lag</strong></td>
<td>-0.01</td>
<td>-0.03**</td>
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<td><strong>N</strong></td>
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<td>464</td>
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<tr>
<td><strong>R2</strong></td>
<td>0.94</td>
<td>0.94</td>
<td>0.06</td>
<td>0.11</td>
<td>0.95</td>
<td>0.95</td>
<td>0.06</td>
<td>0.11</td>
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</tbody>
</table>

All continuous predictors are main-centered and scaled by 1 standard deviation.

*** p < 0.001; ** p < 0.01; * p < 0.05
eral Assembly voting alignment with the United States, both one year and five years prior, increases Latin American countries’ tendencies toward democratic backsliding, as measured by both electoral and liberal democracy indices.

While a comprehensive exploration of the underlying factors behind this unexpected outcome falls outside the scope of this article, we later highlight some potential limitations of our research and suggest avenues for future investigation. For now, we transition to two qualitative case studies that offer further insights into the article’s primary research focus.

Case Studies

El Salvador

El Salvador, under President Nayib Bukele, presents one of the most concerning recent cases of democratic backsliding in Latin America. China’s substantial economic investments in El Salvador underpin a departure from democratic principles and human rights violations.

President Bukele’s election in 2019 marked the beginning of an unprecedented consolidation of executive power and systematic violations of human rights, characterized by attacks on the independence of the military, legislature, and the judiciary. In February 2020, lacking the majority control needed to pass funding for his Territorial Control Plan, Bukele entered the legislative chamber with armed forces personnel, surrounded by thousands of supporters, and issued an ultimatum to the National Assembly. Following legislative control obtained in the 2021 election, the Bukele-controlled Assembly replaced the Attorney General and all five members of the Constitutional Chamber of the Supreme Court of Justice. In sum, the use of intimidation within the legislative branch and the appointment of loyalists within the justice branch resulted in a decline in democratic and human rights safeguards in El Salvador. The de facto permanent state of emergency against gang violence, ongoing since 2022, has enabled the arbitrary and inhumane detention of thousands, suspending various constitutional rights, including the presumption of innocence and the right to a defense.

According to Zaira Navas, the legal director of Cristosal, an El Salvadoran human rights organization, there is sufficient evidence to try El Salvador for crimes against humanity in the Inter-

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national Criminal Court due to “systematic torture” against alleged gang members detained under El Salvador’s state of exception. This includes the deaths of at least 160 people in prison, accompanied by widespread cases of beatings, malnutrition, and overcrowding.\textsuperscript{35}

While the United States strongly criticized the Bukele administration’s deviation from international law and democratic principles, its pressure is significantly blunted by China’s expansion of foreign direct investment in El Salvador. For instance, in response to US Vice President Kamala Harris’ public criticism of the National Assembly’s vote to remove constitutional court judges, President Bukele responded by stating, “with all due respect: We’re cleaning our house . . . and that is none of your business.”\textsuperscript{36} This response echoes China’s traditional appeal of “noninterference” in internal affairs and demonstrates the direct influence that Beijing’s investments have in El Salvador. As previously discussed, the flexibility resulting from the current great-power competition between the U.S. and China allows certain states that do not wish to maintain the democratic conditions attached to aid from the United States to turn to China instead. Therefore, in 2018, El Salvador received USD 150 million in initial investments from China to switch its diplomatic alignment from democratic Taipei to authoritarian Beijing.\textsuperscript{37} China’s spending spree in El Salvador, coinciding with President Bukele’s domestic dismantling of democratic institutions, included a Confucius Institute at the University of El Salvador, water treatment plants in Ilopango and La Libertad, construction of a large national library, a sports stadium, and partial funding for President Bukele’s USD 200-million “Surf City” project.\textsuperscript{38} These high-profile public projects serve to elevate Bukele’s populist persona, following the CCP’s authoritarian model. China’s economic investment in El Salvador enhances President Bukele’s cult of personality while simultaneously reducing the threat of U.S. sanctions. Consequently, despite a “pause in relations” with Washington, President Bukele enjoys widespread public approval, generally exceeding 80 percent.\textsuperscript{39} In June 2023, Bukele announced his bid for re-election, in violation of a constitutional presidential term limit. If he wins, he


will be the first president in El Salvador since 1944 to be re-elected and serve multiple terms.

**Brazil**

Brazil, one of the most powerful democracies in the Southern Hemisphere and South America, faces potential challenges to its democratic progress due to regional conflicts and international pressures from the People’s Republic of China, highlighting the risk of democratic backsliding.\(^40\) China's influence underscores the fragility of Brazil's democracy, evident in Brazil’s interest in China-led regional blocs aimed at challenging the existing liberal international systems and domestic political turmoil following the election of Luiz Inácio “Lula” da Silva.\(^41\)

Lula seeks to expand Brazil’s global influence, viewing the nation as a hegemon within South America. His vision was apparent during his first two presidential terms from 2003 to 2010 when he played a key role in establishing the BRICS geopolitical bloc (comprising Russia, India, China, and South Africa) as a counter to the prevailing liberal international world banking systems. This historical context sheds light on Lula's contemporary priorities for Brazil. Notably, Lula recently offered to mediate a peace agreement between Russia and Ukraine, facing criticism for his perceived naïveté on the international stage. In contrast to his predecessor, Jair Bolsonaro, who delayed meeting with Chinese Premier Xi Jinping until six months after his inauguration in June 2019, Lula engaged in a bilateral summit with Xi in April 2023. This signals a deepening of ties between Brazil and China, emphasizing Brazil’s receptivity to direct engagement with China and its pursuit of a “nonaligned and noninterventionist” global stance.\(^42\)

The deepening Sino-Brazilian relations, particularly within BRICS, provide Brazilian politicians with cover to undermine democracy domestically. While BRICS initially focused on economics, it has evolved into a geopolitical bloc with the aim of reshaping the prevailing liberal international world order. Leaders within BRICS, including Lula, have criticized Western-led financial institutions like the International Monetary Fund (IMF) and the World Bank for linking financial investments to democratic commitments.\(^43\) However, this stance isolates Brazil


\(^42\) “Brazil’s Foreign Policy Is Hyperactive, Ambitious and Naive,” The Economist, 10 April 2023, https://www.economist.com/.

from democratically aligned nations and shields its leaders, including Lula, from international accountability mechanisms designed to prevent corruption and interference in democratic institutions. Historical precedent, such as the 2005 “Mensalão” corruption scandal, illustrates the vulnerability of Brazilian democracy without robust international safeguards. Therefore, threats to democracy in Brazil are likely to persist and even proliferate in the absence of such protections.

The root cause of this democratic instability lies in the deepening bilateral relationship between Brazil and China, both diplomatically and economically. This growing entanglement coincides with significant upheaval in Brazil’s democracy, including Operation Car Wash in 2013, the election of President Bolsonaro and a wave of conservative/right-wing leaders in 2016, an assassination attempt on Bolsonaro in 2018, the shift back to the left with Lula’s election in 2022, and the storming of Brasilia on 8 January 2023. Collectively, China’s increasing influence in Brazil through economic and diplomatic interactions undermines Brazil’s democratic stability and provides political cover to anti-liberal politicians, solidifying the country’s alignment with a Chinese-led world order.

Conclusion

In 2023, China’s emergence as a global power is undeniable. While we are gaining a clearer understanding of China’s overarching international objectives and the various tools it employs to achieve them, there remains limited insight into how interactions or alignments with China impact domestic politics, specifically in terms of political regimes. This article seeks to offer an initial assessment to address this knowledge gap. Our quantitative analysis indicates that alignment with China, particularly in the form of UN votes, does not appear to lead to domestic democratic backsliding. However, our case studies provide a more nuanced perspective on the potential relationship between alignment with China and democratic backsliding, suggesting that other forms of alignment—primarily economic and diplomatic—are more plausible factors contributing to the observed democratic decline in twenty-first-century Latin America.

Future research should delve into these possibilities, exploring questions such as: Does economic alignment with China erode democracy in Latin American nations? Does diplomatic alignment with China undermine democracy in Latin American nations? While our case studies offer preliminary indications that the

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answer to both questions may be affirmative, further investigation is necessary for confirmation. Additionally, future research should assess our interpretation that it is not necessarily strategic competition-driven concessions that foster democratic backsliding, but rather that aligning with China on the international stage provides cover for leaders in the Global South to subvert democracy.

Beyond its academic significance, unraveling these questions holds critical insights essential for preserving democracy and the liberal world order in an era marked by strategic competition. ☘

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Dr. Kelly Piazza (Senters) is an Associate Professor of Political Science at the United States Air Force Academy and a participant in the Aspen Strategy Group’s Class of 2023 Rising Leaders Program. She received her B.A. from Lafayette College in May 2013 and her Ph.D. from the University of Illinois at Urbana-Champaign in August 2018. Dr. Piazza specializes in comparative politics and studies gender, corruption, crime, political regime transitions, the political economy of development, civil-military relations, and strategic competition both in Brazil and in the broader Latin American region. She has published on these topics in *World Development*, the *Latin American Research Review*, and *Latin American Politics and Society*, among other outlets, and the Lemann Foundation, the Tinker Foundation, the United States Departments of Education and Defense have supported her professional development and research.

Cadet Max Lasco
Cadet Max W. Lasco is a second-class cadet at the United States Air Force Academy majoring in Foreign Area Studies and minoring in both Chinese and Spanish. Cadet Lasco follows his father and grandfathers by attending the academy and serving in the Air Force. Since graduating as the class president of an international high school in Houston, Texas, Cadet Lasco has been passionate about languages and international affairs. He currently studies at La Escuela Militar de Aviación in Cali, Colombia for a semester exchange. He is also a recipient of the Stamps Scholarship, which enables him to pursue cross-regional research on the topic of US-Taiwan-China diplomatic competition in Latin America.

Cadet Jacqueline Kelly
Cadet Jacqueline Kelly is a senior at the United States Air Force Academy. She is majoring in Foreign Area Studies-Political Science with a Chinese minor. C1C Kelly hopes to be selected for pilot training and sometime in her career become a Foreign Area Officer. Her academic interests include Chinese foreign policy, military strategy, Chinese history, and Great Power Competitions.

Cadet Harvey Regin
Cadet Harvey Regin was born and raised in Dallas-Fort Worth, Texas, and entered the Air Force Academy in June of 2020. Her goal in life is to manipulate U.S.-Sino relations in a favorable way for the United States of America, both in peacetime and in war. C1C Regin is on track to complete her B.S. in Foreign Area Studies-Political Science with a language minor in Mandarin Chinese in May 2024, with the end goal of becoming a Foreign Area Officer. Her interests include real estate investment, Great Power Competition, Chinese foreign policy, Chinese domestic politics, and military strategy.
China–Latin America Alignment and Democratic Backsliding

Cadet Joncarl Vera
Cadet Joncarl “JC” Vera is a first-class cadet at the United States Air Force Academy. He is majoring in Foreign Area Studies with a focus on the Latin American region via a Political Science track with a language minor in Portuguese. He is on track to receive his B.S. from the United States Air Force Academy in May 2024, where he aspires to be a pilot in the United States Air Force. JC’s interests include great power/strategic competition in the Latin American and Caribbean (LAC) region and military affairs in the United States and LAC region. His academic interests have taken him across the world to include academic immersion trips to the Cambodia, Vietnam, Honduras, and Washington D.C, where he interned for the William J. Perry Center for Hemispheric Defense Studies.
Lessons in the Dragon’s Lair

The People’s Liberation Army’s Professional Military Education Engagement with Latin America and the Caribbean

MAJ MATTHEW A. HUGHES, US ARMY

Abstract

The People’s Liberation Army’s (PLA) engagement in professional military education (PME) with Latin American and Caribbean (LAC) countries has experienced significant growth in terms of participants, course offerings, and subject matter. This expansion can be attributed to China’s security cooperation policy, increased investment, and evolving political dynamics in the region. By analyzing government publications from China, the United States, and LAC countries, along with secondary sources on security cooperation, and theses of Latin American officers who studied at PLA academic institutions, this article aims to examine the development of China’s PME efforts in the region, identify emerging trends, assess their effectiveness, and consider the implications. While existing research on Chinese security cooperation in LAC primarily focuses on areas such as military sales, equipment donations, exercises, and key leader engagements, this article sheds light on the often-overlooked field of PME, which has seen significant attention from China.

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Despite professional military education (PME) engagements constituting one method “where China has been most aggressive” in enhancing security cooperation, research on China’s efforts in Latin America and the Caribbean (LAC) has predominantly focused on other aspects such as foreign military sales, equipment donations, exercises, and key leader engagements, rather than PME.¹ PME encompasses “a progressive education system that prepares leaders for increased responsibilities and successful performance at the next higher level by developing the key knowledge, skills, and attributes they require to operate successfully at that level in any environment.” This includes personnel exchanges and training at military academic institutions.² This article analyzes the progression of the People’s Liberation Army PME efforts

in this LAC region, identifying trends, assessing effectiveness, and exploring potential implications.

While China has consistently donated military equipment throughout the region, these efforts have generally fallen short in advancing technical interoperability. The equipment provided often proved to be initially inoperable or quickly became so due to issues of poor quality, logistical challenges, and Chinese failures to provide necessary training and maintenance. Furthermore, there have been limited opportunities to employ this equipment in bilateral exercises. In contrast, PME holds the potential to enhance human and procedural interoperability through relationship-building and the sharing of doctrines. It also facilitates the establishment of enduring placements and access through personal associations. In terms of the Ladder of Military Cooperation, PME is an efficient means to advance partnerships, as it is a confidence-building measure (Stage 1) through academic engagement, justifies mechanisms of regular consultations (Stage 2) to establish and renew exchanges, and enables military-technical cooperation/personnel exchanges (Stage 3) (see fig. 1).³

China’s PME outreach in the region is much stronger than in years past. This is largely due to investments in PME programs and expansion of Spanish-language capabilities.⁴ This topic is a noted intelligence gap as smaller embassies “are not staffed to closely track and evaluate Chinese and other adversary outreach through programs like PME exchanges, so they may not even be aware of the shift in relative participation and influence.”⁵

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⁴ Campbell et al., *U.S. Resourcing to National Security Interests*, 45.

How has the PLA’s professional military education with Latin America and the Caribbean evolved since 2000? This study demonstrates the growth and broadening of the PLA’s PME relationship with LAC countries in terms of participants, courses, and subject matter. This expansion can be attributed to Chinese security cooperation policy and priorities, increased Chinese investment, and political changes in LAC. This article comprises several sections that delve into different aspects of the topic.

First, the article investigates Chinese defense policy on LAC and formal bilateral agreements, aiming to understand how PME factors into Chinese strategic approaches to achieve national priorities in the region. Next, the focus shifts to examining the participants involved in PME engagements, encompassing countries, overall numbers, ranks, and occupational specialties. Then, the article explores the content of PME, analyzing the courses offered and the academic institutions involved. This analysis seeks to uncover the focus areas, identify any omitted topics, and explore potential implications. Next, the discussion centers on funding sources for bilateral PME engagements and examines the returns on investment for China. Lastly, the conclusion presents potential implications of Chinese PME efforts in the region and outlines areas for further research.
Chinese Policy and Formal Agreements

Chinese policy documents and white papers prioritize the use of PME to strengthen defense ties with LAC countries. The expansion of the PLA’s PME engagements has been facilitated by an increasing number of formal bilateral agreements. China’s first policy paper on LAC published in 2008 emphasized that “the One China principle is the political basis for the establishment and development of relations” with LAC countries.6 This principle not only affects political and economic relations but also extends to military relations, explaining the absence of Chinese PME exchanges with countries such as Paraguay that still recognize Taiwan as a sovereign nation. Notably, China’s “PME outreach and professional exchanges reach every LAC country that officially recognizes Beijing.”7

The evolving political dynamics in the region and the increasing alignment of more countries with Beijing on the One China principle have resulted in the expansion of China’s PME influence, facilitated by the emergence of new bilateral agreements. The 2008 policy paper expressed the intention to actively engage in military exchanges, defense dialogues, and cooperation with LAC countries, stipulating that China would “actively carry out military exchanges and defense dialogue and cooperation” and that “personnel exchanges will be enhanced” and “professional exchanges in military training, personnel training and peacekeeping will be deepened.”8

China’s second policy paper on LAC, published in 2016, reiterated and expanded upon the content of the first policy paper. It emphasized military exchanges and security cooperation activities as means to strengthen defense ties.9 Additionally, the document listed UN peacekeeping and cooperation in humanitarian relief as areas for exchanges, which subsequently witnessed increased PME engagements in the following years.10

7 Robert G. Sutter, Chinese Foreign Relations, 5th ed. (Lanham, MD: Rowman & Littlefield, 2021), 298, as paraphrased in Campbell et al., U.S. Resourcing to National Security Interests, 45. Seven of the thirteen countries in the world that still recognize Taiwan as a sovereign nation are in LAC: Belize, Guatemala, Haiti, Paraguay, Saint Kitts and Nevis, Saint Lucia, and Saint Vincent and the Grenadines.
8 China’s Policy Paper, part IV, sec. 4, para. 1–3.
10 The policy paper was published on 24 November 2016, in the wake of the Battle of Juba in South Sudan (7–11 July 2016), for which Chinese peacekeepers were criticized for allegedly abandoning their posts. The LAC region has a variety of peacekeeping educational and certification centers operated by military units, which also emphasize joint operations—a priority for the People’s Liberation Army since the 1990s. On this,
Three white papers published by the State Council Information Office of the People’s Republic of China (PRC) and one by the Ministry of National Defense of the PRC also mentioned the region and provided some additional insights into the intended role and application of PME. *China’s National Defense in 2010* explained that “China conducts military exchanges with developing countries in . . . Latin America,” and that “China continues to host workshops for senior officers from countries in Latin America [and] the Caribbean.”* China’s Military Strategy* (2015) simply stated that China will “continue the traditional friendly military ties with . . . Latin American . . . counterparts.”* China’s National Defense in the New Era* (2019) mentioned aspects of PME and highlights that “China is strengthening military exchanges with developing countries in . . . Latin America [and] the Caribbean . . . by carrying out personnel training, conducting exchanges between mid- and junior-level officers, and providing assistance in military development and defense capabilities.”* The Diversified Employment of China’s Armed Forces* (2021) described PME in relation to the PLA’s contributions to humanitarian assistance and disaster relief efforts. It highlighted demining assistance in Latin American countries through training courses, the PRC’s equivalent of mobile training teams, and the donation of demining equipment. While the white papers did not establish policy for the region, they illustrated some ways in which China has operationalized policy guidance regarding PME.

