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Brazilian Hybrid Security in South America

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Abstract

Existing research on security governance in South America functions on dichotomous lines. Analysis of Brazil's security practices is a case in point. On the one hand, scholars point out the balance of power and hegemonic institutions as the main discourse in the security practices between Brazil and its South American neighbors. On the other hand, some other emphasize the importance of democracy, cooperation on defense and security, and peaceful conflict resolution between states in the region as indicators for the emergence of a security community between Brazil and its neighbors in the South American region. The way in which multiple orders coexist is not given adequate attention in empirical research. This article seeks to overcome this dichotomy. By foregrounding Brazil's regional security practices, particularly during the Lula and Rousseff administration, I show the hybrid and sometimes ambivalent security governance system in Brazil, where mechanisms of balance of power and security community overlap in important ways.

Keywords: Hybrid security, Balance of power in South America, Security communities, Brazilian defense policy.

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Introduction

In the empirical analysis of security practices in the South American region, most scholars broadly tend to work within exclusivist set of mechanisms and explanans of security governance. Prominently, this order of explanation rests on the balance of power mechanisms, security community, and hybrid peace in the South American region. While this shows the fruitful contentions and debates between multiple scholars on regional security order, unfortunately it has also led to an exclusivist explanation. For example, scholars such as Battaglini develop the notion of South America as a zone of hybrid peace. It is:

Characterized by the simultaneous presence of (1) resolved disputes that may become militarized, yet without escalating to an intermediate armed

conflict or war; (2) democracies that maintain dense economic relations with their neighboring countries; and (3) regional norms and institutions (both old and new) that help to resolve disputes peacefully. The most relevant cases of hybrid peace in South America are Chile-Peru since 1990 and Colombia-Venezuela since 1991. (Battaglino 2012, 142)

Other scholars resort to mechanisms of balance of power and provide their explanation of regional security order. For example, David Mares (2001; 2012a) and Mares and Bernstein (1998) challenge the argument that Latin America is a “zone of peace” by pointing out the various sources of tensions and escalation dynamics involved in militarized interstate disputes in the region. Specifically, border disputes, illegal trade, drugs, and power of organized crime, conflict over ideological, energy, and natural resources betrays – in their contention – any hybrid peace in the region. Some other scholars like Pion-Berlin and Trinkunas (2011) resort to progressive order explanation and suggest that Latin American governments have to develop hybrid forces that do not answer either to the police or military (or carry their historical baggage), but rather have their own structure, hierarchy, mission, and training to manage the security order. Such forces, then, would have to balance the requisites of security with the protection of fundamental human rights (Pion-Berlin and Trinkunas 2011, 48). Thus, each of these explanations resort to an exclusive emphasize on security mechanisms in Latin America, which is either based on militarized interstate dispute in the region as argued by Mares (2012b) or based on well-established practices of mutual trust, principles of diplomacy and international law as argued by Kacowicz (2005) and Herz (2009).

One need not emphasize one sort of regional security order at the cost of other explanations. Accounts that emphasize balance of power in the security practices between states in South America (Mares 2012a; Mello 1996; Rezende 2005) need not exclusively be opposed to accounts based on democracy, cooperation, and culture of peaceful conflict resolution in the region (Hurrell 1998; Leite 2015; Oelsner 2015). This article aims to foreground this idea and thus overcome the current conception of Latin American regional security order in exclusivist terms by engaging with the Brazilian case. Brazil is an important case in Latin American regional security because the set of security practices pursued under the Luiz Inácio Lula da Silva (hereafter Lula) and Dilma Rousseff administrations is an overlap of the balance of power and security community mechanisms. In both administrations, Brazilian policymakers promoted an unprecedented regional integration and cooperation in the field of ‘high politics’ such as security and defense, most prominently through the establishment of the South American Defense Council (*Conselho de Defesa Sul-Americano*) under the umbrella of the Union of South American Nations (UNASUR). Such a mechanism aims at institutionalizing, even at rudimentary levels, a form of security cooperation in the region. Thus, some researchers already tend to look at Brazilian initiatives as equivalent to the creation of security community that forge dependable expectations of peaceful change (Oelsner 2009). At the same time, however, Brazilian policymakers, under both administrations have also increased Brazil’s military spending through the purchase of sophisticated weapons from Western European countries. This also shows the idea of

balance of power and regional hegemony are still relevant concepts in understanding contemporary security relations among Brazil and some South American countries.

In other words, Brazil is an important case because military institutions still adhere to the balance of power thinking and practices, while other parts of the policy-making bureaucracy, such as the diplomatic corps, have deeply internalized security community discourses and practices (Flemes and Radseck 2012). The coexistence of the logics of the balance of power and security community is not a new phenomenon in Brazil, at least with regard to the South American context. On the one hand, violence is prevalent in the region due to long periods of authoritarian rule and military coups, intra-state conflict, and a high incidence of criminality. On the other hand, over the past century, there were only a handful of wars in the region, and South Americans no longer fear aggressions from their neighbors. Brazil itself participated in wars against its neighbors more than 150 years ago. Inter-state wars have seldom occurred, and there is a long-standing normative consensus on peaceful conflict management. Thus, phases of heightened tensions and increased military armament have alternated or even overlapped with phases of peace, cooperation, and trust building (Villa and Weiffen 2014).

In order to comprehend this overlap between Brazil's security governance in the South America region, the framework of overlapping regional security mechanisms provided by Adler and Greve is very helpful (2009). In this article, I utilize this framework to shed light on the processes and mechanisms involved in the Brazilian hybrid security practices. As such, it aims to contribute to the further understanding the empirical consequences of hybrid security on regional security governance.

Adler and Greve contend that "while analytically and normatively distinct, radically different orders, and in particular, the security systems of governance on which they are based (such as Balance of power and security community), often coexist or overlap in political discourse and practice" (2009, 60). Let us analytically dissect Adler and Greve's discussion in order to foreground such an overlapping security governance system in the South American region, and demonstrate why a detailed empirical investigation is warranted.

Security community rests on the institutionalized expectation of peaceful change. Founded on the research of Karl Deutsch (1957), security communities were conceptualized by Adler and Barnett (1998, 29-65) as transnational regions comprised of sovereign states, whose people maintain the expectation that the members of the community will not fight each other physically and will resolve any conflictive issues by peaceful means. A necessary, but not sufficient condition for the emergence of a security community is the absence of war among the states. Adler and Greve (2009) have specified five conditions which could present a security community. First, the reliable expectations of peaceful change or dealing with conflict are based on the practice of self-restraint or abstention from use of force. Second, the actors who constitute security communities align efforts toward joint ventures, projects, and partnerships, thus bringing the security community to daily peace practices. Third, "cooperative security", which is indivisible and comprehensive, is the 'natural' practice of security communities. Fourth, diplomacy is a consultation standard and practice of multilateral decision-making, it underlies community security mechanism. Therefore,

institutionalized states guarantee a security community rather than the deterrence of it. Fifth, the security community mechanism includes a provision to spread the community “out” through explicit or implicit practices of learning and socialization.

Clearly, scholars recognize the existence of at least a partial security community in the Latin American region, specifically in the Southern Cone – Argentina, Brazil, Chile, and Uruguay, where regimes on security and defense, democratic institutions, confidence-building measures, and economic institutions have thrived since the end of the 1990s. When set against security practices in other parts of Latin America such the Andean and the Central American Regions, clearly one could discuss of the security community in the Southern Cone (Buzan and Weaver 2003; Dominguez 2007; Hurrell 1998; Kacowicz 1998, 2005; Olster 2009, 2015).

Similarly, the balance of power mechanisms focuses on competing capabilities of states aimed with mutual insecurity on each other’s intentions. Adler and Greve understand balance of power mechanism as one that “rests on the notion of the international system as being composed of competing centers of power that are arranged according to their relative capabilities and are, in the absence of an overarching authority, locked in to the security dilemma which might generate prisoner-dilemma of arms race and wars” (2009, 67). In the Latin American region, scholars also agree on the existence of balance of power mechanisms, and as the discussions on Brazil’s military modernization plans show, they are crucially relevant in the region.

However, merely pointing out the existence of these two institutions is not enough, and the onus of responsibility lies in detailed empirical research that shows the overlap functions in actual cases. Thus, using the Brazilian case in this article, I aim to go beyond the existing debates to empirically show the comparative advantage of the overlap between security governance systems. In this manner, this article uses the framework of Adler and Greve and joins forces to shed light on new ways of conceptualizing regional security orders.

The structure of this article is as follows. Having briefly established the framework of overlapping security governance mechanisms in the introduction, the core of the article is on the empirics of Brazil, which will be developed along three areas. Specifically, I will show the overlapping and hybrid security governance in South America in Brazil’s military modernization initiatives, its multilateral engagements, and its bilateral relations with Argentina. In each of these areas, I shed light on the processes and mechanisms through which the Brazilian hybrid security operates on. In the third section of this paper, I conclude with brief remarks on avenues for further research.

Brazil and hybrid regional security governance

We can shed light on the overlapping security governance mechanisms in Brazil in at least three important areas: military modernization, multilateral, and bilateral relations. The processes and mechanisms involved in these three areas fruitfully show the overlap functions in important ways.

Military expenditures and compensating mechanisms of security community

In the area of military modernization, Brazilian security practices work simultaneously on the regional balance of power mechanisms, and on enhancing institutions of the security community. With a consistent emphasis on Confidence Building Measures (CBMs) along with military modernization plans and acquisitions, the Brazilian policymakers' engagement shows important overlapping processes in regional security order.

The Brazilian discourse of cooperation in defense and security has been created in order to build a security community in South America, and this is reiterated by Brazilian decision makers - sometimes even using the very terminology "security community", (Amorim 2011; 2012a; 2012b). This is clear in the speech of a former decision maker for defense and foreign policy – Celso Amorim – in the Lula and Rouseff administrations.

The Brazilian strategy toward South America is strongly cooperative. Then, will the concept of anarchy be appropriate to describe the relationship between our states, which work collectively under the sign of the integration? The concept of "security community" seems to me more appropriate to the reality and, above all, to the goals that we have in South America. In that, the recognition of sovereign right from other states to autonomy is supplemented by the prohibition of war as a form of resolving disputes between members of the community... When we propose a security community "inwards" we cannot let working with the possibility of an external scenario on... unilateral use of force by third states... hence, the dissuasive basis of the Brazilian defense policy (Amorim 2011);

However, Brazil also diligently plans to modernize its military capabilities. In 2007, Brazil decided to modernize and upgrade its Armed Forces, backed up by a strategic relationship with France. Most important was the Franco-Brazil agreement signed in 2009 for the production of four diesel-powered submarines, as well as the country's first nuclear power submarine. The Brazilian Air Force, from 2007 onwards, has also pursued the FX2 project – a program aimed at modernizing its fleet of combat aircraft with the acquisition of 26 fighter jets to replace the outmoded Mirages (Perlo-Freeman et al. 2011; Villa 2008). In 2008, the Air Force announced the three finalist countries to sell the fighter jets¹, and in December 2013, the Brazilian government concluded a protracted decision-making process with an agreement to buy 36 Gripen-NG Aircraft from the Swedish Saab, whose delivery is expected to start in 2018. This purchase aims to boost Brazilian military investment over the next 15 years (Moraes 2013).