Over the past two decades, China has gradually established formal agreements that incorporate PME with several LAC countries. One approach China has employed to advance PME in this region is through bilateral defense cooperation agreements (DCA). These are “formal agreements [that] establish broad defense-oriented legal frameworks between signatories, facilitating cooperation in . . . fundamental areas,” including military education.

China has signed a series of military agreements with Venezuela under the Maduro regime, historically focused on science, technology, and research and de-

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In 2015, military leaders of both countries convened in Caracas to review existing agreements and explore the potential of “expanding military cooperation beyond the technical field, to include education.”16 As part of the defense talks, a visit to the Venezuelan Military University took place, emphasizing the significance of military education.17

Military education also took center stage in China’s DCA with Bolivia, signed in 2016. During the agreement signing, Bolivia’s minister of defense highlighted China’s military support to Bolivia’s armed forces, particularly grants to attend military institutes.18 Uruguay, in late 2022, became the most recent LAC country to ratify a DCA with China. The agreement lists various methods of cooperation, including the exchange of instructors and students from military institutions.19 DCAs and bilateral defense talks serve as foundations for long-term PME relationships and necessitate additional agreements to codify conditions for PME exchanges and training.

Among relevant formal agreements, there are arrangements between Chinese and LAC military academic institutions that specifically address PME, albeit with narrower scopes. For instance, the PLA National Defense University (NDU) has “contacts with over 140 foreign militaries [and] maintains regular interactions and cooperation with prominent military academic institutions in over ten countries. The PLA NDU has also signed formal interuniversity exchange and cooperation memos with foreign military academic institution[s], including the National Defense University of the United States.”20 These arrangements generally specify numbers and ranks of military students, list courses in which they enroll, outline funding sources, and specify the duration of the agreement.

An example of such an arrangement exists between the National Defense University of Argentina and the PLA NDU. This arrangement involves a “strategic cooperation program” with China, which includes a course on Argentina-China

17 Li, “China, Venezuela to bolster military, technical cooperation.”
cooperation. The enrollment in this course doubled in 2020 compared to the previous year.\textsuperscript{21} In addition, “China has received students from the program on visits to China and, reciprocally, has sent its own staff to attend courses at the institution in Argentina.”\textsuperscript{22}

The details of these arrangements are rarely publicly accessible, which limits our understanding of the parameters, funding, and intent behind China’s PME efforts. However, occasional mentions of bilateral PME engagements by Chinese and LAC governments, along with insights from other government reports and documents, offer glimpses into the nature of some of these bilateral relationships and help us understand how they have evolved.\textsuperscript{23}

\section*{PME Participants}

In terms of the sheer number of LAC participants in Chinese PME and vice versa, increasing values reflect greater Chinese investment and prioritization since the PRC’s 2008 policy paper. While China had conducted some PME exchanges with LAC countries before that period, there is limited information available in government-released articles highlighting specific engagements. The PLA National Defense University had the most active program in the 1990s, receiving field grade officers (major to colonel ranks) from over 40 countries, including some from LAC.\textsuperscript{24} Chile began sending officers to the school in 1997 but does not currently conduct this exchange, while Uruguayan officers began attending in 2009, around the same time when a broader range of students from across LAC started participating.\textsuperscript{25} It appears that DCAs have served as catalysts enabling the establishment and expansion of Chinese PME efforts in the region, with many agreements being signed after China’s 2008 policy paper.

Brazil’s National Defense White Papers from 2012 and 2016 provide useful insights into the number of Brazilian Army personnel participating in military education abroad and foreign army personnel attending military education in

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\textsuperscript{22} Ellis, “La profundización del compromiso chino-argentino.”

\textsuperscript{23} Chinanews.com regularly publishes articles on bilateral engagements with LAC countries. Details sometimes include numbers and ranks of personnel involved, training or discussion topics, locations, and future plans.


\textsuperscript{25} Graceffo, “La diplomacia de la defensa.”
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Brazil. Such figures for most countries are often challenging to find in the public domain. Between 2001 and 2011, there were 70 US Army personnel in military education programs in Brazil, compared to six PLA personnel in Brazil, resulting in a ratio of 12:1.\textsuperscript{26} During the same timeframe, Brazilian Army personnel in military education programs in the US totaled 171, while there were only seven in China, resulting in a ratio of 24:1.\textsuperscript{27} In 2015, Brazilian Army military education programs hosted three US Army personnel, compared to five PLA personnel.\textsuperscript{28} Likewise, 38 Brazilian Army personnel studied in US military education institutions that year, whereas only four studied in China.\textsuperscript{29} The overwhelmingly strong bilateral relationship with the United States is closely tied to the longstanding practice of annual Army-to-Army Staff Talks, which began in 1984. These talks establish successive engagements and codify the number of slots open to each partner for various courses. Brazil’s increased engagement with China, as indicated by the numbers from 2015, is also indicative of the PLA operationalizing policies and guidance to strengthen ties through bilateral activities in PME.

Throughout LAC, the disproportion in PME figures between the United States and China has grown. By 2015, “China for the first time trained more Latin American military officers than the United States, and the difference [grew] every year,” at least through 2019 and possibly beyond.\textsuperscript{30} During a congressional hearing in January 2020, Admiral Craig S. Faller, the Commander of US Southern Command, highlighted that the number of LAC students attending the Chinese war college exceeded five times the number attending the US war college.\textsuperscript{31} This growing disparity was exemplified during the hearing by the case of El Salvador, where China offered 50 PME exchange opportunities compared to only one slot in the US International Military Education and Training (IMET) program.\textsuperscript{32}

China’s PME engagements encompass various seniority levels and ranks, with the highest engagement observed among field grade officers and the least among noncommissioned officers (NCO), as per available open-source information. At the

\begin{footnotesize}
\textsuperscript{32} US Senate, United States Africa Command and United States Southern Command.
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general/flag officer level, most PME engagements involve seminars or delegation visits to military academic institutions, which lay the groundwork for future exchanges. A notable example occurred in 2015 when PLA General Liu Yuejun, Commander of the Lanzhou Military Region, visited Venezuela to review several agreements and explore the potential expansion of PME engagements. During the visit, General Liu and his delegation also visited the Venezuelan Military University.

LAC general/flag officers occasionally visit China to attend seminars and tour military institutions. For instance, in 2018, the Brazilian Army sent the Head of its Army Doctrine Center to Beijing, Baotou, and Nanjing, China for such a visit. More recently, on June 5, 2023, a delegation of 18 PLA officers, led by General Zheng He (Commander of the PLA NDU) visited the Brazilian Army Headquarters in Brasilia and National War College (Escola Superior de Guerra) in Rio de Janeiro.

These engagements often serve as precursors to the expansion of PME exchanges. Senior leaders visit military institutions, observe instruction, meet with institutional leadership, interact with their country’s students attending those schools, and identify and prioritize opportunities. In some cases, they may even sign memorandums to establish the framework for future exchanges.

Based on open-source information, the majority of the PLA’s PME engagements with LAC countries primarily involve field grade officers. Since the 1990s, the College of Military Instruction for Foreigners at the PLA NDU, widely regarded as China’s premier military education center, welcomed students from over 40 countries worldwide. Among them were field grade officers from LAC countries, including Bolivia, Chile, Colombia, Cuba, Ecuador, Mexico, Peru, Uruguay, and Venezuela. Strong activity at that institution has continued to the present with an even broader range of countries sending students.

Personnel from LAC countries, including Colombia, Ecuador, Peru, Uruguay, Venezuela, and others, have continued to attend courses on national security, strategic studies, and other relevant topics at the National Defense University. While

33 Li, “China, Venezuela to bolster military, technical cooperation.”
34 Portaria No. 1,677 (5 October 2018), https://bdex.eb.mil.br/. Of note, this Brazilian Army officer had extensive foreign assignments and travel in his military assignments. He served as the Brazilian Army’s Liaison Officer to the US Army Combined Arms Center and editor-advisor of the Brazilian edition of Military Review in Fort Leavenworth, Kansas, as explained in his author biography in Military Review, https://www.armypress.army.mil/, and later as the Deputy Chief of Staff of the Brazilian Army, as explained in his official service biography, http://www.embrmil.br/.
36 Xu, “Un lugar de encanto excepcional.”
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the PLA NDU has remained a prominent venue for PME engagements with LAC countries, increased investment and formal agreements have facilitated exchanges with other PLA institutions.37

The Army Command College of the Chinese People’s Liberation Army, situated in Nanjing and one of 12 Army institutions in China, houses a Foreign Military Student Department that has hosted several field grade officers from various LAC countries, including Brazil, Colombia, Peru, Barbados, and Jamaica.38 With few exceptions, the Brazilian Army has sent at least one field grade officer to the Command and General Staff Course each year since 2008.39 Similarly, the Peruvian Army assigned two field grade officers to attend the course in 2016-2017, followed by three more in 2020-2021.40 Officers from Uruguay and Venezuela have frequently participated in the course, which offers the opportunity to earn a Master

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38 Following the 2017 restructuring throughout Chinese PME institutions, the following 12 institutions constituted Army institutions among the PLA’s 37 academic institutions: Army Command College, Army Engineering University, Army Infantry College, Army Academy of Armored Forces, Army Academy of Artillery & Air Defense, Army Aviation Academy, Army Special Operations Academy, Army Academy of Border and Coastal Defence, Army Institute of NBC Defence, Army Medical University, Army Logistic University, and Army Military Transportation University. On this, see Allen and Chen, The People’s Liberation Army’s 37 Academic Institutions, 51 and Table 48. On countries that have sent students, see Graceffo, “La diplomacia de la defensa”; and Leo Ivar Flores Jr., “La Estrategia de Defensa Nacional de Brasil y las oportunidades de Cooperación con China [Brazil’s National Defense Strategy and Opportunities for Cooperation with China],” no. 67 (thesis, Senior Command Course, Defense Studies Institute, National Defense University, China, 27 June 2018), 17, https://bdex.eb.mil.br/.


of Military Science. Chinese field grade officers have also attended the CGSC course in Rio de Janeiro, Brazil.

In addition to courses at the PLA National Defense University and Army Command College, LAC field grade officers have participated in seminars, training sessions, and exchange events related to PME. As part of its Study Tour of Brazilian Senior Officers, the Brazilian Army has sent colonels to Beijing, Shanghai, Hangzhou, and Nanjing. Field grade officers from LAC countries have also taken part in the Latin American Training Course on Humanitarian Assistance and Disaster Mitigation, lecture events in Nanjing, the National Military Security and Command Course in Changping, and the High Symposium of Latin American and Caribbean Military Officers. These engagements have involved visits to Beijing, Xi’an, Wuhan, and Shanghai. Regarding courses held in LAC, Chinese field grade officers have attended the Language Center of the Army in Rio de Janeiro for language instruction. They have also participated in the International Cyber Defense Course in Brasilia.

To a lesser extent, China has engaged with army company grade officers (lieutenant to captain) and cadets in early PME courses. This includes technical training, such as short courses for junior officers at the Nanjing International Medical Center. In addition to field grade officer students, the PLA’s NDU also integrates cadets into courses and exchanges. According to a PLA news report from August 2018, the institution “has trained in recent years over 500 foreign military cadets from over 100 countries [worldwide].” The Army Engineering University in Nanjing frequently hosts foreign junior officers and cadets, having welcomed approximately 100 foreign military delegations. This institution “has had regular exchanges with 14 foreign military elite schools,” including the US Military Academy and the British Royal Military Academy. The PLA Army Infantry College also receives foreign armies’ “company and platoon-level military officers,

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42 Flores, “Las Oportunidades de Cooperación con China,” 17.
45 Flores, “Las Oportunidades de Cooperación con China,” 17.
47 Allen and Chen, The People’s Liberation Army’s 37 Academic Institutions, 40.
48 Allen and Chen, The People’s Liberation Army’s 37 Academic Institutions, 54.
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along with their staff officers.”49 A reciprocal exchange between the Brazilian Army’s Jungle Warfare School in Manaus and the jungle operations school in Guangzhou, China, featured specialty instruction. In 2016, China sent instructors to assist with training in Brazil, and Brazilian jungle instructors traveled to China to train 67 Chinese cadets.50

Competitions serve as a frequent form of engagement for PLA academic institutions. The Army Engineering University in Nanjing has participated in 10 consecutive Jingwu Cup competitions, which often feature competitors from LAC countries. Additionally, they have taken part in the US Military Academy’s Sandhurst Competition.51 The Army Academy of Artillery and Air Defense of China also dispatched a cadet team to compete in the international Patrol Competition held in Chile in 2017.52 Another notable forum for PME engagement is the recurring International Week of Chinese Army cadets, which has drawn the participation of LAC countries traveling to China.53

Chinese PME engagements with LAC countries are seemingly lacking in the NCO corps. Within the PLA’s own ranks, NCO access to PME “is a deficiency [it] has sought to address in recent years,” and this shortfall extends to international military education engagement at this rank level.54 Since 2009, PLA NCOs have been required to earn technical certifications for rank advancement, which seems to be emphasized more than leadership training. According to available information, the PLA’s PME efforts involving LAC NCOs primarily focus on technical training rather than leadership instruction.55 Publicly accessible information on the PLA’s PME efforts involving LAC NCOs is limited, but engagements seem to follow this trend of focusing on technical training rather than leadership instruction. Technical training has incorporated soldiers from LAC countries to an extent, such as a group of 20 Ecuadorian officers and soldiers that participated in courses on “military strategy and command, acupuncture, and special combat” at the Land

50 Flores, “Las Oportunidades de Cooperación con China,” 17; Swami de Holanda Fontes, “Potenciales estratégicos de Brasil y China: Oportunidades de integración entre los dos Países [Strategic possibilities for Brazil and China: Opportunities for integration between the two countries],” no. 64 (thesis, Senior Command Course, Defense Studies Institute, National Defense University, China, 18 May 2017), 15, https://bdex.eb.mil.br/.
55 Tetreau, “The PLAs’ Weak Backbone.”
Forces Infantry Institute in Shi Jia Zhuang in 2008. Bilateral engagements with LAC countries also extend to specialty courses like jungle training.

**PME Content**

The curriculum of courses and training in China’s PME engagements with LAC countries has evolved over time, driven by technological advancements, significant reorganizations within PLA institutions, and increased Chinese investments in PME outreach. The duration of academic and training courses in China can vary from weeks to more than a year. Some courses offered by China “focus on the operation and maintenance of Chinese military equipment sold to LAC countries,” while others “introduce foreign students to PLA military thought regarding operations and leadership or Chinese military doctrine.”

In the early 2000s, the College of Military Instruction for Foreigners at the PLA National Defense University consisted of three sections. These sections included a one-year course aimed at training officers from Western Asia, North Africa, and coastal areas of the Pacific Ocean, which was generally taught in English. There was also a five-month course designed for field grade officers, which was taught in English, French, Spanish, and Russian. Additionally, there was a month-long research course on international problems taught in English and Chinese. The curriculum of these courses focused on five key areas. These areas encompassed the history and culture of China, military thought from Sun Tzu’s *The Art of War* to modern theory and tactics, research on strategic problems and the national defense system, technical skills in mission command, and China’s military capabilities and national defense construction.

In June 2017, the PLA implemented a “massive reorganization” of its academic institutions, resulting in the reduction of “the number of officer academic institutions from 63 down to 34 and NCO institutions from four to three.” Technological advancements drove curriculum changes in technical schools, while reorganization efforts and outreach initiatives influenced the curriculum and structure of leadership courses and higher-level educational institutions.

At the PLA National Defense University’s International College of Defense Studies, which hosts foreign military officers, advanced studies (five months), defense research (one year), and an international affairs seminar (one month) are

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56 Embassy of the People’s Republic of China in the Republic of Ecuador, “Intercambio militar.”
58 Xu, “Un lugar de Encanto excepcional.”
59 Xu, “Un lugar de Encanto excepcional.”
now offered.\textsuperscript{61} The university also confers masters and doctoral degrees and issues graduate-level certificates. As of April 2018, the university had trained 5,844 graduate students, including 236 foreign graduate students.\textsuperscript{62} The curriculum typically covers Chinese Military Thought, including Sun Tzu’s \textit{The Art of War} and other works, strategy and geopolitical studies, and international security studies.\textsuperscript{63}

While some courses aim to expose LAC military students to Chinese doctrine, it has been observed that “the war college course on offer in China [is] in actuality a copy of US doctrine translated into Spanish.”\textsuperscript{64} This may be attributed, at least in part, to gaps in Chinese doctrine and joint-level operations. Another area with gaps and weaknesses is peacekeeping. Both of China’s 2008 and 2016 policy papers on LAC highlighted peacekeeping as a focus topic for strengthening security cooperation ties. However, this is an area where China has historically lacked experience and credibility, primarily due to a lack of combat experience since the 1979 conflict with Vietnam.\textsuperscript{65}

To address this gap, dozens of the PLA National Defense University’s “teaching and research officers have participated in international peacekeeping and served as military observers.”\textsuperscript{66} While Chinese troop contributions to United Nations peacekeeping missions have increased, the 2016 Battle of Juba in South Sudan remains a significant event that undermines the credibility of Chinese peacekeeping efforts. Chinese peacekeepers faced sharp international criticism for their actions in this incident, as The Center for Civilians in Conflict (CIVIC) published a report in early October 2016 stating that “Chinese peacekeepers with the United Nations Mission in South Sudan (UNMISS) had withdrawn from a civilian protection zone in July after coming under attack.”\textsuperscript{67}

\textsuperscript{61} Allen and Chen, \textit{The People’s Liberation Army’s 37 Academic Institutions}, 37.
\textsuperscript{62} Allen and Chen, \textit{The People’s Liberation Army’s 37 Academic Institutions}, 38.
\textsuperscript{63} Renato Laguna Aschiero (n.d.), Home [LinkedIn page], LinkedIn, https://www.linkedin.com/.
\textsuperscript{64} US Senate, United States Africa Command and United States Southern Command, as paraphrased in Campbell et al., \textit{U.S. Resourcing to National Security Interests}, 46. “Chinese military theory from the 1990s forward posits that joint operations are the ‘basic form’ of war,” and “Chinese professional military education materials make clear that China has absorbed lessons learned from U.S. performance in contemporary conflicts and harnessed those insights to shape its development of a joint reconnaissance-strike capability,” as set forth in Burke et al., \textit{People’s Liberation Army Operational Concepts}, 5, which paraphrases Michael S. Chase, Cristina L. Garafola, and Nathan Beauchamp-Mustafaga, “Chinese Perceptions of and Responses to US Conventional Military Power,” \textit{Asian Security} 14, no. 2 (2017), 5.
\textsuperscript{65} Michael S. Chase et al., \textit{China’s Incomplete Military Transformation: Assessing the Weaknesses of the People’s Liberation Army (PLA)} (Santa Monica, CA: RAND Corporation, 2015), 52, https://www.rand.org/.
\textsuperscript{66} Allen and Chen, \textit{The People’s Liberation Army’s 37 Academic Institutions}, 40.
Despite these challenges, China has sought to incorporate peacekeeping into PME engagements. For instance, the National Defense University’s International College of Defense Studies organized the second International Defense Forum in Beijing in June 2019, with the theme “New Changes in the Form of War, New Challenges of Peaceful Development.” One of the forum’s three major topics was “The Ways to Resolve Conflicts and Maintain World Peace, the Plans: China’s Plan, and the World’s Plan.”