Already SIPRI pointed out that the bulk of the regional military build-up resulted from the increase in Brazil's military spending (Perlo-Freeman et al. 2011). Crucially, Brazil's military

1 These companies were: The Swedish Saab (Gripen NG), the French Dassault (Rafale) and the American Boeing (Super Hornet). While the Air Force had a clear, tactically grounded preference for the Swedish Gripen, civilian defense policy-makers opted to pursue a strategic partnership with France with a view to technology transfer (Stratfor, 2008).

expenditure accounts for around fifty-five percent of the region's total, and the country now features among the world's fifteen major military spenders, ranking tenth in 2011 and eleventh in 2012 (SIPRI 2012). Despite the drop in military spending during the Rousseff administration, Brazil continued to work towards goals defined by the Lula administration, for example, the purchase of modern combat aircraft from Swedish companies at the end of 2013 (Santos 2013). The Brazilian military command justified the purchase of sophisticated military weapons citing Venezuela's purchase of Sukoi-30 aircrafts from Russia between 2007 and 2008. This lobby for a bigger military budget and modernization rests on the balance of power thinking, and legitimization that the operational capabilities of the Brazilian Air Force were below those of Chile, Venezuela, and even Peru (Brazil 2007). However, this argumentation for its military modernization plans has created some worries and concerns among South American countries even though Brazil does not have any open territorial disputes with its neighbors.

In this light, Brazil's military modernization has not escaped being interpreted as a typical balance of power practice. During the first decade of the millennium, observers pointed at the competition between Brazil and Venezuela for regional leadership, and suggested that Brazil tried to modernize the inventory of its Armed Forces "with an eye on developments in Venezuela" (IISS 2012, 37). Following Venezuela's support for Bolivia's nationalization of its hydrocarbon industry in May 2006, some sectors in Venezuela pictured a hypothetical war scenario with Brazil, where Venezuela would defend the government of Evo Morales if Brazil sought to control the Bolivian gas fields. In turn, the Brazilian press has called attention to the "Venezuelan Threat" due to the modernization of its Air Force (Brazil 2007).

On the other hand, the modernization of the Brazilian army can also be interpreted by South American countries as if Brazil is acting against Article 3 of the CDS, which deals with the aim of reducing the asymmetries of defense systems in South America. "From 2014, also considering each country's level of investment in the acquisition of new equipment... Brazil continues to lead the ranking with an advantage over the others, because of the size of its military apparatus, but also due to investments that have been made in the re-equipment of the three weapons in the last ten years" (Military Power Review 2014). According to the same source, Brazilian military power is higher than other countries, like Colombia and Chile (almost 45%), Peru, Venezuela and Argentina (of 51% 53% and 55%, respectively), and Ecuador of 78%. "A number of military investments, defense industry restructuring, and until recently the absence of a Defense White Paper, released in 2012, to clarify Brazilian intentions, put Brazil more like a "suspect" than as a partner in South America" (Teixera 2013, 139).

In any case, the project of modernization of the Brazilian Armed Forces is much more than a reaction to the military investments of neighbor countries. In line with the geopolitical concerns of a new regional power, Brazil is conducting a process of securitization of its natural resources – such as energy, water resources, the Amazonian rainforest, agricultural land, and the hydrocarbon resources in the pre-salt maritime zones in the South Atlantic. Therefore, Brazilian decision-makers consider defense investments vital to strengthen Brazil's borders and to protect

the recently discovered offshore oil and gas reserves, which are estimated to hold ten billion barrels of oil. These reserves will reportedly take Brazil from the eleventh position, in the global oil producer rankings, to the world's fifth-largest producer or higher by 2020 (IISS 2012, 37).

Crucially, Brazil under the Lula and Rousseff administration undertook three Confidence Building Measures (CBMs) in order to mitigate suspicions and misrepresentations on its military modernization plans. Such a practice overlaps with the balance of power thinking in Brazil's security policy practices, and aims to mitigate suspicions and misrepresentations of its military modernization to its neighbors. In this manner, Brazil denied that the modernization of its Armed Forces was related to concerns about the balance of power in the region, and at the same time utilized these CBMs to proceed with military modernization plans.

The first CBM used by Brazil included military exchanges with Andean neighboring countries. From 2005 onward, joint operations and air exercises, such as COLBRA (Colombia/Brazil), VENBRA (Venezuela/Brazil), and PERBRA (Peru/Brazil), improved the knowledge and confidence between the Air Forces of the Andean countries and Brazil, and helped to standardize procedures between the Andean and Brazilian militaries (Military Power Review 2005/2006). In 2013, Brazil hosted an aeronautics exercise initiative, the Cruzeiro do Sul (CRUZEX), with countries like Chile, Uruguay and Venezuela. Furthermore, in 2014, Brazil participated in the 'Operation Guarani,' – a military exercise of Brazil and Argentina – which aimed at the development of institutional cooperation, and the instillment of "friendship between land forces of the two countries" (Defesanet 2014). Such military and aeronautic exercises and joint air tasks, COLBRA, VENBRA GUARANI (Argentina / Brazil), PERBRA (Peru / Brazil) and CRUZEX remained unchanged at least until the 2014 (Military Power Review 2014). At the beginning of 2016, Brazil and Paraguay scheduled joint military exercises for 2021 (Polanski 2016). Such institutionalized military cooperation and exercises aimed at bringing more transparency to Brazil's military modernization and, therefore, mitigate any security dilemma among neighbors in the region.

The second CBM involved the launch of the National Defense White Book during the first Rousseff administration (2012), which effectively tried to offset the suspicions about practices of the balance of power implicated in its military build-up (Brasil 2012)². Rather than identifying concrete threats and enemies, the White Book outlines Brazil's new priorities in the 21st century, and conceptualizes them in terms of capabilities. It examines the challenges in key strategic areas such as space, cybernetics, nuclear energy, and the defense of the Amazon region and offshore oil fields in the South Atlantic. Furthermore, the White Book explicitly supports Brazil's aspiration for great power status and argues that, despite being located in a peaceful region, the country has to be prepared to defend itself against potential conflicts (IISS 2013, 425).

2 The objective of a White Book is to make known to society and neighboring countries, in a transparent manner, the position of a country on national defense issues as well as the country's position on strategic issues, budget, institutional and detailed material about the military. Brazil was the last country in South America to produce a White Book on national defense. Nowadays, only Colombia and Venezuela do not have a White Book in South America.

The very existence of a White Book is a crucial element in a confidence building strategy clearly aligned with security community thinking. The projection of Brazil within the concert of nations and its participation in international decision-making is the main non-conflict-driven objective of Brazilian foreign and defense policy. For a long time, Brazil portrayed itself as the dynamic ‘country of the future’, but this rhetoric was not taken seriously by other major players. Only recently, in the face of Brazil’s economic success and more assertive diplomacy, the country is perceived as an emerging country in the rapidly transforming international order (Flemes 2010). The White Book also contributes to strengthening Brazil as a country with soft power capabilities, and not as a geopolitically expansionist power toward its South American neighbors. Brazil’s practices in line with the theoretical framework of overlapping security orders show, on the one hand, its aims to produce military doctrines beyond the traditional emphasis of inter-state war. At the same time it rests firmly with military modernization, acquisition, and development plans. This overlap is what produces both causes of concern and exclusivity in scholarship. As Teixeira puts it,

The Brazilian intentions even being declared in the recent White Book on National Defense have not been fully accepted by other countries, and if it really materializes Brazilian rearmament plan, [it] should not be [accepted]. The capacity of military power pursued by Brazil should be viewed with suspicion by neighbors in the future, and it will affect the South American system ... if there is not [an] expansion of military capabilities of the neighbors as well (Teixeira 2013).

Finally, another CBM through which Brazil tried to offset suspicions about its practices of balance of power involves the joint participation of South American countries (Argentina, Brazil, Chile, Peru, and Paraguay) in United Nations Peacekeeping Operations (UNPKO) in Haiti (from 2004 until now). Clearly, UNPKOs reinforces security community mechanism in the region, however, Brazil takes advantage of the hybrid security governance offered by UNPKOs by increasing its military investment within multilateral security governance, and, thus, is prepared to manage eventualities in the anarchic international system. The use of the military for extra-territorial tasks such as the participation in peace-keeping or peace enforcement operations is a typical manifestation of this orientation since it often functions as a catalyst for greater international exposure for countries with externally-oriented doctrines, and as an opportunity for smaller states to project themselves on a global stage (Kenkel 2010; Sotomayor 2010). Brazil has sought to expand its global presence by participating in UN peace operations. During the Cardoso administration (1994–2002), Brazil joined the UN peace missions in East Timor and Angola. The fact that Brazil took a leading role in the UN Stabilization Mission in Haiti (MINUSTAH) is particularly significant, considering that Brazil refused to send troops to Haiti in the early 1990s. On the other hand, the institutionalized cooperation that arose from the exchanges between Brazilian soldiers and South American soldiers boosts positive interactions and perceptions, and spreads the community “out” through explicit or

implicit practices of learning or socialization³, as addressed by Adler and Greve (2009). Therefore, the hybrid system is a “two-level game”, particularly for rising powers that have reasons to ensure its entry into the high-table of managing international order.

Balance of Power and Security Community in Multilateral Institutions

The second important area where the overlap between the balance of power mechanisms and practices of security community overlaps in Brazil’s security governance system lies in its engagement with multilateral institutions. During the Lula administration (2002–2010), Brazil’s foreign policy changed significantly towards a proactive role in its own neighborhood and beyond, based on two goals: regional integration and multilateralism (Lima and Hirst 2006). However, this multilateral engagement is a hybrid orientation (security community with balance of power mechanisms) related to security and defense policy in the South American Union of Nations (UNASUL, in Portuguese).

With the creation of the Union of South American Nations (UNASUR, in Spanish), in 2008, Brazil promoted one of the most important mechanisms of the security community in South America since the formation of the South American Market (MERCOSUL) in 1991. While Brazil, for a long time, had regarded South America as a locus for economic exchange, Lula’s administration approached the region differently by putting an emphasis on security. Crucially, UNASUR in 2008 also aimed to equip this organization with the South American Defense Council (CDS, acronym in Portuguese). The objectives of this entity are to promote the cooperation between UNASUR members in security issues, the coordination of defense policies, the exchange of military personnel, and the joint participation in UN peace operations (Souza Neto 2013). Furthermore, the emerging South American bloc constituted a multilateral project that, for the first time, did not privilege the trade agenda among its members. Clearly, such an initiative by Brazil is emblematic of creating a security community through institutionalized cooperation. We shall see the development of the security community initiatives before looking at how it also overlaps with the balance of power mechanisms.

On the multiple goals upon which UNASUR is structured, three of them related to security issues. First, to strengthen the political dialogue between members states, aiming to achieve a coordinated space in order to reinforce South American integration and UNASUR’s participation in the international order. Second, to stimulate the coordination between South American States’ specialized agencies by respecting international norms with the objective of strengthening the fight against terrorism and corruption. And third, to exchange information and experience in defense matters (Villa and Vianna 2010).