Values appear to be an area that is not adequately addressed in Chinese PME instruction. The curriculum and organization of PLA academic institutions often diverge from certain traditional Western values. Professional military education plays a crucial role in instilling institutional values in troops, including foreign students who benefit from exposure to societal values during their time abroad. However, it seems that the PLA curriculum for foreign students in PME lacks coursework on topics such as ethics, democracy, and human rights, despite the Chinese government publishing white papers on these subjects.

In contrast, partner nation attendees of the Western Hemisphere Institute for Security Cooperation at Fort Moore, Georgia, are required to attend courses on these three topics. Among codes for level-1 and level-2 specialties, uniform for all Chinese academic institutions—those affiliated and not affiliated with the military—there is a code for “Ethics” (伦理学). The Army Medical University, an academic education and professional education institution located in Chongqing, has 20 identified teaching and research labs, one of which is on “Ethics and Law” (伦理学与法学教研室). There is no evidence to suggest that democracy, human rights, or ethics beyond the scope of medical care are addressed in the curricula, research specialty areas, or other materials available on these institutions’ websites and publications.

Although philosophy is commonly listed as an educational focus area, which may include discussions on values, the curricula lack specific details. It is evident that any values discussions would greatly contrast with traditional American values. Specialty codes related to philosophy include “Philosophy of Marxism,” “Chinese Philosophy,” and “Foreign Philosophies,” indicating a potentially antagonistic ap-

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68 Allen and Chen, *The People’s Liberation Army’s 37 Academic Institutions*, 41. This source explained that senior-level military officers from 88 countries participated in the International Defense Forum.

69 The State Council Information Office of the PRC has published or shared a variety of white papers or reports on related topics, including *China: Democracy That Works* (4 December 2021) and *New China Research’s Pursuing Common Values of Humanity – China’s Approach to Democracy, Freedom and Human Rights* (7 December 2021). On this, see https://english.www.gov.cn/.


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proach despite the possible presence of a foreign audience in military academic institutions. Additionally, at China’s National Defense University, specialty areas under the subject of jurisprudence include “Marxist Theory” and “Basic Principles of Marxism.”

Military students from LAC attending courses in China would likely be aware of the threats to democracy posed by the PLA’s influence in academic institutions and their collaboration on military and security-related science and technology research. Several Chinese academic institutions, including the PLA National Defense University and Army Medical University, are categorized as “very high” risk in the China Defence Universities Tracker by the Australian Strategic Policy Institute’s International Cyber Policy Centre. This tracker serves as a tool to aid in the due diligence of entities considering engagements with Chinese entities and “aims to build understanding of the implications of China’s expanding military-civil fusion in the global education sector.” The tracker incorporates research on human rights abuses and espionage.

These concerns are also associated with intellectual property theft, which China exploits to drive innovation and reduce costs in research and development. China’s activities in emerging domains like cyber create a sense of distrust in collaboration and exchanges with the PLA.

Returns on Investment

China acknowledges the success of the US IMET program and seeks to emulate its achievements in military education and international engagement. The IMET program, funded by the Department of State, exemplifies the whole-of-government approach in strategic competition, even in the realm of PME. It has demonstrated enduring presence in partner nations, enhanced interoperability, and fostered relationships between US service members and foreign counterparts, yielding unparalleled influence. Participants in the IMET program not only gain doctrinal knowledge and cultural understanding through coalition operations but also cultivate lasting friendships with their US and foreign counterparts, which can have significant strategic impact.

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73 The Army Medical University is designated very high risk “for work on biological sciences for the military,” as explained in Australian Strategic Policy Institute, “Army Medical University,” 18 November 2019, https://unitracker.aspi.org.au/.
75 Posture Statement of Admiral Craig S. Faller, Commander, United States Southern Command, before the 116th Congress, Senate Armed Services Committee, 30 January 2020, 4.
An illustrative example is the case of Haiti in 1991, where the democratic election of Jean-Bertrand Aristide was followed by a coup. In 1994, a diplomatic delegation led by President Jimmy Carter, including former Chairman of the Joint Chiefs of Staff General Colin Powell, convinced the military junta led by General Joseph Raoul Cédras to peacefully step down and restore power to Aristide. General Powell’s personal relationship with Cédras, which originated when Cédras was a student at the United States’ School of the Americas, “served to convince the junta to give up power peacefully.”  

As one officer put it, “the cost of such long-term benefits from these types of programs ... is ‘peanuts’ in comparison to other DoD managed programs and justifies increased IMET opportunities.”  

China has increased its investment in PME outreach and incentivized LAC countries to engage in PLA PME by covering expenses, aiming to emulate and compete with the proven returns on investment of the US model. As the PLA offers to cover expenses, “LAC governments are often open to accepting any ‘free’ training, and officials that receive perks, such as traveling with their families, have proven to be enthusiastic students.”  

stronger impression on foreign military students, “Beijing also pays for [them] to travel in business class, stay in five-star hotels, and have other expenses paid for them while in China—none of which are generally offered through US programs.”  

China regularly covers the costs for LAC students to attend courses at the PLA’s NDU, Army Command College, and other sites for leadership and technical courses, exchanges, or conferences.  

China also hopes that positive feedback from LAC students, along with other factors such as political conditions, will foster stronger defense ties with LAC countries. Regarding this, the Argentinian Ambassador to Beijing, Sabino Vaca Narvaja, addressed managers of 21 military academic institutions in LAC in June 2023 on the topic of security cooperation with China, emphasizing the importance of the PRC’s unconditional cooperation in the defense industry of LAC countries.  

China views such investment as one method to cultivate guanxi—a Mandarin term meaning connections or relations, and in reference to military engagements, an

77 Campbell et al., U.S. Resourcing to National Security Interests, 46.
78 Campbell et al., U.S. Resourcing to National Security Interests, 46.
79 Campbell et al., U.S. Resourcing to National Security Interests, 46.
81 "Vaca Narvaja fue distinguido como profesor honorario de la Universidad de la Defensa china [Vaca Narvaja was distinguished as an honorary professor of the Chinese Defense University],” telam digital, https://www.telam.com.ar/.
art that “places an emphasis on the binding power and emotional and ethical qualities of the personal relationships.”\textsuperscript{82} This concept, which permeates Chinese culture, involves cultivating strong personal connections that lead to obligations and exchanging favors, and its influence extends to PME.

Due to the natural career progression and timeline of officers, it is premature to fully understand and assess the PLA’s increased focus on PME with LAC countries in recent years and how it has fostered connections with senior military leaders in the region. On occasion, LAC students who study in China have also attended US PME courses, providing a level of equivalence in foreign experience and military thought (depending on the course). This is exemplified by Ecuadorian Army Brigadier General Delgado Salvador Henry Santiago, the Director of the Ecuadorian Army’s military academy (\textit{Escuela Superior Militar “Eloy Alfaro”}), who attended the Signal Captains Career Course in the United States and CGSC in Nanjing.\textsuperscript{83}

Foreign language presents a limitation to the returns on investment in Chinese PME engagement with LAC countries compared to the United States. While PME courses attended by LAC students in the US are predominantly conducted in English, with some offered in Spanish, most courses in China are also conducted in English or Spanish, without any requirement for Chinese proficiency. For example, China’s National University of Defense Technology requires English proficiency for all 41 specialties, and the Army Engineering University requires English proficiency for all 32 specialties.\textsuperscript{84} While this practice encourages more LAC students to attend courses in China, it does not address the foreign language challenges that would arise in training and exercises, limiting the potential for greater interoperability at higher levels of military cooperation.

Furthermore, there is limited potential for increased procedural interoperability in strategic studies when the war college curriculum in China is a replica of that in the United States. In contrast, in mid-career US PME courses such as the Command and General Staff Officers Course, foreign students often write monographs or theses on topics specific to their own countries and armed forces, applying doctrine and coursework to explore new approaches and solutions. In PLA academic institutions, monographs and theses written by military students from LAC predominantly focus on areas of mutual interest and seek to identify opportunities to deepen ties at the national and strategic levels of engagement. For instance, a senior


\textsuperscript{84} Allen and Chen, \textit{The People’s Liberation Army’s 37 Academic Institutions}, 47 and 58.
field grade officer from the Brazilian Army studying at the PLA National Defense University wrote his thesis on security cooperation opportunities between Brazil and China. He identified opportunities based on mutually beneficial strategic goals, including subject matter expert exchanges and discussions on various fields such as fires warfighting, special operations, psychological operations, cyber defense, electronic warfare, peacekeeping operations, and chemical, biological, radiological, nuclear, and high yield explosives.85

A high-ranking Brazilian Army officer at the PLA National Defense University wrote his thesis on the development of Brazil’s defense industry and opportunities for China. He emphasized the lack of bilateral defense agreements despite common interests in this strategically important area. According to him, strategic defense projects are crucial for the development of the Brazilian defense industry, and he highlighted the potential for Chinese companies to share technology and supply materials, parts, and equipment for Brazilian companies involved in modernization projects.86 In addition, another Brazilian Army officer discussed recent bilateral DCA, highlighted PME exchanges, and expressed Brazilian interest in learning about nuclear security and cyber defense from China.87

**Conclusion**

The PLA’s PME engagement with LAC countries has expanded in scope and numbers since 2000, driven by China’s increased investment and focus on PME. Chinese policy documents prioritize PME in the LAC region, leading to the signing of DCAs to facilitate exchanges and training. The number of LAC military students in China has grown steadily and, in some cases, surpassed those in the United States. However, Chinese PME courses lack instruction and discussions on values that are fundamental to US PME.

One implication of political trends in LAC is that Chinese PME will likely be one of the first types of security cooperation engagement China seeks as countries align with the One China policy and sever ties with Taiwan. For instance, China may soon engage in PME with Honduras, which established diplomatic relations with Beijing in March 2023. Greater Chinese investment in LAC PME necessitates that the United States fills course billets offered by partner nations, as China

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85 Flores, “Las Oportunidades de Cooperación con China,” 18–19.
87 de Holanda Fontes, “Potenciales estratégicos de Brasil y China,” 15.
Lessons in the Dragon’s Lair

aims to seize any vacancies. The United States should prioritize IMET to enable LAC countries to send officers and soldiers for PME in the United States.

Furthermore, increased Chinese PME exchanges in emerging domains like space and cyber heighten the likelihood of Chinese foreign direct investment and infrastructure projects in LAC, which could lead to PLA presence and cooperation in these areas. This raises concerns about the erosion of values related to authoritarianism, privacy, and democracy as the state gains more control. Another implication of China-LAC PME is the progression up the ladder of defense cooperation. Depending on favorable circumstances, including political administrations in certain LAC countries and Chinese participation in exercises, bilateral cooperation could increase.

One potential avenue for further research is conducting a comprehensive study on the monographs and theses written by LAC field grade officers. Due to limited access to digital libraries and restricted public library access in many LAC countries, it may be challenging to gather data. However, examining thesis topics, findings, and recommendations could provide valuable insights into relevant research areas and potential opportunities for security cooperation.

In addition, a study on LAC participants in Chinese PME programs could offer valuable insights. This research could shed light on the career progression and roles of these individuals, as well as how they apply their education from China in their assignments. Analyzing their contributions in areas such as doctrine development, research and development, strategic projects, or international relations would provide insights into how LAC countries value and leverage the education of those who studied in China.

Furthermore, there is limited information available regarding Chinese PME efforts involving NCOs. Exploring this area would be worthwhile to understand how China engages LAC NCOs in military education, the nature of their involvement, and the objectives of the exchanges or programs.

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Strategic Health Diplomacy in the Indo-Pacific

A Comparative Analysis of US and Chinese Efforts in Latin America and the Caribbean

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Abstract

This article analyzes the healthcare diplomacy rivalry between the United States and China in Latin America. Since the 1980s, the US Southern Command has employed medical outreach programs to counter Soviet influence and improve regional stability. Initiatives like New Horizons/Beyond the Horizons missions and embedded health engagement teams have demonstrated the US commitment.

China, meanwhile, has made significant inroads with COVID-19 aid, investments, and medical teams embedded in partner-nation hospitals, notably in Barbados. The article underscores the need for the United States to bolster global health engagements with dedicated funding, leverage military residency training, and expand public affairs campaigns to maintain its leadership in healthcare diplomacy. Failing to do so risks ceding influence to China and jeopardizing regional stability.

Beginning in the 1980s, USSOUTHCOM actively deployed engineering and medical teams in Central America. The US military, while countering Soviet communist influence, recognized an opportunity to enhance regional stability and dominate security cooperation. Providing medical and surgical expertise to rural communities, alongside substantial donations of medical supplies, granted the US government access, influence, and positive publicity that furthered its regional security interests.

Today, USSOUTHCOM has refined its healthcare engagement strategy. The medical element at Joint Task Force Bravo in Honduras continues delivering routine medical and surgical care. Annual deployments of US Navy hospital ships consistently capture attention and convey a robust humanitarian message. Additionally, the US Air Force employs embedded health engagement teams (EHET), integrating joint military teams directly into partner-nation hospitals and clinics.
for extended periods, yielding positive impacts on local healthcare capacity and readiness training—a win for all stakeholders.

The US military is not alone in utilizing healthcare for security cooperation. The People’s Republic of China actively participates in this domain, notably in the Caribbean, with embedded engagements at a national-level Barbados hospital, significant investments in Suriname’s healthcare infrastructure, and the deployment of its hospital ship. These developments underscore the significance of healthcare diplomacy in our strategic competition with China.

**US Military–Global Health Engagement**

From the outset, medical outreach programs provided healthcare services across Central America, eventually adopting the name New Horizons/Beyond the Horizons. These humanitarian missions organized health fair-style events in rural communities, offering outpatient medical, optometry, and dental care. For instance, during a three-week period in the spring of 2018, USSOUTHCOM’s New Horizons mission in central Panama attended to 7,500 patients and distributed 1,400 eyeglasses. Army veterinarians administered treatment to 1,185 animals, primarily performing spaying and neutering procedures. Concurrently, ophthalmology and ear, nose, and throat (ENT) surgeons were embedded in a local hospital, restoring sight and hearing to 315 patients.2

Despite the dissemination of anti-US propaganda leading up to these missions, a dedicated public affairs team countered these narratives through 50 radio and television interviews and the publication of 22 articles, which were widely covered by Panamanian and international media outlets. These narratives resonated with local citizens, host-nation political and ministerial leaders, as well as US military commanders, highlighting the universal appreciation for efforts to provide medical and surgical care, treat diseases, distribute eyeglasses, and address dental issues.

Recently, the region has witnessed the emergence of a less glamorous yet potentially more sustainable and impactful approach to global health engagement (GHE): the deployment of EHETs. Under this operational concept, small teams of military medical professionals seamlessly integrate into a host nation’s healthcare system, encompassing a wide range of disciplines and specialties aligned with the desired outcomes of key stakeholders such as the host-nation ministry of health, the US Embassy country team, and US military medical planners. This GHE model

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aims to deliver patient care within the framework of the country’s own healthcare system, benefiting its human resource capacity and ultimately enhancing patient outcomes.

In early 2023, Air Forces Southern (AFSOUTH), the air component of US-SOUTHCOM, executed the Lesser Antilles Medical Assistance Team (LAMAT) operation with this concept in mind. A general surgery and dental team seamlessly integrated themselves into the healthcare systems of Suriname, Guyana, and St. Lucia. At an operational cost of USD 1.4 million, 29 military medical professionals delivered USD 2.9 million in healthcare services to more than 1,100 patients. These professionals engaged in daily activities shoulder-to-shoulder with host-nation surgeons, doctors, nurses, and dentists. The surgical teams, in particular, collaborated on complex cases that neither team could have handled independently. Together, they provided treatment, alleviated human suffering, and improved the healthcare system, benefiting both the host nations and the United States.³

The most renowned medical outreach mission in the USSOUTHCOM region is the USNS Comfort hospital ship. Originally a supertanker, it was converted in 1987, replacing oil tanks with surgical suites to support various US military operations (including Desert Shield, Desert Storm, and Operation Iraqi Freedom) and international and domestic humanitarian assistance/disaster response (HADR) missions (such as Haiti’s massive 2010 earthquake and Hurricanes Katrina and Rita).⁴ In 2007, the ship gained iconic status when it commenced port calls throughout the USSOUTHCOM region under a HADR campaign known as Continuing Promise. Without uttering a word, the USNS Comfort hospital ship boldly signaled the presence of medical aid and humanitarian assistance, courtesy of the United States military.

As recently as 2022, during Continuing Promise’s twelfth iteration, the USNS Comfort made port calls to five countries in Latin America. These visits included nearly 300 surgical procedures and the dispensing of over 34,000 prescription medications by healthcare providers and pharmacists.⁵ These medical engagements not only saved lives but also provided substantial opportunities for diplomatic engagement, contributing to the development of social capital among leaders at all levels of the security cooperation landscape.

Strategic Health Diplomacy in the Indo-Pacific

People’s Republic of China Health Engagement Efforts

The US security cooperation community has observed with a mixture of curiosity, interest, and concern the entry of the Chinese government into the realm of health diplomacy in Latin America. Throughout the COVID-19 pandemic, Chinese officials donated equipment, personal protective gear, and extended loans for Chinese-made vaccines. This foothold has opened significant foreign investment opportunities. For instance, the Chinese pharmaceutical giant, Sinovac, committed to constructing a USD 100-million vaccine plant in Bogotá. The intent to incorporate healthcare-related capabilities into China’s Belt and Road Initiative is evident, with China even referring to it as part of the “Health Silk Road.” This strategic move may serve to rebuild reputational trust that has been tarnished by debt-trap dynamics resulting from large-scale infrastructure projects.

COVID-19 initiatives marked the latest step in China’s foray into healthcare infrastructure. In early 2020, China donated USD 28 million to the government of Suriname to establish the Wanica Regional Hospital, addressing a pressing need for the underserved population on the outskirts of Paramaribo. During the donation ceremony, the Chinese Ambassador asserted it was the “largest donation ever made to the Surinamese government by China” and the most significant project between the two nations since establishing diplomatic relations nearly half a century ago.

While China has not yet dispatched large groups of medical professionals to provide care in rural communities, it has initiated the deployment of teams of doctors and surgeons to embed themselves in partner-nation hospitals. Anecdotal accounts from deployed US military personnel consistently report a Chinese presence in emergency rooms, internal medicine wards, and surgical operating theaters in hospitals across Central and South America, as well as the Caribbean.

A noteworthy and publicly documented example of embedded Chinese medical teams can be found at Queen Elizabeth Hospital (QEH) in Barbados. Commenc-

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9 “Regional Hospital Wanica Enters First Phase,” (Google translation from the original Dutch), StarNieuws, 8 February 2020, https://www.starnieuws.com/.
10 “Regional Hospital Wanica Enters First Phase,” StarNieuws.
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ing in 2016 through a memorandum of understanding signed by the Chongqing Health Commission, multidisciplinary medical and surgical teams began rotating for extended periods at QEH.¹¹ While not a military medical team, the diplomatic and security cooperation objectives align. This relationship has even facilitated reciprocal visits for Barbadian physicians to Chongqing Medical University.¹² Published news articles about these visiting Chinese medical teams convey positive sentiments. The Barbados government acknowledges their contribution in clearing surgical backlogs and suggests improved competencies among their staff. Moreover, their presence facilitates ongoing medical equipment donations, including ophthalmological cameras, anesthesia machines, and ventilators.¹³ Nevertheless, it remains unclear to what extent these teams have integrated into the QEH system, or if integration is even their primary goal. As of the latest information available, there have been at least five rotations of Chinese teams at QEH.¹⁴

In 2011, a watershed moment occurred in Chinese healthcare power projection. The citizens of Latin America looked out on a blue-ocean horizon and saw a hospital ship bearing the familiar red cross. However, this ship did not sail under a US flag. These Latin American countries welcomed instead, for the first time in the region’s history, a Chinese military ship called the Peace Ark.¹⁵ Although such hospital ship deployments by China in the region have been infrequent, they served as a prescient reminder of the significance of health diplomacy and as a wake-up call for USSOUTHCOM to continue leveraging its historical advantages in this sphere.

**Conclusion: Strategic Competition through Health Engagement**

What should we make of the efforts by both the US and China in the USSOUTHCOM region? US military medical teams have consistently executed these highly popular missions for many decades. These GHE activities leverage deep cultural and linguistic ties shared throughout the Americas and the Carib-

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¹⁴ Alexander T. Wald, Regional China Officer for the Caribbean, interview with the author, US Embassy in Barbados, 1 October 2021.
bean. They facilitate the development of enduring professional and personal relationships, promote a shared understanding of health and medicine in the region, and foster a sense of unity against common disease threats.

However, the costs remain high, leading to persistent questions about their utility and benefits. There is no dedicated funding mechanism earmarked specifically for these GHE activities. Consequently, all resource requests operate on a zero-sum basis, forcing leaders at various levels of the Departments of State and Defense, and even within Congress, to make choices between supporting GHE activities and allocating resources to other priorities.

Furthermore, GHE activities are not a panacea for diplomatic challenges. Even though military medics have delivered millions of dollars in healthcare over the years, some countries in the hemisphere have withdrawn their diplomatic support and recognition of Taiwan. In the ongoing strategic competition with China, this represents just one aspect of the diplomatic landscape. Nonetheless, it underscores the complexity of diplomatic challenges in the region, where military GHE activities are just one element in a larger strategic game.

As China continues to construct hospitals and vaccine production facilities in South America and integrate medical teams into Caribbean healthcare systems, the Chinese government and military are gradually undermining a key area of US influence. USSOUTHCOM Commander, General Laura Richardson, has observed that China is positioning itself in the “red zone” of US influence, skillfully wielding soft power across the Western hemisphere. To counter this assertive activity, I propose three actions for the US government and military:

1. Adequately fund and integrate military GHEs into strategic plans. Congress should establish a dedicated GHE funding authority within the National Defense Authorization Act. Ringfencing these funds would enable combatant commanders to establish a more regular and enduring medical security cooperation presence. GHE planners could then develop cohesive plans for deploying medical capability predictably, ultimately leading to genuine healthcare capacity enhancement. This predictability would also facilitate better interagency integration.

2. Leverage military residency training requirements to advance security cooperation objectives. In November 2022, USSOUTHCOM (and its subordinate unit, Joint Task Force Bravo) signed a memorandum of understanding with the Defense Health Agency’s San Antonio Market to deploy emergency medicine faculty and residents to Central America. Multiple rotations have since occurred, establishing a sustained presence in at least one Honduran hospital. Accumulating data on this experience shows promising initial
results. Combatant commands should allocate resources and promote the expansion of such models in the coming fiscal years.

3. Expand public affairs campaigns associated with GHEs. Medical events generate positive public sentiment toward the US military presence in the region, making these stories a valuable social capital investment. Military and diplomatic leaders can then draw on this social capital during combat-related training activities vulnerable to misinformation campaigns. We must aggressively share these stories through innovative means, beyond social media and published articles. This entails embedding public affairs teams in more medical engagements, producing video documentaries and other novel media products, and even involving US and foreign news correspondents in our medical teams, thus broadening the reach of our information operations.

Failure to maintain US leadership in healthcare diplomacy would needlessly squander a 50-year head start in regional medical security cooperation. Ensuring proper funding for an expanded GHE presence, coupled with diversified media channels, will enable the United States to sustain or even enhance its lead in this competitive arena. We must continue to wield the powerful lever of goodwill to fortify regional stability, foster partnerships, and bolster America’s positive influence in the region.

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Not an Away Game

US Strategic Competition in America’s Own Neighborhood

WALTER H. WARD, JR.

Abstract

US security challenges have historically been framed in terms of North and South, but the focus shifted to East and West after World War II. The concept of “East” encompassed Eastern Europe or the Middle East, while today it includes challenges in the Far East under Indo-Pacific Command (INDOPACOM). However, strategic competition is now closer to home, necessitating a new approach.

The United States has asymmetric means to secure victories in strategic competition in Central and South America. This article examines China’s influence in the region, identifies key players, and highlights areas where the US holds a competitive advantage. Urgent action is needed to ensure strategic competition remains an away game. By providing strategic recommendations, this article aims to help the US achieve a mutually beneficial outcome while safeguarding its long-term interests.

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Since the Civil War, US security challenges have traditionally been expressed in terms of North and South, but from World War II onward, the prevailing focus has shifted to the East and West. Eastern Europe and the Middle East were defined as the “East,” while today, US Indo-Pacific Command (INDOPACOM) challenges are framed as the Far East. For nearly a century, an ocean, both literal and figurative, has separated the homeland from strategic competitors in this East-West orientation. However, the landscape has undergone a significant transformation.

Strategic competition is now much closer to home and no longer lurking beneath the surface. Chinese and Russian influence in Central and South America has become highly visible, as they strive to create political, economic, and social divisions between the US and its regional partners. Their motives are neither altruistic nor mutually beneficial, but rather part of a deliberate strategy to enhance their own power while undermining US influence and diverting attention away from distant shores.

Fortunately, the United States possesses asymmetric means to effectively secure victories in strategic competition within Central and South America, enabling success in the long run. The key lies in people—the fundamental building blocks of the endeavor. The United States Air Force, leading the way in force development
within the Department of Defense, is equipping its personnel with language and cultural skills suited for the present mission. This article delves into the ways China influences military and economic affairs in Central and South America. More importantly, it provides recommendations where the United States holds a distinct asymmetric competitive advantage and emphasizes the need for swift action to ensure strategic competition returns to its status as an away game.

By exploring these dynamics, this article aims to rebalance the playing field and provide strategic recommendations that enable the United States to secure a mutually beneficial outcome while safeguarding its interests in Central and South America.

**China’s Stealthy Military Influence in Central and South America**

China has silently pursued a long-term strategy of exerting influence over the militaries of Central and South America. In a thought-provoking piece for the Center for International Maritime Security, Capt Steven Arango, USMC, highlights China’s growing influence achieved through investments in officer professional military education. Drawing upon a RAND report, Arango reveals that China provides a staggering five times more opportunities for professional military education than the United States, and this disparity continues to widen each year.¹

The concerns raised by Arango are echoed by John S. Van Oudenaren and Benjamin E. Fisher, who emphasize China’s investment in professional military education across Central and South America. Referring to a 2010 news article from Xinhua News Agency, Van Oudenaren and Fisher disclose that China had already educated over 4,000 officers from more than 150 countries by that time.² However, they caution that the mere provision of seats in courses does not guarantee sustainable integration or operational capability. Their research uncovers a striking disparity—while international students are exposed to Chinese history and culture, including a shared narrative of European colonial exploitation, they are segregated into separate international cohorts rather than being fully integrated with their People’s Liberation Army counterparts. This stands in stark contrast to the experience at institutions such as Air University and other service professional military education establishments, where international officers are fully integrated alongside their US colleagues.³

³ Van Oudenaren and Fisher, “Foreign Military Educations as PLA Soft Power.”
In US professional military education institutions, the United States actively facilitates the unrestricted integration of international students by providing a baseline of English language skills. This invaluable gift opens doors for these students to fully participate in classes alongside American and other international students—a gift that keeps on giving in many ways. However, a stark contrast emerges when examining the experience of international officers attending Chinese Defense Studies campuses.\(^4\)

No similar effort is made to support the integration of international officers within the Chinese system. Instead, they are segregated into classes conducted in their native language, limiting direct engagement with their Chinese counterparts. Moreover, the instruction and materials largely reflect official Chinese Communist Party (CCP) positions, rarely allowing for diverse perspectives.\(^5\) The disparity could not be more pronounced when compared to the experience of attending professional military education at a US institution. As both a student and instructor, I have witnessed and participated in numerous spirited discussions between US and international officers, fostering a deeper understanding of challenges and strengthening relationships.

Despite the disparity in educational quality, China is undeniably providing greater quantity in terms of educational opportunities. However, upon returning to their home countries, these officers bring with them connections and ideologies that tangibly extend the reach of Chinese influence, reaching right to our own doorstep. By widening the gap between our relationships with our closest neighbors, China gains a strategic competition advantage as the visiting team, while our ability to deter their malign influence in INDOPACOM is compromised.

This stark juxtaposition highlights the importance of addressing the approach to international military education. It is imperative that the United States not only maintains its commitment to unrestricted integration but also expands its efforts to counter the widening influence of China. By strengthening relationships, deepening understanding, and offering a competitive educational experience, the US can effectively navigate the evolving landscape of strategic competition in our own backyard.

### China’s Economic Infiltration

China is also actively pursuing a similar path economically, making significant strides in Central and South America. Data from the House Foreign Affairs Com-

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\(^4\) Van Oudenaren and Fisher, “Foreign Military Educations as PLA Soft Power.”

\(^5\) Van Oudenaren and Fisher, “Foreign Military Educations as PLA Soft Power.”
mittee reveals that while Mexico and Canada remain the US’ top trading partners, China has successfully penetrated these regions, with trade increasing by a staggering 26-fold between 2000 and 2020. Moreover, projections indicate that this growth will double by 2035. These gains are not surprising when considering the substantial political investment made by President Xi Jinping. Since assuming office in 2013, President Xi has visited Latin America on 11 occasions, in stark contrast to the mere five US Presidential visits to the region documented in Department of State historical records up until 25 October 2022.

Beyond the numerical figures lies a more concerning trend of vertical integration, wherein China strategically acquires key industries rather than solely purchasing their products. The House Foreign Affairs Committee highlights that China has invested a staggering USD 16 billion in Argentina, Chile, and Bolivia’s lithium production industry. Furthermore, China stands as the largest investor in seven of Peru’s major mines, controlling 100 percent of their iron ore production and 25 percent of their copper output, including two of the largest mines. This economic investment has facilitated the transfer of USD 634-million worth of military equipment between 2009 and 2019, paving the way for the adoption of PRC-style “digital authoritarianism” and surveillance tactics through Huawei networks. These developments are taking place within our contiguous land mass and steadily encroaching closer to our borders, raising significant economic and security concerns.

China’s economic ambitions have encountered significant challenges alongside their military exchanges. In a recent article published in the Wall Street Journal, Ryan Dube and Gabriele Steinhauser shed light on the crumbling state of many of China’s infrastructure investments in Latin America. Host countries in the region have not received the expected benefits, mirroring patterns observed in Africa and Asia. For instance, Ecuador’s largest hydroelectric plant, constructed with an investment of USD 2.7 billion and financed at a 6.9-percent interest rate, stands perilously close to sliding down a mountainside due to erosion, despite being built by hundreds of Chinese workers flown into Ecuador between 2010 and 2016.

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8 McCaul, “China Regional Snapshot.”
9 McCaul, “China Regional Snapshot.”
11 Dube and Steinhauser, “China’s global mega-projects are falling apart.”
China’s growing military and economic influence in our hemisphere is forcing us to confront strategic competition on our own turf. This shift has the potential to diminish our capacity to effectively compete in INDOPACOM, an arena where we hold significant interests and treaty alliances. However, there is still an opportunity to change the tide by strengthening our relationships both to the North and South. Coalescing our alliances and partnerships can serve as a vital enabler in countering malign Chinese influence and effectively securing our own interests, as well as those of our alliance partners, in the INDOPACOM region.

To achieve this goal, the United States must recognize that the Chinese way of war has evolved. It must make comprehensive investments in the region across all domains, recognizing the need to compete on multiple fronts. Moreover, the US should capitalize on its asymmetric cultural advantage by fostering and leveraging cultural connections. By investing strategically, bolstering relationships, and embracing cultural ties, the US can navigate the challenges posed by China’s economic influence, seize opportunities for mutual benefit, and successfully safeguard our interests and those of our alliance partners in the INDOPACOM theater.

Pitching a Winning Strategy: Countering China’s Malign Influence in Our Backyard

To effectively counter China in the SOUTHCOM AOR, the United States must confront the stark reality that the Chinese way of war differs significantly from what we have encountered in the past. China has adopted a comprehensive whole-of-government approach, actively waging this war and extending its reach through Central and South America. A decade ago, Professor Stefan Halper at Cambridge University prepared an unclassified report for Mr. Andy Marshall at the Pentagon’s Office of Net Assessment, providing an extensive analysis spanning 559 pages. This report detailed China’s not only whole-of-government but also whole-of-society approach to advancing CCP objectives.

One such strategy, known as “The Three Warfares,” was sanctioned by the CCP in 2003. It encompasses psychological warfare, media warfare, and legal warfare, also referred to as lawfare. According to Halper, these three warfares are actively employed against the United States, aiming to diminish our capacity for power projection. One key assumption underlying the analysis is that China utilizes the three warfares to “diminish or rupture regional alliances,” further jeopardizing our interests.

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12 Dube and Steinhauser, “China’s global mega-projects are falling apart.”
A single story on the 2022 Summit of the Americas, featured in the English language version of chinamil.com, explicitly reveals how the three warfares are being employed in Latin America to disrupt partnerships and enhance China’s strategic competition as a home game for the United States. When even prominent figures like actor and World Wrestling Entertainment superstar John Cena are compelled to issue video apologies in both English and Mandarin for referring to Taiwan as a country, fearing repercussions from Chinese-controlled media sources, it becomes evident that the three warfares have entrenched themselves.

In the face of these challenges, the United States must adopt a robust defensive strategy to counter China’s whole-of-government warfare. This strategy necessitates a comprehensive approach, bolstering partnerships, enhancing information warfare capabilities, and safeguarding regional alliances. By fortifying our defenses and exposing the tactics employed by China, the United States can effectively resist and neutralize the impact of the three warfares. Through resilience and proactive measures, we can protect our interests and maintain stability in the SOUTHCOM AOR.

A recent article in The Economist highlights a significant shift in China’s approach to Latin America. China’s policy banks have ceased making new loans in the region since 2020, with even Venezuela receiving credit solely for maintaining oil shipments to China. Furthermore, a study conducted by the College of William and Mary reveals that the region experienced a higher number of cancelled or suspended Belt and Road transactions compared to any other area, reaching its investment peak in 2014. However, amid these developments, mineral extraction remains a constant, with Latin American exports to China, primarily consisting of minerals and other natural resources, surging 28 times higher between 2017 and 2021 than in previous years.

Against this backdrop, a remarkable opportunity arises for the United States to adopt a comprehensive whole-of-government approach, fostering a brighter future with our closest neighbors while strengthening our position in strategic competition. Data indicate that China’s efforts in the region do not effectively benefit the overall nation, as they fail to generate local jobs and often result in crumbling infrastructure. This counternarrative, reminiscent of colonialism, pres-

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16 “What does China’s reopening mean for Latin America?,” The Economist.
ents a stark reality that can easily resonate. By coupling it with incentives for US businesses to make capital investments that benefit all parties involved, we can finally unleash the full potential of our own region in a sustainable and mutually beneficial manner.

Through strategic partnerships, shared prosperity, and long-term investments, the United States can cultivate a thriving regional ecosystem. By harnessing the power of collaboration and aligning our interests, we can build a foundation for sustainable growth and development, leaving behind the pitfalls of China’s diminishing influence. This approach not only strengthens our hand in strategic competition but also establishes a win-win scenario, fostering a resilient and prosperous future for ourselves and our neighbors.