Thus, despite the broad range of themes on UNASUR’s scope, South American integration project has dedicated a privileged space for defense and security issues. More specifically, besides

3 As an Argentine General participant in the MINUSTAH says, it “... means the first project of sub-regional combined participation in a mission of peace (...) We cannot say that there is an integrated force, but there is a strong bond and interconnection at the level of the General Staff, as well as among the battalions that stay there” (Hang 2006).

the four-body institutional structure⁴ – approved in the final version of the bloc’s constitutive treaty – members states acknowledged and approved Brazil’s proposal to create CDS. The objective of the new institution has been to promote the cooperation between UNASUR members in security issues, the coordination on joint defense policies, the exchange of Armed Forces personnel, the joint participation on United Nations peace operations, among others matters. Therefore, the CDS does not assume a conventional military alliance between South American countries such as North Atlantic Treaty Organization (NATO). With the objective to clarify the traits that differentiated CDS from past international initiatives on security, Brazil’s Minister of Defense, Nelson Jobim, visited South American countries before the Brasilia Summit (May 2008). According to the Brazilian government, a forum specifically dedicated to defense and security matters in the region could avoid crisis such as the one which involved Colombia and Ecuador in 2008 (Villa and Vianna 2011). In this sense, the Brazilian initiative fits well with the premise of the practices and discourse on security communities, which encompasses security consultation standards and practices of multilateral decision-making among countries around security issues (Adler and Greve 2009). When a country or group of countries sponsors multilateral commitments on security and defense in a specific region, they are building, in the strongest way possible, opportunities to promote long term a security community.

In these initiatives, the balance of power mechanisms also clearly overlaps with security community practices. Particularly, the interpretation of CDS by other countries and the role of Brazil in the institution is a case in point. Despite the approval of the CDS by UNASUR members on December 2008, some South American countries skeptically viewed it as an instrument for Brazil’s power projection, which may eventually become an obstacle for consolidating the CDS. The idea was that this defense institution would certainly improve Brazilian military capability and not others (Amaral 2004, 32). The fact that CDS was advocated by former Brazilian Minister of Defense Nelson Jobim contributed to further suspicions about the possibility of the institution to reflect the Brazilian strategic project about the leadership of the subcontinent. “In many circles, the CDS is still perceived as a product of Brazil’s decision to emphasize its role in the region as part of a Brazilian strategy aimed at achieving its insertion at the international level of security” (Brigagão 2011, 20).

Another evidence of the existence of a Brazilian national agenda behind the CDS project is the “coincidence” of dates between the publication of the document that created the CDS and the presentation of the Brazilian National Defense Strategy, which deals with the restructuring of the national defense of Brazil. One of the topics of the Brazilian National Defense Strategy is entitled “[to] encourage the integration of South America.” By stressing the importance of regional military cooperation and the integration of their industrial defense bases (Viera et al. 2016, 9-10), CDS could be also be understood as a kind of platform for exporting Brazilian military armaments, particularly planes. Thus, the proposal could only reflect the strategy of “South Americanization” from Brazil, according to which the country would tend to maximize their relatives gains for expanding its relations with South America.

4 The South American bloc is composed by the Chiefs of State and Government Council (UNASUR’s main decision body); the Ministers of Foreign Affairs Council; the Delegates Council; and the General Secretariat.

Despite representing a regional demand, the document that created the CDS was rather vague because it did not establish the mode by which the defense cooperation could operate. Moreover, Colombia's resistance to some points of the document further produced distrust by other South American countries about Brazil's intentions. Clearly, the speed with which the agreement was generated, as well as the lack of clarity of the goals of the agreement, were important points of contention and reasons for mistrust (Teixera 2013). These suspicions were reinforced when Brazil, following the signing of the agreement that created the CDS, signed military cooperation agreements, between the years of 2008 and 2010, with eight South American countries (Bolivia, Chile, Colombia, Guyana, Peru, Uruguay, Suriname and Venezuela) (Teixera 2013). As Teixera puts it, "such an initiative could be interpreted as [strengthening] the Brazilian intentions to promote its foreign policy, adding support for a seat on the UN Security Council, at the same time that enables channels to facilitate the export of its defense industrial park" (Teixera 2013, 138).

Furthermore, in 2012, as part of defense cooperation plans, the CDS countries decided to undertake a collective construction of a basic training aircraft after reaching the consensus that the region operates obsolete models of aircraft. During the meeting of the CDS in Buenos Aires, in 2012, member states decided on the collective development of a training aircraft which would be carried out based on the Argentinean IA-73. Crucially, members agreed to call it UNASUR I project (Infodefense.com. 2012a). Brazil was one of the countries, together with Argentina, Chile, Colombia, Ecuador, Paraguay, Uruguay and Venezuela, which participated in the working group, and expressed interest in developing the project. A project of this nature means prioritizing the interests of regional cooperation instead of the national interest of member countries, be it political or economic. However, as Teixera notes:

In relation to Brazil, despite being one of the UNASUR proposers there is no indication that it will actively participate in the project or if Brazil has interest to acquire such airplane. This stems from frequent statements on the likely acquisition of the aircraft Tx Pilgrim manufactured by Brazilian company NOVAER, located in Santa Catarina. This aircraft has been announced as the likely replacement of the Brazil T-25 Universal, training aircraft used by the country already over 40 years (Teixera 2012; our translation).