**Conclusion**

The US military possesses a commendable model for cultivating relationships with international partners through professional military education, but it is evident that maintaining quality has become a challenge in keeping up with quantity. The US model, encompassing English language instruction, full integration, and academic freedom to explore diverse topics, has proven to be an effective system for building enduring, values-based relationships. Complementing this, the Air Force’s Language Enabled Airman Program (LEAP) develops Airmen equipped with language proficiency, cultural understanding, and regional expertise, enabling them to directly collaborate with their Latin American counterparts on shared security interests. The result is an increased operational capability and a perception of equality, as Latin Americans witness their own sons and daughters working as capable partners alongside the world’s leading military—an invaluable achievement that cannot be easily replicated.

However, China holds an advantage purely in terms of the sheer number of opportunities, even if the quality does not match the US experience. To address this imbalance, the United States must seek avenues to fund additional opportunities for international officers to attend professional military education alongside their American counterparts. As previously cited articles have highlighted, the tactics and values Latin American officers bring back from their educational experiences in China have a profound impact. The same applies to their experiences in the United States. Increasing capacity at service schools presents a relatively
low-cost proposition that sends a powerful message about our commitment to the region—one that revolves around our most valuable resource of all: people.\footnote{Julio Armando Guzmán, “China’s Latin American Power Play: To Counter Beijing, the West Must Invest in People,” \textit{Foreign Affairs}, 16 January 2023, \url{https://www.foreignaffairs.com/}.}

By investing in expanding opportunities and fostering deeper engagement, the United States can reaffirm its dedication to the region and bolster its partnership-building efforts. Strengthening the human dimension of our relationships demonstrates a genuine commitment to mutual growth and collaboration. Through these actions, the United States can reinforce its role as a trusted and capable partner, contributing to the sustained security and prosperity of the region.

The final recommendation to prevent strategic competition from becoming a home game is to leverage the significant asymmetric advantage the United States possesses in terms of culture. Numerous cultural domains provide opportunities to foster closer connections and shared identity with our Latin American partners. From the presence of large Latin American and Caribbean diasporas in the United States to the influence of pop culture and the shared commitment to democratic principles among most countries in the region, avenues abound for bridging the gap through cultural and linguistic exchanges. A foundational step involves increasing investment in educational exchanges at universities and high school levels, utilizing culture and language as tools to diminish the distance between us. Additionally, bolstering the tourist economy, both inbound and outbound, between Latin America and the United States represents another vital stride toward fostering mutually beneficial interactions. With the majority of the COVID pandemic in the rearview mirror and a strong desire for experiential travel among consumers, culturally and economically advantageous opportunities await. It is important to recognize that approaches such as these represent the long game, requiring time to witness tangible benefits. Nevertheless, enduring impact and lasting outcomes often demand significant investments over time.

China’s endeavors in Latin America compel us to prioritize something that we should have been doing all along—taking our own region seriously. This year marks the bicentennial of the Monroe Doctrine, which effectively declared a “no trespassing” sign on the region. However, history is unlikely to attest that the United States dedicated the level of effort required for the shared security and prosperity of our neighbors. While China has capitalized on an opportunity, the game is far from over, and data indicate that the timing is perfect for a comeback—if we are willing to commit for the long haul instead of merely stepping back once Chinese influence recedes. Through military and economic cooperation, while leveraging common cultural elements, we can forge a stronger and more prosperous region for
ourselves and our neighbors—without compromise. Settling for anything less weakens us at home and hampers our aspirations for security and prosperity both East and West.

The key to winning the away game in strategic competition lies in ensuring it never becomes a home game. By proactively embracing our role and strengthening relationships within the region, we can fortify ourselves against external influences and create a resilient environment conducive to shared security and prosperity. This requires an unwavering commitment to nurturing strategic partnerships and working collaboratively toward a brighter future for all.

Walter H. “Howard” Ward, Jr.

Mr. Ward is a distinguished leader in the field of military education and cultural understanding. Currently serving as the director of the Air Force Culture and Language Center (AFCLC) at Air University, located at Maxwell Air Force Base in Alabama, Mr. Ward spearheads a dedicated team of 65 military personnel and Air Force civilians. Together, they are committed to the deliberate development of Airmen and Guardians, fostering partner interoperability and promoting a deep understanding of adversaries through language proficiency, regional expertise, and cultural education.

With a wealth of experience and a distinguished career, Mr. Ward retired as a colonel and brings his invaluable leadership skills to his current role. Notably, he served as the Commander of the 317th Airlift Group, stationed at Dyess Air Force Base in Texas. This operational assignment showcased his capabilities as he commanded six squadrons, overseeing the efforts of 1,200 aviators, maintenance professionals, and support personnel. Under his guidance, the group effectively operated 28 C-130J aircraft, engaging in combat aerial delivery operations across the globe.
China’s rapid digital expansion in Latin America and the Caribbean (LAC), coupled with plans to extend its Digital Silk Road (DSR) globally, marks a pivotal moment. Brazil’s unexpected move to include Huawei, a Chinese telecom giant, in its upcoming 5G auction defies US expectations and will undoubtedly reverberate throughout LAC. Despite prior US caution and strong bilateral ties, Brazil’s change aligns with China’s vaccine diplomacy, raising eyebrows. China’s adept use of economic leverage, vaccine diplomacy, and concessional loans likely influenced Brazil’s Communication Minister, Fábio Faria, granting Huawei a shot at building the national telecom network. The pressing concern lies in China’s National Intelligence Law (Article 7 and 14), compelling organizations to partake in intelligence activities. This situation mirrors LAC’s potential future. Central questions emerge: Can Brazil and LAC incorporate China’s DSR securely? How can the US mitigate the escalating digital influence wielded by China?

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In its narrowest interpretation, the Digital Silk Road (DSR) of China represents the digital facet of the Belt and Road Initiative (BRI), a globally acclaimed blueprint for infrastructure and investment. The DSR encompasses the entire spectrum of worldwide interconnectivity, encompassing both physical and digital mechanisms for facilitating linkage. This encompasses traditional equipment, or the hard infrastructure, such as fiber optic cables, servers, fifth generation (commonly referred to as 5G) towers, networks, and satellites. Projections from the World Economic Forum indicate an anticipated USD 15 trillion global infrastructure disparity by 2040, of which USD 2 trillion pertains to the digital divide. Thus, China finds itself well-positioned to significantly narrow this gap, addressing both the tangible and digital dimensions. The catalyst for the DSR was initially revealed in 2015 during the formal announcement of the BRI. Swiftly taking precedence, the DSR emerged as the central constituent, as underscored by President Xi himself in 2017. The apex was

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reached in 2018 with China’s Vice Minister of Information Technology articulating the nation’s intent to forge “a community of common destiny in cyberspace.”\(^2\) By 2020, China secured backing from 16 countries through signed memoranda of understanding for the DSR, although differing accounts propose a notably larger count. The Council on Foreign Relations (CFR) approximates approximately 40 countries—equivalent to one-third of BRI participants—collaborating in the DSR.\(^3\)

**China’s Ambitions**

Analyzing communiques, development plans, and strategic messaging reveals insights into China’s national interests, encompassing economic aspirations, resource security, advancement of Chinese technology, and fortification or enhancement of bilateral relationships. Consequently, two distinct perspectives on China’s ambitions emerge: one propelled by domestic and economic considerations, and the other centered on securing their prominence as a global technological frontrunner. Substantiation exists for both viewpoints. Hong Shen, a trailblazer in dissecting China’s DSR, categorizes its dimensions into five key facets: alleviating industrial overcapacity, facilitating global expansion of corporate China, bolstering the internationalization of the renminbi (RMB), constructing a transnational network infrastructure centered around China, and championing an Internet-driven “inclusive globalization.”\(^4\)

Shen’s initial three dimensions are intricately intertwined with the objectives of the BRI, reinforcing the first viewpoint. Reflective of the “going-out” strategy, Chinese enterprises’ overseas expansion (second dimension), funded with state backing, serves to alleviate the domestic overcapacity of technology firms (first dimension). The pursuit of RMB internationalization (third dimension) remains a consistent endeavor for China, aiming to validate its currency and challenge the dominance of the US dollar. This underpins the second perspective, aimed at securing China’s position as a global technology leader.

Clayton Cheney, a former fellow with the Pacific Forum, outlines four overarching categories within the DSR, encompassing interconnected technology-focused endeavors: digital domain physical infrastructure, advancement of cutting-edge technologies, digital commerce, and international norms within cyberspace and

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advanced technologies. Beyond the notable parallels when cross-referencing both frameworks, the most noteworthy convergence lies in Shen’s fourth dimension—construction of a China-centric global network—and Cheney’s fourth initiative—international norms within cyberspace and advanced technologies. This intersection underscores China’s pursuit of technological supremacy. President Xi lent support to this assertion in 2014, articulating his vision to transform China into a cyber powerhouse.

**DSR’s Strategic Implications**

The expansive nature of the DSR, often intertwined with BRI funding, introduces distinct challenges when attempting to quantify China’s total investment within the initiative. The intricate interplay of the DSR, along with the opacity of the People’s Republic of China (PRC), further compounds this difficulty. Disparate findings from think tanks and institutions compound this challenge.

![China's DSR spending by country](https://shared.deloitte.se/)

Data: RWR Advisory Group. Includes projects completed or initiated outside China since 2012 that enhance the digital infrastructure of the target country. Does not include mergers or acquisitions. Dollar values for some projects are unavailable and therefore aren’t reflected in country totals.

**Figure 1. China’s DSR spending by country.** (Source: BRI Update 2019—Recalibration and New Opportunities (Beijing: Deloitte. 2019), https://shared.deloitte.se/.)

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Beyond the quandary of precisely gauging China’s foreign direct investment within the initiative, what remains conspicuous is the vast scale and ambit of the DSR. If the figures are accurate, the DSR initiative channels substantial investments into countries grappling to bridge the digital divide. For instance, India, China’s neighboring nation, alone has received nearly USD 6 billion in DSR funding, while Mexico in the Western Hemisphere has secured over USD 4 billion. Additional endeavors, such as smart city projects and network equipment agreements, offer societal benefits such as crime reduction, improved traffic flow, and enhanced emergency response. In a Brazil case study, Nokia and Omdia estimated that fortifying the national telecommunications network could yield an economic productivity boost of USD 3 trillion, positively impacting government, agriculture, industry, and manufacturing sectors.⁶

Multiple risks loom for participants associating with the DSR, most notably China’s National Intelligence Law, Article 7 and 14, which legislatively obligates all organizations and citizens to provide support, assistance, and cooperation in intelligence activities. In essence, irrespective of the PRC espoused degree of separation between state-owned enterprises (SOE) or individuals, their assistance and cooperation are mandated by law. Although some contend that similar national intelligence laws exist in other liberal democracies, the distinction lies in the latter’s accountability to civilian institutions and oversight. China, conversely, wields unilateral authority over its intelligence and military sectors. Amnesty International’s attention has also been drawn to this, asserting that the law stands “incompatible with China’s international human rights obligations.” The organization calls for its retraction and revision with public involvement.⁷

**Are the Risks Real?**

Substantial evidence substantiates the aforementioned risks, spanning allegations of governmental interference in Poland;⁸ unauthorized rerouting of African Union information to Chinese servers;⁹ aiding Ugandan and Zambian officials

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in surveillance of political opponents, and state-sponsored intellectual property theft (IP) in the United States. These instances exemplify the risks within China’s DSR domain. In a separate US Department of Justice report, more than two-thirds of the theft of trade secrets cases had a nexus to China. However, the report fell short of directly attributing responsibility to the Chinese government. Maza contends that China’s illicit acquisition of US technology costs companies over USD 300 billion annually and nearly 2 million jobs. He proposes that China leverages economic disparities to secure technological dominance, using sanctioned intelligence collection of classified information, establishment of front companies and joint ventures to bypass tech transfer laws, and acquisition of enterprises and technology.

In opposition to the aforementioned covert operations, a counterargument suggests that countries including the US, United Kingdom, Japan, and South Korea have similarly exploited IP theft for economic advancement, ultimately driving them toward regional and superpower status. Another perspective posits that concerns over IP theft predominantly afflict developed nations like the US, and that developing countries can potentially gain from China’s DSR. This encapsulates the fervent debate surrounding cybersecurity risks, potentially mirroring the broader geopolitical rivalry between the US and China. Caught in this milieu are not solely allies on both sides but notably, nations in the Global South striving to narrow the digital gap. Thus, the answer to whether the advantages outweigh the risks is intricate and context dependent. For low to middle-income countries, China’s DSR could significantly aid in bridging the digital divide. Conversely, from the standpoint of Western liberal democracies, the response leans toward negativity, as a globally pervasive network with Chinese characteristics could challenge the bedrock principles of democracy.

Cost Benefit Analysis

Quantifying the advantages and drawbacks of engaging with China's DSR initiative proves intricate. The evaluation hinges on individual countries, determining the weight of each variable, given their distinct variations across nations. For instance, a nation in the Global South aspiring to bridge the digital divide will assign greater significance to acquiring loans and funding for technological advancement. Conversely, those devoid of indigenous innovation might diminish the perceived significance of the IP theft risk.

DSR in the Latin America and the Caribbean Context

Taking a comprehensive perspective and grasping China's intentions behind the DSR, this section delves into its implications within the LAC context. While it might seem rhetorical to challenge China's altruistic motives, it remains judicious for leaders not to be swayed by the oft-promoted win-win cooperation narrative advanced by the PRC. China's remarkable growth necessitates an extensive array of resources, raw materials, and energy. Ensuring unimpeded access to these resources and a seamless flow is imperative to sustain China's growth and its ascent as a global tech leader. This pursuit has propelled China toward the LAC region.

Margaret Myers succinctly characterizes China's economic trade strategy in Latin America as singularly focused on commodities. From 2000 to 2013, China transformed from a negligible player in terms of export destination and import origin to becoming the first, second, and third source of imports for 17 LAC countries. Despite the substantial surge of Chinese influence in LAC, the interaction and rapport remain asymmetrical; 84 percent of LAC exports to China comprise commodities, while 63.4 percent of Chinese exports consist of manufactured goods.\textsuperscript{14} Instances such as oil from Venezuela, copper from Chile, soy and cattle from Brazil, and lithium from Argentina, Bolivia, and Peru spotlight the imbalanced commodity exports to China. This skewed transaction contradicts China's touted win-win narrative.

President Xi introduced the “1+3+6 cooperation framework” during his 2014 visit to Fortaleza, Brazil for the BRICS Summit. This blueprint delineates China's economic strategy for the region: the “1” symbolizes the China–CELAC Cooperation Plan (2015–2019), the “3” encompasses the economic engines of trade, investment, and financial cooperation, and the “6” signifies the six focal industries—energy and resources, infrastructure construction, agriculture, manufactur-

\textsuperscript{14} Maristella Svampa, \textit{Neo-Extractivism in Latin America: Socio-environmental Conflicts, the Territorial Turn, and New Political Narratives} (New York: Cambridge University Press, 2019).
ing, scientific and technological innovation, and information technologies. This framework not only corroborates the theories elucidated by Shen and Cheney in the preceding section but also underscores Myers’ assertion regarding China’s emphasis on commodities.

**China’s Digital Influence in LAC**

While considerations of environmental repercussions stemming from extraction practices and the asymmetrical economic dynamics warrant comprehensive exploration, as they intersect numerous policy decisions, this paper maintains a specific focus on China’s DSR. Evidence underscores a substantial degree of digital influence across the LAC spectrum, ranging from marginal to substantial within certain nations. Officially, four LAC countries stand as signatories to China’s DSR. Nevertheless, as elucidated by CFR and Deloitte through their data, multiple countries, including Mexico, which has garnered over USD 4 billion in DSR funding and projects, may have also benefited from similar informal funding channels. A visible indicator could involve scrutinizing nations that have embraced the BRI, often viewed as a precursor to the DSR; and in this regard, 18 LAC countries stand as BRI signatories.

**Case Study: Brazil’s 5G**

Examining Brazil’s decision to allow Huawei, a Chinese telecommunications corporation, to partake in upgrading their network with advanced fifth generation (5G) capabilities unveils the extent of China’s influence within LAC. In August 2021, Brazil’s President Jair Bolsonaro granted Huawei the opportunity to construct the country’s telecommunication infrastructure. This pivotal choice marked a complete reversal, a 180-degree shift, from the administration’s previous anti-China stance, catching even the US off guard. Despite the close alignment with the US and clear warnings, Brazil’s decision curiously coincided with China’s donation of millions of COVID-19 vaccines during the peak of Brazil’s second wave.

China, renowned for its adept use of economic diplomacy to secure trade deals and concessions, has now integrated vaccine diplomacy or the Health Silk Road (HSR) to achieve analogous outcomes. In this instance, the DSR converges with the HSR, both serving as conduits for China to expand its influence across the LAC domain. It is plausible that Brazil’s receipt of COVID vaccines from China was contingent upon their acceptance of Huawei’s involvement. While China refutes such claims, Brazil’s Minister of Communication, Fábio Faria, divulged an

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15 BRI Update 2019.
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unusual entreaty from a telecommunication firm after his meeting with Huawei’s top executives: “I took advantage of the trip to ask for vaccines, which is what everyone is clamoring for.” Irrespective of the veracity of these allegations and statements, Huawei’s Brazil President, Sun Baocheng, acknowledged the significance of this decision as a “benchmark” for other nations globally that face comparable pressure from the United States.16

Regional Implications

Regardless of the bidding outcome, Brazil’s readiness and determination to embrace Huawei sends a clear message to neighboring and regional powers that the option of considering such a move is not only feasible for acquiring vaccines but also for enhancing telecommunication infrastructure. In essence, the two variables—the closure of the digital divide and the intersection of the DSR with the HSR in this case—hold the higher coefficient. Brazil prioritized expanding their 5G network and obtaining vaccines. In essence, China’s expanding digital influence has firmly established itself in Brazil, a nation traditionally regarded as a close US ally. This watershed decision is poised to resonate across the LAC region. While Brazil’s authoritative role in setting the agenda signifies to regional powers that embracing Huawei is plausible and offers tangible advantages, what remains unexpressed is Brazil’s distinct position, characterized by a robust gross domestic product (GDP) and a cybersecurity legal framework, affording them strategic adaptability in negotiations and bargaining prowess.

Brazil / LAC Policy Recommendations

As previously discussed, Brazil possesses distinct advantages in negotiations with China due to its status as a regional power, high GDP, and robust cyber legal framework. However, the game theory model’s outcome yields comparable policy recommendations. It can be misleading that mutual cooperation would yield optimal results, as clarified in the subsequent paragraph and indicated by the higher numerical values. Brazil would harness the benefits of incorporating Huawei’s 5G technology into its telecommunication network at a reasonable cost and of satisfactory quality. Simultaneously, China would derive economic and diplomatic gains if Huawei secures the bid, concurrently bolstering bilateral relations with Brazil. A supplementary consequence, as recognized by Huawei’s representative in Brazil, would be the augmentation of their reputation and stature within the LAC region.

However, the feasibility of this mutual cooperation is hampered by China’s National Intelligence Law, as outlined in the initial section of this paper. To reiterate, all entities, including Huawei, are bound by Article 7 and 14. Consequently, under all scenarios, the prospect of China defecting or acting upon the allegations detailed in the aforementioned section remains their most favorable course of action. This outcome would solely change if China were to revise its National Intelligence Law, an unlikely scenario. Consequently, the next best course of action for Brazil and other LAC countries is to collaborate with China while being cognizant of the highlighted risks.

Sequential Game Theory for LAC-China

The prisoner’s dilemma model proves inadequate in extrapolating actionable policy recommendations. To attain a comprehensive understanding of the probable outcomes that steer Brazil’s two policy recommendations—conditional acceptance and bargaining options—we need to explore the cooperation/defection dichotomy. Both strategies encompass various variables, including bridging the digital divide, convergence with BRI loans and vaccines via the HSR, while simultaneously considering the preservation of relations with the United States. Anticipating China’s probable actions, implying their adherence to the National Intelligence Law, subsequent to the initial cooperative move, three courses of action emerge: rejection, bargaining, or conditional acceptance. This precise sequence unfolded in the Brazil case study, as evidenced by the Ministry of Communication’s endorsement of Huawei during August’s 5G auction. Rejecting Huawei is exceedingly improbable, as indicated by a Brazilian legislator who contended that excluding Huawei was never a viable option due to its extensive integration within numerous enterprises. Removing Huawei would incur substantial costs in replacing components, ultimately borne by consumers.\(^{17}\)

Courses of Action: Conditional Acceptance and Bargaining

The optimal policy recommendation entails conditional acceptance, wherein Brazil/LAC embraces Huawei while acknowledging potential risks like system vulnerability, surveillance, espionage, government, and political intervention. However, a strategic approach involves segmenting or “hiving off” the scope of Huawei’s involvement, confining DSR projects to specific cities or states. This approach minimizes the threat to the national telecommunication network. “Hiving” refers to partitioning a designated section of the telecommunication infrastructure to

\(^{17}\)“Brazil Political Press Review 14 September 2021,” BBC Monitoring.
curtail the jeopardy to the entire system. This stance navigates a middle path, neither fully embracing nor entirely rejecting China or the US. Though this might spark contention from the US standpoint, until a viable alternative emerges to challenge companies like Huawei, the US lacks the political leverage to reverse such an outcome. Additionally, as evidenced by the International Institute for Strategic Studies case study, accepting Huawei or analogous DSR projects resulted in marginal changes in US alliance and posture.\(^\text{18}\)

An alternative policy avenue involves harnessing bargaining theory, wherein Brazil/LAC leverages their agenda-setting influence to foster China’s cooperation. Publicly framing any infringement upon their sovereignty as detrimental to China’s reputation and potentially causing opportunity loss within the LAC region serves as a leverage strategy. Conversely, Brazil can adopt a positive perspective, emphasizing that Huawei’s success or other projects could amplify China’s positive influence across LAC. Capitalizing on the uniqueness factor inherent in bargaining theory offers another avenue to rectify information and economic imbalances. LAC’s distinctiveness as a commodities source and their role in the global trade network bestow them with leverage, enabling restrictions on resource exports. However, the risks attached to such an approach encompass reciprocal damage to their economy and markets, coupled with China’s potential retaliatory measures.

**Risks, Limitations, and Implications**

The conditional acceptance strategy’s limitations lie in the potential emergence of a digital divergence—a precursor to a bifurcated internet system. While it might bring benefits to the recipient nation, it could trigger a digital schism, initiating the establishment of two separate internet realms. Such an outcome would likely intensify geopolitical competition, not solely between the US and China, but also compel allies and adversaries to make divisive choices. Striving to find a middle ground to appease both superpowers might result in fallout with either party, thus potentially affecting other junctures of the DSR, including BRI funding, vaccine diplomacy, and additional revenue channels.

Comparable risks are associated with the bargaining option, as China holds the capability to counteract “name and shame” through media suppression, nondisclosure agreements, disinformation campaigns, and other mechanisms that control the discourse of free speech. Blocking the public framing aspect of bargaining theory would empower China to persist in state-sponsored IP theft, engage in

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\(^{18}\) Nouwens et al., *China's Digital Silk Road*. 
other forms of cyber espionage, and amplify the asymmetry between countries for the purpose of exploitation or concessions.

**US Policy Recommendations**

The US position within the game theory model starkly contrasts with that of the LAC region. Any form of cooperation or acquiescence on the part of the US toward China would yield an unfavorable outcome. The optimal course of action for the US lies in defection, should China’s established modus operandi persist, which primarily involves upholding their National Intelligence Law and eschewing adherence to the rule-based international system. While this research paper primarily delves into the compartmentalization of the DSR, it’s essential to acknowledge that the intersection of political tensions—such as human rights transgressions and climate change policies—holds a coefficient, albeit a lower one, in shaping the US policy recommendation. Conversely, the inverse approach would signal to both allies and adversaries that the US is willing to tolerate violations of the aforementioned standards and a lack of adherence.

Echoing the optimal strategy for the US, China’s most strategic reaction in this scenario is to defect as well. This establishes a Nash equilibrium of defect/defect. Recognizing the US stance, China is unlikely to voluntarily conform to international norms, as doing so could impede their technological innovation. Additionally, halting alleged operations of cyber espionage, IP theft, asymmetrical exploitation, and concessionary loans is improbable, given China’s current economic and diplomatic gains. Measures imposed by the US, including placing certain Chinese companies on the Department of Commerce’s Entity List and fortifying existing multilateral institutions to further restrict China’s access to specific technologies, will hinder their technological advancement. According to the IISS, China presently lags behind the US by a decade in the tech race; adopting the US defect strategy will ensure that China does not close the gap in this digital race.¹⁹

**US Policy Implementation in LAC**

With the application of game theory, it becomes evident that the LAC region will strive for cooperation with both China and the US. To safeguard its national interests and those of LAC, the US must not solely present favorable economic alternatives but also enlist the backing of multilateral organizations like the International Monetary Fund (IMF) to tackle urgent challenges, notably the digital divide and infrastructural advancement. Thus, the recommendation is to capitalize

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¹⁹ Nouwens et al., *China’s Digital Silk Road.*
on existing institutions, such as the US International Development Finance Corporation (DFC), and to persist in advocating initiatives such as the Blue Dot Network and the Health and Prosperity framework.

The Better Utilization of Investment Leading to Development (BUILD) Act, signed into law on October 5, 2018, empowers entities like the DFC, federal programs, and the US Export-Import Bank to channel private equity into funds for infrastructural development. Collaborating with the Overseas Private Investment Corporation (OPIC) and USAID’s Development Credit Authority, the DFC invests across sectors including energy, healthcare, critical infrastructure, and technology. The allure of harnessing untapped market potential into a stable, secure, and lucrative fund focused on foreign physical and digital infrastructural investment stands as a feasible approach to bridging the USD 15 trillion global infrastructural gap. Moreover, it offers debt financing, equity investments, feasibility studies, investment funds, political risk insurance, and technical assistance to emerging markets and developing nations. By September 2021, the DFC had successfully executed over 200 projects in more than 20 countries and territories within the LAC region, culminating in a total investment exceeding USD 10 billion.

An Alternative to China’s DSR

The US DFC stands as a distinct alternative to China’s BRI and DSR, supporting “an economically viable form of private sector-led investment, offering a robust alternative to state-directed investment which often leaves countries saddled with debt.” The Blue Dot Network, an initiative centered on endorsing quality infrastructure investments by certifying projects driven by market dynamics, social and environmental responsibility, financial sustainability, transparency, accountability, and inclusiveness, exemplifies this alternative approach. This initiative is poised to challenge China’s DSR, with its emphasis on the color blue serving as a deliberate juxtaposition to China’s prominent red featured in its national flag. Nevertheless, potential for cooperation may surface in domains like critical infrastructure, specifically in addressing the digital divide.

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Possible Cooperation?

A contrarian perspective and a minor departure from the game theory model propose that the US and other Western democracies encourage China to participate in initiatives like the Blue Dot Network, rather than pursuing the current decoupling strategy. Such a move could be interpreted as an extension of the proverbial olive branch in diplomacy, while also ensuring China’s compliance with the principles and standards endorsed by the US and its allies. It is likely that China would reject this proposal due to the potential constriction of their technological progress, even if it were through alleged illicit means. Nevertheless, if conditions were established in which China’s digital influence and economic growth would not be impeded, but rather might flourish in a free market characterized by principles of equitable and transparent competition, then the prospect of cooperation could arise.

Like the Biden administration’s stance of non-containment and cooperation when feasible, involving China in the formulation of future standards and norms for digital governance compels them to live up to their self-proclaimed role as a responsible stakeholder. This approach would reduce the probability of a divided internet system and ease the pressure on allies and developing nations to make a binary choice between the two factions. History has demonstrated that the PRC has adhered to international standards such as the G20 principles, WTO regulations, the Paris Agreement, and more recently, the jointly released communiqué by the US and China at the COP26 climate convention. Leveraging these successes to establish a framework for international digital governance is a logical progression.

Conclusion

From the perspective of recipient countries, the acceptance of China’s DSR projects and funding undoubtedly yields substantial economic growth, employment opportunities, enhanced trade prospects, and improved digital capabilities. While, for select nations in the LAC region, the advantages of China’s DSR may seem to outweigh the associated risks, it remains crucial to thoroughly evaluate these risks, despite their comparatively lower coefficient. In a world increasingly reliant on technology and connectivity, China is strategically positioned to narrow the global digital divide. The trajectories projected by game theory models suggest China’s likely path, indicating the potential proliferation of cybersecurity risks such as state-sponsored IP theft, violations of digital sovereignty, and resource extraction.

The current accomplishments of the DSR are multi-faceted; not only do they legitimize the Chinese Communist Party, thereby ensuring regime stability through
domestic political reassurance, but they also influence the future landscape of digital governance. However, the ongoing success of China’s initiatives is not pre-determined, considering that the US possesses substantial capability and capacity to not only contest China’s DSR, but also to provide an alternative for the LAC region. This alternative can be economically feasible, sustainable, and aligned with Western liberal principles. The US International DFC serves as an exemplar of a federal agency that has and will continue to contribute to the financial development of the LAC region while safeguarding US national interests.

MAJ Neil Law, US Army
Major Law is a Foreign Area Officer with more than 13 years of active-duty service. He completed two combat deployments to Afghanistan, one embassy assignment, and key developmental assignments spanning two continents, and most recently, attained his master’s degree from Columbia University.

A native of New York, he began his military career in 2010 as a Second Lieutenant in the US Army, receiving his commission from the Reserved Officer Training Corps (ROTC) from State University in New York (SUNY) at Albany. Transitioning to the Foreign Area Officer Corps in 2018, he is regionally focused on Latin America, providing unequalled time-sensitive situational awareness to senior decision makers.

His military schooling includes the Western Hemisphere Institute of Security Cooperation (WHINSEC), Defense Language Institute–Foreign Language Center (DLIFLC), Air Assault School, Combined Logistics Captain Career Course (CLC3), and Transportation Basic Officer Leader Course (T-BOLC).
The Hen or the Hog?

Chile in the Indo-Pacific

PABLO MACCHIAVELLO POBLETE

Abstract

This article investigates Chile’s claim as the primary South American gateway to the Indo-Pacific and its stakeholder status in the Pacific Rim and Indo-Pacific construct. Despite Latin American efforts, no Indo-Pacific actor acknowledges the American countries as part of the region. The article argues that although Chile’s coastal position on the Pacific Ocean is indisputable, Santiago still needs to determine the extent of its commitment to the geopolitical construct and act accordingly to gain recognition as an engaged actor in the Indo-Pacific. The article provides an overview of Chile’s foreign policy in the Indo-Pacific, highlighting its active participation in multilateral organizations such as the Asia-Pacific Economic Cooperation and the Pacific Alliance. Additionally, the work examines Chile’s bilateral relations with Indo-Pacific countries and discusses the country’s economic and strategic interests in the region. Ultimately, the article concludes that Chile must actively engage in the Indo-Pacific to safeguard its long-term economic and strategic interests, and Santiago must take concrete steps to strengthen Chile’s position as an Indo-Pacific actor.

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Writing about the Indo-Pacific from a Global South perspective presents a significant challenge, particularly for Chilean scholars who seek to understand their country’s role as a stakeholder in the region. To shed light on this challenge, an analogy related to breakfast can be helpful, albeit with potential loss of meaning in translation.

Breakfast, known as the most important meal of the day since a breakthrough discovery in the 1920s, features food combinations that are inseparable in our imagination, such as peanut butter and jelly, biscuits and gravy, or pancakes and syrup. Among American families, the preferred morning combination often consists of eggs and bacon, which research has shown to provide notable health benefits, including enhanced focus and performance for school children. The preparation of this dish requires interaction with both the hen and the hog.

In this context, the hen represents involvement, where it contributes eggs by dedicating time, effort, and some resources to the breakfast preparation. However, the hog symbolizes commitment, as it sacrifices itself to provide the meat for the meal. In the context of great-power competition, all countries actively seek to participate in the benefits offered (referred to as breakfast) by the dynamics of the Indo-Pacific by applying this analogy. When evaluating Chile’s position in the
Indo-Pacific, it becomes crucial to determine whether Chile is merely involved, like the hen, or genuinely committed, embodying the role of the hog.

By exploring this metaphorical framework, we can better understand the need to discern Chile’s level of involvement or commitment in the Indo-Pacific. It prompts us to question whether Chile’s role in the region aligns with the hen's limited contribution or the hog’s full sacrifice. Chile must assess the answer to this question on its own by looking beyond narrative, evaluating its actions in the international scenario, and envisioning possibilities for the future.

**Historical Perspectives on Ocean Spaces and Power Dynamics**

The Indo-Pacific region has witnessed significant transformations since the beginning of the twenty-first century. It is no longer solely defined by its geographic position regarding the Pacific Ocean, but rather by its ability to exert influence across the vast area spanning between Bab el-Mandeb and the Panama Canal. This shift in focus presents a challenge when attempting to comprehend the current dynamics surrounding the Pacific Ocean from a Global South perspective.

Throughout history, the consolidation and transformation of power among states have played a pivotal role in international political change. As Robert Gilpin noted, “the most important factor for the process of international political change is the differential or uneven growth of power among states.” Ocean spaces have consistently featured in the foreign policies of nations, as evidenced by the historical accounts of conflicts. Thucydides’ analysis of the Peloponnesian War reveals that decisive actions were often conducted at sea, and similar notions were supported by figures like Plutarch and Xenophon, who described the consolidation of Spartan hegemonic power through maritime vision.

Considering this historical backdrop, the question arises: What new insights can be gleaned in the international relations scenario of the twenty-first century? One possible starting point is the pivotal visit of President Nixon to China in 1972, which marked the reintegration of the People’s Republic of China into the international system. This event triggered the continued and sustained growth of China and catalyzed an unexpected leap forward for a group of Asian countries, the Association of Southeast Asian Nations (ASEAN), reshaping the axis of international

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relations from a transatlantic to a transpacific logic. Consequently, a whole new branch of international relations perspective for the twenty-first century emerged.\(^4\) In today’s world, globalization, international trade, and technology, among other factors, have refocused attention on sea lines of communication (SLOC) as the foundation of prosperity, with the Pacific Ocean emerging as the primary contested space. Great powers actively and informally concentrate on the Pacific Ocean, expanding competition into the Indian Ocean, which raises concerns for coastal states about the future trajectory.

The sum of phenomena currently unfolding in maritime spaces lacks a specific designation, despite scholars’ extensive efforts to explain it. The lack of consensus on the subject is evident, with the area of interest being referred to by various names depending on the individual and their background. Whether it is termed the Pacific Rim, Asia-Pacific, Indo-Pacific, Indo-Pacific Asia, Indo-West Pacific, or numerous other designations, the understanding of this evolving phenomenon remains a subject of ongoing debate and exploration. Despite Chile’s long-standing tradition of using the term *Pacific* to describe its engagement, the complexity of the current scenario necessitates moving beyond a mere geographic description of the area of interest.