In addition, the purchase of an aircraft to equip the Brazilian Air Force could be seen as a reversal of the country's position of selling to the buyer, signaling its intention to cooperate, and not only to sell their defense products in South America (Infodefensa.com 2012b). This ambivalent logic is observed by Leticia Pinheiros who affirmed that the desire for autonomy leads Brazilian foreign policy to exercise a double standard toward the South American region. On the one hand, given the international power asymmetries, "Brazilian diplomacy seems to be guided by the pursuit of absolute gains at the global level", and a rational strategy to that effect is the South American intra-regional cooperation. "On the other hand, at the regional level, the logic is the search for relative gains, [through] resistance to the deepening of Mercosur, the Rio Group seeking to preserve the power differential of the country" (Pinheiros 2000, 323-24).

During the IV Meeting of the CDS in 2012, in Lima, Brazil took on the responsibility of establishing the South American Defense School – a center of higher studies of the Council of South American Defense (CDS) – based on the need for taking concrete measures to outline a regional identity on security matters. The creation of the School also showed the rise of Brazilian interest in security matters, particularly after the discovery of espionage programs and tracking from the US National Security Agency (NSA), in 2013, in several South American countries, chiefly Brazil (Viera et al. 2016). After the espionage revelations regarding President Dilma Rousseff, Brazilian agencies of defense and foreign affairs recommended redoubled interest in defense issues related to cyber security. That same year, the Brazilian Minister of Defense Celso Amorim, visited Argentina and advocated greater integration of South American countries for regional protection against international espionage (Amorim 2013).

This security community initiative crucially overlaps with mistrust and balance of power thinking. During the Rousseff government, Brazil had a major concern in the institutionalization of the organizational structures of CDS, and saw the establishment of the School as an important component to regional security. In this context, it is important to emphasize that the school aims to train specialized staff in defense and regional security, as well as encourage “mutual confidence” between the members of UNASUR. Clearly, the initiative garnered support from Brazil and Argentina “after the revelations in 2013 about the spying programs and tracking of the NSA in several South American countries” (Carmo 2015). However, the Brazilian Minister of Defense Jacques Wagner appointed the Brazilian Antonio Jorge Ramalho da Rocha as the first Secretary-General of the South American Defense School – a position that can only be occupied by consensus among the members of the CDS. As part of the security dilemma, Argentina also indicated an Argentinian candidate to direct the school, thus challenging any form of consensus of Brazilian leadership (Viera et al. 2016).

Some other states also interpreted the creation of CDS under the Brazilian initiative as a balancing behavior towards Venezuela. To be sure, Venezuela took the initiatives of “deep” integration of South American armies and first proposed the creation of CDS in January 2006 to the Government of Argentina and Brazil (Silva 2012, 13). This proposal included: (1) a military integration of the 12 South American countries, similar to that of the NATO countries. The new organization should receive the name of South Atlantic Treaty Organization (OTAS); (2) a defense pact (this agreement would include sharing equipment, services, and intelligence); (3) a collective defense mechanism; (4) preparation of a South American defense and security doctrine (Medeiros 2010). However, the Venezuelan proposal to create a Council with these four characteristics was received with little enthusiasm by Brazil, which was already thinking in a more pragmatic intergovernmental institution, not tied strongly to concepts of deep integration in defense and security.

These initiatives, proposals, and ambiguities of Brazil could be comprehended if we understand the hybrid nature of Brazil’s security practices in the South American region. It is the coexistence of balance of power thinking with security community practices, which creates an aura of one-step forward two-steps backward view of the Brazilian security governance. However, it need not be

viewed that way. Brazil's security practices indicate that multilateral integration, conflict resolution, and institutional cooperation coexist with governance based on interests, raising mistrust of neighboring countries, on Brazilian practice of balance of power in the South American region. This coexistence provides vibrancy to Brazil's security practices in the region.

Brazil, hybrid security, and bilateral relations

A third arena in which Brazilian foreign policy on security and defense presents an overlap in security community and balance of power is in its bilateral relations with some South American countries. The focus of the relationship between Brazil and Argentina will be the case in point.

Constructivist arguments, such as the one provided by Andrew Hurrell, point out to the democratization processes in both Argentina and Brazil as key aspects in the emergence of a loosely ordered security community, and for the little propensity for conflict of the Southern Cone countries in the post-Cold War period (1998). Similarly, Dominguez (2007), from a liberal and institutionalist perspective, points out that the mechanism of pluralistic security community only exists in "the southern part of South America", and that the balance of power, which played a central role in 1860, ended in the 1990s, and was replaced by a pluralistic security community. Therefore, the elites of those states in the Southern Cone of South America built new interests and identities and internalized the norms thereby enabling the institutionalization of peaceful resolution of disputes (Oelsner 2009).

The process of democratization and the process of integration through Mercosul provided Argentina and Brazil with a common vision of interests and identities and, above all, made both countries realize the vulnerability and fragility of the democratization process and the importance of their joint defense. Thus, bilateral cooperation came to be a common shield against domestic threats to the democratization process. Nevertheless, these threats were greater in Argentina, where the military movement of the "painted faces" tried to break the democratic institutions in the late 1980s. Therefore, the Brazilian government realized that the maturing of democracy in its country depended on much of the consolidation of democracy in neighboring Argentina. "Believing in democracy was important to redefine the interests, identities and a shared sense of purposes" (Hurrell 1998).