Geography delineates explicit borders that determine the names, countries, continents, and places, establishing them as homogeneous areas of study. The divisions are often based on physical features that aided civilizations in territorial division, considering climate and social factors.\(^5\) Similarly, the division of oceans incorporates physical land points such as Cape Horn, Malacca, Panama, Sunda, and the Oman Strait, which shaped the Indian and Pacific Ocean regions. To facilitate data gathering and conservation efforts, marine experts have classified maritime spaces into 12 marine ecoregions, defined by homogeneous sea conditions like bathy-thermography profile, salinity, fish endemism, and distribution of marine life.\(^6\)

When examining the Indo-Pacific, marine biologists exclude the American continent as a unit of study or a stakeholder in the region. However, regarding the multidisciplinary and simultaneous phenomena occurring in transpacific maritime spaces, different concepts have emerged based on the particular interests of the

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involved actors. Critical geopolitics, a divergent branch of geopolitics, introduced the notion of spaces and power from a constructivist epistemology in the late 1970s.\(^7\) Fifty years before, the Weimar Republic of Germany strategically employed the integration of the Asian shores of the Pacific Ocean and the Indian Ocean, combining oceanography, ethnography, and philology as a means for Germany to enhance its national power and challenge the geopolitical position of the British Empire in the area.\(^8\) This construct was aimed at fostering political consciousness to resist British, American, and Western European colonies by envisioning India's independence and China's transition to a republic.\(^9\)

In the interwar period, Japan embraced the concept of the Indo-Pacific to pursue its vision of Lebensraum, which ultimately led to their invasions in the Philippines, China, and Southeast Asia. In 1998, France made a strategic move by fostering closer ties with India based on their shared interest in the Indo-Pacific region. France considers itself part of the Indo-Pacific due to its history with overseas territories, the permanent deployment of over 8,000 soldiers, active naval diplomacy, and one of the largest economic exclusive zones in the world, attributed to the French Polynesian Islands.\(^10\)

The term Indo-Pacific was adopted by Australia in 2005 and later by Japan in 2007, undergoing a shift from an economic to a security construct.\(^11\) India was the first country to institutionalize the term in a paper published by the Institute of Defense Studies and Analyses in early 2007, in collaboration with the state-sponsored Japanese think tank, the Japan Institute of International Affairs (JIIA).\(^12\) The United States also joined the discussion when Secretary of State Hillary Clinton made a notable declaration in the media. In an article published in Foreign Policy magazine in 2011, Clinton argued that, just as the United States had invested in


the transatlantic bond in the twentieth century, it was now crucial for America to engage in the transpacific network, emphasizing the interconnectedness of the United States’ future with that of the Asia-Pacific region.\textsuperscript{13}

Australia further emphasized the importance of the Indo-Pacific in its 2013 White Paper, expanding upon the concept in the 2016 version of the publication.\textsuperscript{14} Since then, the term has been widely employed by journalists, academic researchers, politicians, economists, and the military to comprehend and explain various phenomena occurring in these maritime spaces. More than 40 countries have formulated individual Indo-Pacific strategies, each tailored to their own interests. These strategies vary greatly, with some countries characterizing the Indo-Pacific as “stable and prosperous” (Australia), “inclusive” (India), “focused on local presence” (France), or “connected and competitive” (Germany). In contrast, the United States and its allies emphasize the concept of a Free and Open Indo-Pacific (FOIP), while China dismisses any foreign conceptions as mere “wave foam.”\textsuperscript{15}

Since its declaration of independence in 1818, Chile has sought to establish itself as a dominant naval power in the South Pacific. This pursuit has shaped its unique understanding of oceanic spaces, driven in part by the absence of maritime neighbors.\textsuperscript{16} This ideology, deeply ingrained in Chilean society, transcended political parties and was embraced by the nation’s founding fathers, naval officers, politicians, and intellectuals, as evidenced by their consistent reference to the Pacific Ocean.

Throughout the twentieth century, Chile experienced both successes and setbacks in solidifying its tricontinental position. This position encompassed a continuous presence within a triangular area defined by Chile’s northern border in South America, the South Pole in Antarctica, and Easter Island, along with the surrounding maritime areas in accordance with the United Nations Convention on the Law of the Sea (UNCLOS).

However, following an unfavorable ruling by the International Court of Justice in 2014, Chilean politicians recognized the need for a strategic shift. Merely maintaining a presence in the maritime spaces of interest was no longer sufficient. The


\textsuperscript{14} Defence White Paper 2013 (Canberra: Department of Defence, 12 May 2013), https://www.globalsecurity.org/.


key now lay in the ability to project state power deep into the Pacific and Indian Oceans. Thus, at least in the realm of narrative, Chile began contemplating an Indo-Pacific concept as a means to adapt to this new reality.

The Indo-Pacific is not merely a biological, geographic, or spatial concept; it emerges from a critical geopolitical approach and reflects a constructed terminology aligned with specific political ideas. From an ontological standpoint, the very name used to denote this space is already influenced by geopolitical and social agendas. Although one might assume that the Indo-Pacific encompasses the Pacific Ocean, the Indian Ocean, and the countries surrounding this region, different countries interpret and employ the term in varying ways. Each actor utilizes a flexible concept to define the geographical scope and extent of the terminology, leading to discrepancies between countries and even within a single country’s definition over time or when engaging with different actors. Given this construct, where does the Pacific Coast of the Americas fit in?

Chile’s Growing Engagement in the Indo-Pacific Region

Chile, located in South America, has been actively increasing its presence in the Indo-Pacific region in recent years. Like many countries worldwide, Chile recognizes the strategic importance of the Indo-Pacific and has taken steps to engage with the region. Chile’s position in the Indo-Pacific is influenced by various factors, including its geographic location, economic interests, and political relationships with other countries in the region.

Chile’s geographical location provides it with a significant advantage in terms of trade and commerce, offering convenient access to the Asia-Pacific region. The country has actively participated in regional economic integration efforts, such as the Trans-Pacific Partnership (TPP), which has evolved into the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) ratified by the Chilean Congress in 2022. This agreement involves countries like Japan, Australia, and New Zealand, granting Chile access to a vast market in the Asia-Pacific region. Additionally, Chile has signed free trade agreements with several countries in the region, including China, South Korea, and Japan, further strengthening its economic ties with the Indo-Pacific.

Chile has taken discreet steps to lead South America in opening trade routes with the Asia-Pacific region, with the Pacific Alliance being a significant initiative.

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that unites Mexico, Colombia, Peru, and Chile in engaging with the area.\textsuperscript{19} The Alliance, whose primary objective is to present a united front for engaging with major economies of the Pacific Rim, has experienced slow progress due to internal instability within Latin American countries in recent years. This includes events such as the popular demonstrations in Chile in 2019 and the democratic crisis in Peru in 2022.

Since 1980, Chile has consistently made political and diplomatic efforts to be involved in the Pacific Rim. The country has engaged in continuous dialogues with Pacific nations, leading to the establishment of the Chilean Foundation of the Pacific and gradual participation in regional diplomatic and economic mechanisms, such as the Pacific Basin Economic Council and the Asia-Pacific Economic Cooperation (APEC).\textsuperscript{20}

However, APEC, as the main discussion forum, faces challenges from both within and outside. Its hollow dialogues agenda jeopardizes its effectiveness, and the difficulty of reaching consensus undermines its function. Moreover, growing initiatives led by Asia-Pacific powers outside the council’s scope further undermine APEC’s relevance.

Chile has actively pursued a holistic vision of the Pacific, extending beyond business and geopolitics to prioritize environmental preservation, marine life, and the promotion of multilateral cooperation. The country hosted significant events such as the Our Ocean Conference (2015), APEC Summit (2019), COP-26 (2019), and United Nations National Adaptation Plan Conference (2023). With the leadership of its military, Chile is actively working towards a development model that incorporates the significance of the Pacific Ocean. Publications such as the 2017 White Book of Defense, the 2018 Chilean Oceanic Policy, the 2020 Defense Policy, and the 2023 National Oceanic Program highlight Chile’s dedication to surpassing traditional models.

However, Chile is not a participant in the Indo-Pacific Economic Framework for Prosperity (IPEF), a multilateral organization that brings together 14 major countries of the region. The IPEF focuses on four key pillars: free trade, security of supply chains, clean economy, and fair economy.

As the only South American country with a truly tricontinental geographic situation, with Easter Island as its most westward position in Polynesia, Chile faces several challenges and issues in the maritime spaces of the Pacific. These include


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The exploitation of sea lines of communications (SLOC) by organized crime for illegal activities such as piracy, drug trafficking, and money laundering. Chile also grapples with pollution concerns in fluid spaces and the problem of illegal, unregulated, and undeclared fishing activities (IUUF), particularly concerning highly migratory fish stocks under the New York Agreement. Furthermore, Chile is committed to the nuclear weapons-free zone established by the Pelindaba Treaty. These challenges highlight the complexities Chile must address.

Additionally, there is potential for bilateral dialogues with other countries in areas such as geothermal energy with the Philippines or increased engagement with the Pacific Islands, offering avenues for further exploration and cooperation.

Approximately 60 percent of Chilean export goods are shipped to the Asia-Pacific region, with 90 percent of these exports transported by sea. Chile’s position in the Indo-Pacific is influenced by its political relationships with other countries in the region. Chile maintains strong diplomatic ties with Australia, New Zealand, and Japan, which have been further strengthened through high-level visits, diplomatic exchanges, and participation in regional organizations like the APEC forum.

In recent years, Chile has actively increased its military engagement in the Indo-Pacific region. This includes participating in joint military exercises with the United States, Japan, Australia, and South Korea. Additionally, the Chilean Navy has deployed its vessels as part of multinational task forces in the South China Sea. Chile has developed a medium-sized Navy with blue-water capabilities and possesses the strongest air force in Latin America. The country maintains NATO-standard training and equipment, ensuring readiness to tackle multinational challenges if the need arises. These military considerations demonstrate Chile’s recognition of the strategic significance of the Indo-Pacific region and its determination to assume a more active role in regional security.

Despite its growing presence in the Indo-Pacific, Chile faces several challenges in the region. One of the biggest challenges is the competition between major powers such as the United States, China, and India, which has led to tensions and...

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instability. Chile aims to maintain a neutral stance in this competition and carefully balance its relationships with these major powers to avoid being caught in the middle of a geopolitical conflict.24

Like many Latin American countries, Chile has a strong economic partnership with China, while also holding a strategic position aligned with the United States. In 2022, Chile’s exports to China increased by 5.3 percent, outpacing the overall export growth of 3 percent25. China’s share of Chilean exports has grown from 24.8 percent in 2013 to 39.4 percent in 2022, with total sales to China amounting to USD 38.447 million. The United States is Chile’s second-largest economic partner with sales totaling USD 13.587 million, representing one-third of China’s market.26 In terms of imports, China accounts for 30.9 percent of total imports, while 17.8 percent come from the United States.27 Despite the economic dependency, Chile maintains a strategic position aligned with the United States, rooted in a commitment to democratic values, economic integration, open markets, and increased cooperation in areas such as technology, energy, education, fifth-generation communications, as well as addressing global challenges in security and development.28

Another challenge that Chile must face is the lack of infrastructure and connectivity between South America and the Indo-Pacific. This limitation hinders Chile’s ability to fully leverage its geographical position and expand economic ties with the region.29 It is also a key element for Chile to achieve its long-desired geopolitical position as a logistics hub for South America.30 Chile also faces competition from projects developed by its competitors, such as the joint project between China and Peru to construct a mega port facility in Chancay, as well as the desire to build a Nicaraguan alternative to the Panama Canal.31 However, Chile has been

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26 Cofré, “China sigue aumentando su peso.”
30 Wilhelmy, “La trayectoria de Chile frente a la región Asia-Pacífico.”
31 Arias Mendoza et al., “Análisis comparativo del nuevo proyecto canal de Nicaragua frente al actual Canal de Panamá: beneficio económico e impacto en el comercio internacional del Perú” (tesis, Universidad Pe-
actively addressing this challenge through initiatives like the Bi-Oceanic Train. This initiative focuses on improving connectivity between Latin America and the Asia-Pacific region by leveraging Chilean ports and developing transportation and logistics infrastructure.\textsuperscript{32} If Chile aims to develop as a logistics hub for the South American economy, it must establish a long-lasting public-private partnership (PPP). This partnership is crucial given the pressing timelines for energy and infrastructure development, which are essential to maintain a competitive advantage over rivals.

Chile also faces challenges regarding India. The US government has broadened the scope of strategic competition to encompass the entire Indo-Pacific region. Until 2020, Chile’s strategy had primarily focused on the Asia-Pacific, but the pandemic and India’s “vaccine diplomacy” have revealed India as an appealing partner for Chilean interests.\textsuperscript{33} Trade between the two countries experienced sustained growth since 2020, with a 5-percent increase between 2015 and 2019.\textsuperscript{34} According to Chile, “India has become increasingly important for Chilean trade, as it has emerged as a major player in the global economy, exhibiting dynamic growth and institutional stability, and ranking as the third-largest economic power in Asia and the fifth-largest in the world.”\textsuperscript{35} India, with its unaligned foreign policy toward China and the U.S., is emerging as a new force in an already shifting global landscape.\textsuperscript{36} For Chile, it adds another variable to an already contested scenario, particularly when trying to navigate a neutral stance amid intense great-power competition.

Even though Chile has expressed its willingness to engage with the Indo-Pacific, its political strategy appears to face limitations in penetrating beyond the Malacca Strait. Whether at a bilateral level or within multilateral institutions, Chile’s presence in the Indian Basin has remained inconsequential, rendering it an insignificant

\textsuperscript{32} Jaime Quintana, “Corredor Bioceánico: una gran oportunidad de desarrollo para Chile,” Columna de Opinión, 7 June 2022, https://www.senado.cl/.


actor in the region. Even the expansion of the 2006 Free Trade Agreement with India in 2017 failed to facilitate a deeper cultural, security, or political influence, hindering the achievement of a more favorable strategic position in the evolving world order.

The current scenario, with Chile’s major economic partner embroiled in a cold dispute with its primary strategic partner, falls far from ideal. The involvement of India as a rapidly growing country, along with middle powers like Australia, New Zealand, Japan, and the Republic of Korea, adds complexity to Chile’s engagement in the Indo-Pacific. Amid great-power competition, Chile must navigate the Pacific waters wisely to mitigate risks. However, it is important to note that when the stakes are high, the rewards can also be significant.

Given the circumstances, it becomes evident that actions, rather than mere words, must be taken to safeguard Chile’s interests in the Pacific. This entails effectively engaging with world powers and securing a favorable position that ensures the best possible outcome for the Chilean people, enabling them to reap the benefits of a globalized world.

**Conclusion**

In summary, Chile’s geographical location, economic interests, and political relationships with other countries shape its position in the Indo-Pacific. While Chile has made significant progress in expanding its presence in the region, it still faces challenges, including geopolitical tensions and a lack of connectivity. However, Chile’s increasing engagement in the Indo-Pacific demonstrates its recognition of the region’s strategic importance and its desire to play an active role in shaping its future. In the 21st century, the ability to project political action into maritime spaces, particularly in the Indo-Pacific, holds the key to geopolitical development. Chile has a crucial task ahead: defining the role it wants to assume in the Pacific Century. Unlike other aspiring regional powers such as Brazil and Argentina, Chile is well-positioned to go beyond being a mere spectator.37

Many challenges in the twenty-first century have their roots in maritime spaces that extend beyond the scope of sovereignty defined by UN Convention on the Law of the Sea (UNCLOS). Chile must decide whether to lead the response to address these issues or let others take the initiative. Will Chile assume the benefits, costs, and responsibilities of being a middle power in the Asia-Pacific? With the

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rise of powers in an inherently unstable region, there are roles to be played by the United States, China, India, as well as middle power states, NGOs, multilateral organizations, informal actors, multinational companies, and private entities. Chile’s active participation and a deeper understanding of long-term political agreements are required to be considered a relevant actor and seize the opportunities of the Pacific Century. As the story at the beginning illustrates, Chile has the choice to be either the Hen or the Hog, to be merely involved or truly engaged in the Indo-Pacific concept. Failing to decide could result in a missed opportunity for development and well-being for its people. ☑

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COMMENTARY

Women, Peace, and Security

An Underutilized Tool in Countering the People’s Republic of China in the US Southern Command Area of Responsibility

Maj Christine Martinez, USAF

Abstract

In the face of increasing People’s Republic of China (PRC) influence within the US Southern Command’s (SOUTHCOM) area of responsibility (AOR), the United States must adopt innovative approaches to maintain its strategic advantage and strengthen international partnerships. One potent tool is the Women, Peace, and Security (WPS) Program, which promotes the inclusion of women in peace and security efforts globally. AFSOUTH, the Air Component of SOUTHCOM, exemplifies the successful implementation of WPS principles, fostering lasting relationships with partner nation air forces. By identifying barriers and sharing best practices related to gender perspectives, AFSOUTH enhances opportunities for half of partner nation populations in a non-escalatory and transparent manner. Such commitment to democratic values and human rights strengthens existing relationships and positions the United States as a leader in WPS initiatives, contrasting the PRC’s limited efforts in this realm. Through continued progress in implementing WPS, the United States can further solidify its strategic position and promote cooperation in the Western Hemisphere.

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The United States military must devise innovative approaches to preserve its strategic advantage and counter People’s Republic of China (PRC) influence in the US Southern Command (SOUTHCOM) area of responsibility (AOR). As SOUTHCOM Commander General Laura Richardson acknowledges, the PRC employs various methods to enhance its power in the region, encompassing increased trade with regional countries and investments in potential dual-use military infrastructure and technology.¹ Partners in the SOUTHCOM AOR, facing budgetary constraints and not viewing the PRC as an immediate threat as the United States does, find the PRC’s seemingly indiscriminate investments appealing in the short-term. However, countering the PRC with the current set of tools presents challenges due to the nature of the United States as a true democracy. The US government lacks the ability to directly control or compel private investment and trade with countries in the

¹ “Statement of General Laura J. Richardson Commander, United States Southern Command before the 118th Congress,” 8 March 2023, 2–3, https://www.southcom.mil/.
SOUTHCOM AOR, and numerous limitations and regulations hinder engagement in security cooperation with human rights abusers. Additionally, the United States’ foreign military sales processes can be sluggish and frustrating for international partners confronting urgent security threats.

While the United States should indeed seek to streamline the use of existing security cooperation tools to counter PRC influence in the region, it should also explore underutilized tools that offer long-term benefits to partner nations in the SOUTHCOM AOR, aligning with the strengths of democracies. One such soft power tool currently employed by SOUTHCOM and its Air Component, Air Forces Southern (AFSOUTH), is the Women, Peace, and Security (WPS) Program.

WPS is not unique to SOUTHCOM or even to the US Department of Defense. It originates from United Nations Resolution 1325, adopted by the UN Security Council in 2000, and aims to increase the inclusion of women in global peace and security efforts. This resolution acknowledges the historical exclusion of women from such initiatives and cites data indicating that women’s participation in peace and conflict resolution can lead to longer-lasting outcomes. In 2011, the United States created a National Action Plan for WPS, which was subsequently superseded by the US Strategy on WPS in 2019. Moreover, the WPS Act of 2017 assigned four US agencies the responsibility for implementing WPS: the Department of Homeland Security, the Department of State, the US Agency for International Development (USAID), and the Department of Defense. In 2020, the Department of Defense released its Women, Peace, and Security Strategic Framework and Implementation Plan, while geographic combatant commands were directed to establish their own WPS programs.

SOUTHCOM places WPS as a priority under its first line of effort, “Strengthening Partnerships,” with a dedicated team reporting directly to the SOUTHCOM civilian deputy to the commander. The WPS team receives dedicated resources to conduct engagements throughout the AOR annually. One of the WPS team’s responsibilities involves “Encouraging our partners to implement policies, plans,
and structural changes that enhance the meaningful participation of women in decision-making processes related to peace and security.” Additionally, General Richardson emphasizes the importance of WPS in senior leader–level dialogues. In her recent 2023 posture statement to Congress, she articulated, “Our main objective is to maximize the talents of the force through recruitment, retention, training, and advancement.”

Apart from advocating for WPS, SOUTHCOM actively leads and participates in various conferences, including symposiums, subject matter expert exchanges, key leader engagements, and staff talks with partner nations. These events serve as platforms for discussing advancements, obstacles, and the significance of WPS in the region. Furthermore, SOUTHCOM hosts the “Breaking Barriers” podcast series, featuring senior leaders from partner nations sharing their experiences to inspire future generations.

As the air component to SOUTHCOM, Air Forces Southern (AFSOUTH) designates an O-6 officer as the lead for WPS within the component. The current AFSOUTH WPS lead envisions integrating WPS principles into as many partner nation engagements as possible. Notably, this involves incorporating WPS components into major military exercises and including educational materials on the WPS program and US gender integration efforts in subject matter expert exchanges, mobile training team events, and conferences.

The publication of strategic-level guidance documents, such as the US Strategy on WPS, the DoD WPS Strategic Framework and Implementation Plan, and the development of objectives and staffs within the Department of Defense, all the way down to the component level, clearly signals the United States’ commitment to the principles of WPS. In contrast, the same cannot be said of the PRC. In 2020, when Russia introduced a new Women, Peace, and Security resolution to the UN Security Council, which featured diminished language on the commitment to protect the human rights of women, the PRC was one of the five countries that voted to pass the resolution. Additionally, as of February 2023, while 104 member countries of the United Nations, including the United States in 2011, have adopted national action plans on WPS, the PRC has not done so.

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8 “SOUTHCOM Women, Peace, and Security (WPS) Program.”
9 “Statement of General Laura J. Richardson Commander, United States Southern Command,” 29.
10 “SOUTHCOM Women, Peace, and Security (WPS) Program.”
The People’s Liberation Army (PLA) exhibits a lack of women in senior leadership positions, according to a 2022 report by the US–China Economic and Security Review Commission, with only two females ever having been promoted to the rank of lieutenant general.\(^{13}\) Moreover, according to the Women, Peace, and Security Index, developed by the Georgetown Institute for WPS and the Peace Research Institute Oslo, which assesses countries based on the status and empowerment of women, taking into account dimensions of inclusion, justice, and security, the PRC was ranked 89 out of 170 countries in its last iteration in 2021–2022. By comparison, the United States was ranked 21.\(^{14}\)

While the PRC may publicly declare its support for WPS, these statistics indicate that the PRC is still weak in this area, lagging behind many countries in the SOUTHCOM AOR. For the PRC to begin exporting its doctrine to countries in the SOUTHCOM AOR, many of which outrank the PRC in the aforementioned WPS index, it would need to make significant advances in this domain.

In contrast to the PRC’s transactional approach towards the region, the advantage of having a dedicated team running a WPS program at the Air Force component level is that it fosters the establishment of meaningful and enduring relationships between the United States and partner nation air forces. By collaboratively identifying barriers, devising solutions, and sharing best practices related to the inclusion of gender perspectives into air force policy, AFSOUTH generates significant opportunities for half of the partner nation populations in a non-escalatory and transparent manner. The next generation of partner nation senior leaders in the SOUTHCOM AOR is likely to include more women who recognize the US role in spearheading discussions that have directly influenced their own empowerment.

Moreover, signaling commitment to shared democratic values, ideas, and narratives with partner nations strengthens the existing relationships. Embracing the WPS initiative entails dedicating oneself to safeguarding human rights and promoting equal opportunities. This commitment is not solely an agenda of the United States; rather, it enjoys well-established multilateral support through the United Nations.


Another advantage of using WPS to counter PRC influence is the relatively low cost of WPS events compared to defense equipment purchases and large-scale exercises and training events. Regional WPS conferences or seminars can encompass multiple partners in a single event, and existing security cooperation events can be easily adapted to include dedicated time for WPS-focused discussions. In 2022, the Office of the Secretary of Defense allocated designated resourcing for SOUTHCOM’s WPS program, supplemented by funding from SOUTHCOM’s Traditional Commander’s Activities budget for additional WPS events. AFSOUTH successfully executed multiple WPS events within its existing budgets for Traditional Commander’s Activities and partner nation exercises, without a specific funding source dedicated solely to WPS. Although the Department of Defense budget for WPS is limited compared to other programs, SOUTHCOM has already witnessed positive results. In General Richardson’s 2023 posture statement to Congress, she highlights several “firsts” for partner nations, including the achievement of several women attaining senior leadership positions in the past year.\(^{15}\)

In 2023, AFSOUTH has already observed the benefits of WPS in partner nation engagements. Early in the year, AFSOUTH led SOUTHCOM’s Lesser Antilles Medical Assistance Team (LAMAT) operation to Guyana, Suriname, and Saint Lucia, providing medical care to over one thousand patients across the three countries over a two-month period. AFSOUTH strategically emphasized the role of its female military medical professionals in the team to encourage women in partner nation countries to feel secure in receiving care during the operation and to inspire partner nation females to consider careers in the military.

AFSOUTH is also making a concerted effort to include WPS in its partner nation exercises. In exercise Resolute Sentinel 2023, SOUTHCOM’s joint, combined, multinational, air-centric field training exercise, WPS was a strategic messaging theme throughout the planning and execution of the exercise. Consequently, engagements within the exercise included a WPS component. Female space specialists from the Colombian Air Force participated in the space component of the exercise and subsequently spoke at the Colombian Air Force Academy to inspire the future generation of leaders to consider careers in space. Additionally, as part of Resolute Sentinel 2023, AFSOUTH led a seminar focused on international law, featuring the Air Force’s Victim Council, which prompted interest from partner nations, including the Colombian and Peruvian Air Forces, in incorporating victim advocacy for victims of sexual assault into their own forces. Finally, as part of Resolute Sentinel 2023, partner nations were encouraged to consider female

\(^{15}\)“Statement of General Laura J. Richardson Commander, United States Southern Command,” 27–28.
personnel for selection to participate in the Combined Joint Task Force (CJTF) Headquarters planning cell. Several of the CJTF planners were female officers from operational backgrounds who took on leadership roles during the exercise. These are just a few examples of how AFSOUTH incorporates WPS into existing and ongoing efforts.

**Recommendations**

To maintain its current strategic advantage with partner nations in the SOUTHCOM AOR, the United States must continue progressing the implementation of WPS in SOUTHCOM and AFSOUTH programs. AFSOUTH should actively seek opportunities to collaborate with other components, fostering a truly joint approach to partner nations. By sharing different service perspectives on the challenges of women’s inclusion, increased collaboration and innovative solutions can be achieved. Furthermore, SOUTHCOM and AFSOUTH should continue to cross-collaborate with other geographic combatant commands, promoting a cohesive and unified effort.

To ensure effective WPS implementation, both SOUTHCOM and AFSOUTH must prioritize personnel understanding of the program. Given that the WPS program at SOUTHCOM is relatively new, efforts should be made to educate personnel about its background and objectives. This can be accomplished by providing and encouraging free online training for military and civil service employees, while also offering in-person resources for those interested in delving deeper into WPS. AFSOUTH has been proactive in this aspect by establishing a robust WPS volunteer program that requires members to undergo WPS training. Additionally, AFSOUTH hosts periodic WPS-themed luncheons and professional development seminars open to all personnel.

Data gathering mechanisms for WPS initiatives should be a priority for SOUTHCOM and AFSOUTH. In 2020, SOUTHCOM commissioned the nongovernmental organization Women in International Security to conduct a quantitative and qualitative assessment of gender integration progress in partner nation militaries and national police forces of 14 countries in the AOR. Additionally, SOUTHCOM tracks gender-disaggregated data for partner nation students who have attended International Military Education and Training courses. AFSOUTH is working to collect gender-disaggregated data for exercise participants during Resolute Sentinel in 2023. These efforts are crucial for tracking progress and advocating for future WPS initiatives.

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WPS offers SOUTHCOM, AFSOUTH, and partner nations in the AOR a relationship-based partnership founded on the shared democratic value of equal opportunity. While the PRC may publicly proclaim commitment to WPS at the United Nations, its actions in implementing WPS in the PLA and its partnership with Latin America remain limited. In contrast, the United States, having demonstrated sustained commitment to gender inclusion within its own military and engagements with partner nations, is better suited to lead WPS initiatives and dialogues in the region. As more women assume leadership positions in both the US and partner nation militaries, the shared understanding and commitment to WPS principles provide a common ground to foster strong military relationships, ultimately leading to increased cooperation in the Western Hemisphere.

Maj Christine Martinez, USAF

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Lula’s Return
Overview and Opportunities for Technological and Industrial Partnership

FABIO GOMES DOS SANTOS

Abstract

Luiz Inácio “Lula” da Silva’s 2023 re-election as Brazil’s President, despite a tumultuous journey from trade unionism to political leadership, underscores his enduring influence. This article explores Lula’s impact on Brazil’s political landscape, particularly his polarization with conservative figure Jair Bolsonaro. The divergent international and science and technology policies of their terms are examined, illuminating Lula’s South–South focus and Bolsonaro’s alignment with far-right leaders. Amid economic challenges and the pandemic aftermath, Lula’s return signals a potential shift toward innovative techno-industrial partnerships for Brazil’s recovery. The article highlights the prospects of collaboration with major trading partners, China and the United States, as avenues for revitalizing Brazil’s industrial sector. Lula’s role in redefining Brazil’s international outlook and positioning it for technological growth in his third term emerges as a critical theme.

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Luiz Inácio “Lula” da Silva’s re-election as president in 2023 completes an extraordinary trajectory, perhaps even exceeding the imagination of Brazilian soap opera writers. Rooted in 1980s trade unionism, Lula poised himself to become a central figure in the Partido dos Trabalhadores (PT), Brazil’s largest left-wing party. He consistently occupied the national political stage, securing his first presidential term in 2002, followed by re-election in 2006. His high approval ratings empowered him to nominate the non-candidate Dilma Rousseff as his presidential successor.

Emerging as Lula’s adversary was Jair Bolsonaro, a former military officer whose initial support base encompassed military and police personnel seeking improved wages. Bolsonaro effectively unified diverse conservative and neoliberal currents within Brazilian society, countering the progressive and distributive policies implemented by PT in previous decades.

In 2023, Lula resumed leadership in a nation marked by palpable tension. His victory, secured with a narrow 50.9 percent of Brazilian votes, contrasted with Bolsonaro’s delayed acceptance of the result. Bolsonaro’s response included fleeing to Florida upon the end of his term, fearing arrest due to allegations of corruption, mismanagement, and antidemocratic actions. Notably, despite this, Bolsonaro
incited his supporters to storm the Brazilian Powers’ headquarters on January 8, evoking tragic parallels to the 6 January 2021 US Capitol riot.

In the wake of low economic growth, pandemic devastation, and the disastrous public management of Bolsonaro’s tenure, Brazil faces a compelling need for rebuilding. This article broadly addresses the industrial and technological aspects of this reconstruction.

**Brazilian Industrial and Science and Technology Landscape**

Like other countries in its region, Brazil’s industrialization traces its roots to import substitution movements in the first half of the twentieth century. State-led initiatives from the 1940s to the 1960s facilitated the establishment of state-owned strategic entities, including PETROBRÁS (oil) and Companhia Siderúrgica Nacional (CSN) (steel). Efforts to allure foreign investments, particularly in the automotive sector, reshaped Brazil’s economy from its traditional agricultural focus into a more intricate structure.

Brazil’s science and technology (S&T) infrastructure is also a product of government endeavors. During the 1960s, a National System of Science and Technology was developed to foster domestic nuclear advancements. Through the 1970s and beyond, despite enduring a military dictatorship, the significance of S&T for economic growth gained recognition. This led to the establishment of additional state-owned enterprises, such as EMBRAER (aeronautics) and EMBRAPA (agricultural technology development and dissemination).

However, Brazil entered the second decade of the twenty-first century in a precarious state. Like many Western nations, it grapples with deindustrialization. In 2022, the nation ranked twelfth in global economies by gross domestic product (GDP). Top exports in 2020 included soybeans (USD 28.6B), iron (USD 26.5B), crude oil (USD 19.8B), unrefined sugar (USD 8.95B), and frozen bovine meat (USD 6.69B). Principal imports encompassed refined petroleum (USD 7.91B), motor vehicle parts and accessories (USD 5.42B), pesticides (USD 3.73B), integrated circuits (USD 3.66B), and packaged medicaments (USD 3.2B). Notably, China and the United States stand as its primary trading partners, highlighting a persistent dependence on agriculture and extractive industries. The specter of deindustrialization exacerbates this reality.

Brazil’s economic activity predominantly concentrates in sectors with lower technological intensity, resulting in scarce large-scale business investments in re-

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Lula’s Return

A mere 33.6 percent of Brazilian companies generated innovations between 2015 and 2017. While pockets of technological dynamism exist in fields like agriculture, energy, healthcare (given Brazil’s universal public healthcare system), and financial services, they remain exceptions. Public universities like Universidade de São Paulo and Unicamp, alongside federal government bodies, spearhead the bulk of scientific and technological research. Research institutions, primarily associated with universities or the government, are few. The Instituto Tecnológico de Aeronáutica (ITA), a focal point for the Brazilian aeronautics industry, epitomizes this pattern.

Stark Differences in International and Science-and-Technology Policies

Lula’s and Bolsonaro’s terms exhibited stark divergence in international and S&T policies. During Lula’s presidency (2003–2011), he astutely recognized the potential of expanding South–South connections to amplify Brazilian influence. This encompassed enlarging the South Common Market (MERCOSUR), fostering relationships with African nations, and forging ties with Russia, China, and India. Acknowledging international organizations and diplomatic negotiations as tools for leadership in a multipolar world, Lula aimed to counter the dominance of wealthier countries.

Lula’s first term saw the introduction of PITCE (Industrial, Technological, and Foreign Trade Policy), which prioritized industries like semiconductors, software, capital goods, and pharmaceuticals, along with technologies such as biotechnology, nanotechnology, and alternative energy. Despite some government focus loss during the 2008 crisis, a successful tradition of public coordination was reinstated from the outset of his rule. Concurrently, higher education witnessed expansion, marked by the creation of federal universities and scholarship/funding programs like Prouni and FIES. These measures were crucial as Brazil depended on educational institutions for research and grappled with a dearth of qualified workforce compared to other developing nations.

In contrast, Bolsonaro’s administration (2019–2022) veered in the opposite direction. His personal interests overshadowed the guidance of the esteemed national diplomatic corps, aligning the country with the Trump Administration and adopting the tactics of far-right leaders like Viktor Orbán. Multilateral body criticism

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and disregard for issues of international importance, such as environmental concerns, became common. Strained relations with key partners like China contradicted well-established foreign policy norms.

Discrepancies extended to industrial and S&T policies as well. Bolsonaro’s approach eschewed government coordination, advocating instead for free-market practices to spur industrial and technological progress. This perspective led to lackluster industrial performance and hesitance in the face of critical needs, such as ramping up industrial capacity to produce vaccines during the height of the COVID-19 pandemic. Notably, Bolsonaro’s tenure also witnessed tension with the scientific community, marked by substantial budget cuts to education and research. Moreover, his questioning of vaccine effectiveness and scientific knowledge further strained relations.

**Lula’s Third Term and Techno-industrial Partnerships as Opportunities**

Lula resumes governance over a country veering in an opposite trajectory from when he departed. These disparities extend beyond mere political orientation, encompassing substantial gaps in management capacity that plague the daily administration of public affairs. The new government’s motto, “Union and Reconstruction,” aptly reflects the challenges ahead.

Fortuitously, signs of change have emerged. Brazil has repositioned itself as a global advocate for environmental issues and the battle against income inequality. The reception has been positive. The Amazonia Fund, a European initiative truncated during Bolsonaro’s rule, has been reinstated, with the United States contemplating participation.

Brazil is poised to embrace pragmatic diplomacy and avoid automatic alignment in the face of contentious issues. A heightened dialogue with the international community welcomes innovative solutions for the nation’s problems. This dynamic environment offers prospects for fresh international collaborations, particularly techno-industrial partnerships, with reindustrialization as a central priority for the new term. Notably, potential alliances with China and the United States, Brazil’s primary trading partners, warrant consideration.

Sino-Brazilian diplomatic ties, restored in 1974 following Brazil’s support for Taiwan post-World War II, have yielded valuable outcomes like the China-Brazil Earth-Resources Satellite (CBERS). CBERS satellites, including the upcoming CBERS-4 stage, provide vital images for environmental preservation and resource
management. Beyond operational value, the data generated supports diverse Brazilian technologies impacting agriculture and urban management.4

Massive Chinese investments have spurred innovations, from modernizing national electrical infrastructure to revitalizing a waning auto industry. Chinese technologies frequently emerge as options for Brazilian companies, exemplified by the 5G auction. Despite Huawei-related controversies and pressure from the Trump Administration, Brazil restricted participation to existing telephony operators. China’s role as a major supplier to local operators remained intact, showcasing its commitment to sharing industrial and technological advances with Brazil.

The United States of America has older historical ties with Brazil and forged no less significant techno-industrial partnerships with it. The U.S. support for the creation of the CSN is a famous example. A key component of Brazilian industrialization during the twentieth century, CSN was the result of diplomatic arrangements that sealed Brazil’s participation in the Second World War. It was, therefore, with a partnership of this kind that Brazil paved its way to become less dependent on imports.

Facing shared deindustrialization challenges, Brazil and the United States have potential for cooperation. The CHIPS and Science Act, an ambitious U.S. initiative to enhance semiconductor production, aligns with President Joe Biden’s strategic goal of reducing reliance on Asian imports. This endeavor could become a pivotal American industrial policy.

Brazil’s efforts to counter dependency began earlier, as seen in the establishment of Centro Nacional de Tecnologia Eletrônica Avançada (CEITEC) in 2008. Despite significant public investment, CEITEC, a rare integrated circuit producer owned by the Brazilian Federal Government, faced near-closure under Bolsonaro due to perceived lack of profitability amid global trends of bolstering local production.

Lula’s government has fortunately committed to maintaining CEITEC’s operations and channeling new investment.5 As Brazil and the U.S. endeavor to foster this industry and reduce reliance on foreign suppliers, potential synergies could lead to novel supply chains, collaborative R&D endeavors, and technology transfer projects. These measures would undoubtedly find a warm reception in Brazil. ☀

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