Villa (2007) attributes to the institutionalization of a system of rules on disarmament and confidence-building measures between Brazil and Argentina, and the rising cycle of military cooperation in the years of democratization as critical in ensuring cooperation between the states. As a result, the set of rules for self-governance and monitoring mechanisms for reciprocal CBMs between the two countries allowed for the further stability and continuity of cooperative ventures and CBMs. The institutionalization of military cooperation agreements has included permanent exchanges between the military staffs of the two countries, and the continuity of bi-national working groups on nuclear issues, especially the continuity of Brazilian-Argentine Agency for Accounting and Control of Nuclear Materials (ABACC), which dates back to the late 1980s. The Lula and Rousseff administrations have also included the rules of mutual trust between the two countries

through the institutionalization of communication channels between the two presidents, joint participation in peace missions, and the establishment of cooperation in the triple border area (Argentina - Brazil - Paraguay) to address aspects of drug trafficking, smuggling, and terrorism (Amaral 2007). The joint actions of Brazil and Argentine include the development of the light combat vehicle (called “Gaucho”), which is in its final phase of operational evaluation in both countries before the start of production in series. The most important factor was the signing of a joint memorandum “Understanding Mechanism on Consultation and Coordination of Defense and Security” by the Brazilian and Argentine governments in April 1997. It confirmed the mutual trust between the Armed Force of both countries, and indicated that any initiative in the field of defense and security would be previously agreed between the two governments (Saint-Pierre and Winand 2006). In sum, democratization and institutionalization of rules of cooperation certainly show that Brazil and Argentina have come a long way towards alleviating distrust and embarking on a cooperative partnership of defense and security.

This form of cooperation overlaps with the balance of power and deterrence thinking in important ways. An important way to understand how Brazil embraces a hybrid discourse on regional security can be gleaned from the pattern of Brazil’s troop deployments in the country. The focus of the Armed Forces in a region of the tightly coupled security community⁵, as practiced by countries from Western Europe, for example, concentrates the Armed Forces and military equipment of the states in the central areas of a country and not at the borders. It is an important factor for generating mutual confidence among states. Clearly, the concentration of troops on the borders by a country can generate unnecessary mistrust and may be perceived as threats by the neighbors (Medeiros 2010, 127). Brazil, however, strongly concentrates its troops and military equipment on the borders, especially along the southern frontier of the country, which borders Argentina. It symbolizes more the practices of mechanisms of deterrence that is characteristic of rivalries and suspicions with Argentina than otherwise.

From 2004 onward, the Brazilian army announced the goal to transfer military armored units (through a Basic Restructuring Plan) from major urban centers to instructions centers on the peripheral borders of the country (Saint-Pierre 2009). However, the actual transfer itself was made from urban centers in the Southeast region (Rio de Janeiro and São Paulo) to destinations in the South of the country, near the border with Argentina. Further, there is a skewed concentration of armored units in South Military Command. It is estimated that the South Military Command accounts for 90% of the Brazilian armored military equipment, 100% of the self-propelled artillery, 75% artillery, 75% of engineering, and 75% of mechanized cavalry. Furthermore, the Southern Military Command concentrates 25% of the workforce of the Brazilian Army (Defesanet 2011), and all of the most modern armored tanks acquired recently by Brazil, such as *the Leopard*, which were sent to the southern border of the country, and divided between the states of Parana and Santa

5 A tightly coupled security community shows a strong tendency to cooperative commitments, a high level of military integration, coordination, internal security, and joint forms of governance and decision rules and free movement of people (Adler and Barnett 1998, 49-50).

Catarina (Villa and Weiffen 2014). Among five Brazilian Air Force units equipped with fighter jets, two are located in the state of Rio Grande do Sul (Teixera 2013), the longest border with Argentina.

The Brazilian concentration of troops and equipment on the southern border is quite different from that of Chile, the historic rival of Argentina. Both Chile and Argentina came close to a full-fledged war in December 1978. However, in contrast to Brazil, which has prioritized the concentration of its troops and equipment on the Southern border with Argentina, Chile instead concentrates its forces on the northern border with Peru and Bolivia (Teixera 2013). This has only led to a deeper cooperation of defense issues between rivals such as Argentina and Chile. Argentina has thus taken cooperative defense more assertively than Brazil in the Southern Cone. There was the announcement of the creation of joint force between Argentina and Chile – the two states signed a bilateral agreement that created Combined Peace Forces, the so-called Brigade of the Southern Cross (*Brigada Cruz del Sur* in Spanish) – in December 2005, whose training and activities will be under the responsibility of a joint military general staff. Clearly, this kind of initiative is far from happening between Brazil and Argentina. Despite the governmental discourse, Brazil still feeds suspicions from neighbors and seeks to postpone any decision on deeper defense (Mathias et al. 2008). In sum, the militarization of the southern border – in both troop deployment and Brazilian modernization – can suggest to the neighboring countries deterrent and balancing assumptions of Brazil rather than cooperative practices in defense.

Furthermore, in the bilateral area, the nuclear issue shows the overlaps of cooperation and balancing mechanisms in defense and security issues of Brazil. As pointed out above, one of the goals in Brazilian foreign policy has been to use regional cooperation to assuage Argentine doubts about Brazilian geopolitical intention. In this direction, the most senior spokespeople at Itamaraty have been reiterating the message that “the strategic partnership between Brazil and Argentina is the cornerstone of policy for South America” (Amorim 2004; Villa 2007). In 1990, during the Collor government (1990-91), the two countries signed the Guadalajara Declaration (or the Declaration on the Exclusively Pacific Use of Nuclear Energy). This declaration served as the basis for the creation of the Brazilian-Argentine Agency for Accounting and Control of Nuclear Materials (ABACC). Such agency was further cemented with the signing of a wider-reaching agreement in December 1991, the Quadripartite Agreement among Brazil, Argentina, the International Atomic Energy Agency (IAEA) and the ABACC, for the creation of a nuclear monitoring and safeguarding system. Parallel to the institutionalization of Mercosul, the Collor administration took a further significant step with the discontinuation of its nuclear arms development program and the closure of the test site at Serra do Cachimbo. These agreements laid the groundwork for the total implementation of the Tlatelolco Treaty on the control of nuclear weapons in Latin American, and for the Mendoza Accord of September 1991, which was also signed by Chile, on similar controls for chemical and biological weapons (Villa 2007).

New developments on the nuclear issues, however, challenged such cooperative mechanisms. In 2009, officials from the International Board of Security and Nuclear and Space Affairs (DIGAN) of the Ministry of Foreign Affairs of Argentina (MFA) expressed that Argentina feared the strong international

activism and ambitions of the second Lula term could lead Brazil to review their commitments in nuclear proliferation area. In a private conversation with US diplomats in December 2009, Argentine officials said that Buenos Aires had switched the “yellow lights” due to the Brazil’s approach with Mahmoud Ahmadinejad from Iran, who had visited Brazil in November of that year, and due to the fact that Brazil opened an embassy in North Korea at the same time. Moreover, a variety of former Argentine officials and academics shared some expectations that Brazil might aim to join the other BRIC countries as an equal in terms of nuclear weapons capabilities (Wikileaks 2009).

The main concern from Argentina was the old Brazilian resistance to signing the Additional Protocol (AP) to the Nuclear Non-Proliferation Treaty. A senior Argentine official expressed concerns to officials at the US Embassy in Buenos Aires, that although ABACC and the IAEA had access to civilian and military facilities where nuclear materials were in use, they did not enjoy the broader and short-notice access envisioned under the AP. Under current arrangements, “Brazil shielded certain nuclear technology, such as centrifuges, from Argentine inspectors, while taking elaborate measures to demonstrate that nuclear fuel and materials were fully accounted for in the process” (Wikileaks 2009). Although they also stressed that while Brazil continued to accept the safeguards and commitment to transparency established by the IAEA and the ABACC, there would not be much to worry about (Wikileaks 2009), but clearly there are concerns on Brazil’s intentions.

Another issue that raises concerns from Argentina is the Brazilian project on developing a nuclear submarine, which also points to Argentinean concerns with the balance of power over the use of nuclear power in relation to its neighbor. In this light, Argentina also intends to build a nuclear submarine and in 2010, an Argentine senior official from the Ministry of Defense, in 2010, stated that “Argentina can’t stand at the edge of this technology. We never renounced to possess a nuclear submarine” (Carneiro 2012, 12; my translation). It is consistent with the idea of the Ministry of Foreign Affairs of Argentina according to which “the MFA was thinking about what steps it should take in the unlikely event that its powerful neighbor backed out of ABACC or worse developed a nuclear weapons capacity” (Wikileaks 2009). This is consistent with the concerns coming from Argentine nuclear bureaucracy about Brazilian reluctance on the diplomatic coordination of nuclear policy. As pointed out by an official from an Argentine nuclear agency:

An almost unanimous agreement among those working for the Argentine nuclear development, whether diplomats or not, is that a difficulty has been (and is) limited to coordination of diplomatic policy. This lack of coordination is generally attributed to Brazil, which does what it wants and when it wants and when they want include us or not (Gadano 2015, 29).

What these set of concerns show are that both (security community) and conflict-related (balance of power) logics reside side-by-side and in permanent contestation and, possibly, one of them prevailing over the other at some point. By foregrounding this hybrid security practices of Brazil, we also analytically see this process of overlap functions in a discourse on security. With the nuclear issues, the overlapping orders of regional security have, at times, provoked confusion and ambiguity; however, it is this overlap that also crucially provided avenues to continue the institutionalized cooperative initiatives.

Conclusion

Through a framework overlapping regional security governance, this article aimed to shed light on the situation of hybrid discourses on security and defense in Brazil with its South American neighbors. Specifically, by foregrounding the overlapping security dynamics – both balance of power and security community practices – of Brazil in the region, this article showed the empirical consequences of regional security governance. Brazil promotes a new wave of regional integration and cooperation in the field of security and defense through multilateral security initiatives – most prominently through the establishment of the South American Defense Council under the umbrella of UNASUR, which reflects patterns of a nascent security community. However, balancing behavior, deterrence, mistrust, and concerns of regional power preponderance also function in Brazil's security initiatives. With the empirical enumeration of this overlap in military modernization, multilateral institutions, and bilateral initiatives with Argentina, this article showed the important processes through which such an overlaps functions in a security discourse.

As Mani (2011) argues, the double standards in Brazil's behavior that preserves autonomy and multilateralism is not unusual in South America. Parts of the political elite may share the military's statist-nationalist strategy in line with the balance of power thinking. On the other hand, over time significant cohorts within the military might turn into proponents of an internationalist line with the security community logic. Similarly, both overlapping security process are consistent with the idea from Solingen (1998), who identified two divergent 'grand strategies' along which government leaders define their states' relationship to the regional context: an 'internationalist grand strategy' where leaders prefer economic and security cooperation, and a 'national-statist grand strategy', where actors see more benefits in military competition (Solingen 1998).

Crucially, in line with the overlapping of regional mechanisms of security governance, Brazil maintains its ambiguous and hybrid practice between rhetorical trust-building and conventional military armament. It means that non-conflict-driven initiatives still go with classical problems of the security dilemma, creating conditions for the resurgence of distrust. Yet Brazil also has the potential to offset the contradictions between the two logics, as the resulting tendency of allowing overlapping practices creates avenues for debates and discussions. Future research should investigate whether the confluence of those overlapping security dynamics is unique to Brazil or could be found in other states in the South America region.

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