NOVAFCSH
FACULDADE DE CIÊNCIAS SOCIAIS E HUMANAS
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THEORIZING SOUTH AMERICAN INTERNATIONAL SECURITY

Milton Carlos Bragatti

Tese apresentada para cumprimento dos requisitos necessários à obtenção do grau de Doutor em Relações Internacionais, realizada sob a orientação científica da Drª Carmen Fonseca e do Dr Loris Zanatta

PhD thesis in International Relations

Advisors:

Profa. Dra. Carmen Fonseca – Universidade Nova de Lisboa

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DECLARAÇÕES

Declaro que esta dissertação é o resultado da minha investigação pessoal e independente. O seu conteúdo é original e todas as fontes consultadas estão devidamente mencionadas no texto, nas notas e na bibliografia.

O candidato,

Lisboa, 24 de Setembro de 2020

Declaro que esta dissertação se encontra em condições de ser apreciada pelo júri a designar.

O orientador,

Lisboa, 24 de Setembro de 2020

Summary: What accounts for the paradoxical militarization, which occurs simultaneously to processes of cooperation in Defence in the South American region? With an analysis informed by a theoretical framework which combines the Regional Security Complex Theory (RSCT) with the English School of International Relations approach and based on systematic review methodology, this research seeks to contribute to answering this question in order to understand International Security in South America. Evidence suggests the centrality of the regional primary institutions, which both stimulate and restrain conflicts, but also effective cooperation and integration in the region, remaining a security regime.

Keywords: International security; South America; Defence; Militarization; Cooperation; Regional Security Complex Theory; English School; Geopolitics.

Riepilogo: Cosa spiega la militarizzazione paradossale, che si verifica contemporaneamente ai processi di cooperazione nella difesa nella regione sudamericana? Con un'analisi informata su un quadro teorico che combina la Teoria del Complesso di Sicurezza Regionale (RSCT) con l'approccio della Scuola Inglese di Relazioni Internazionali e basato sulla metodologia di revisione sistematica, questa ricerca ha l'obiettivo di contribuire a rispondere a questa domanda al fine di comprendere la sicurezza internazionale nel sud America. Le prove suggeriscono la centralità delle istituzioni primarie regionali, che stimolano e frenano sia i conflitti sia un'efficace cooperazione e integrazione nella regione, rimanendo un regime di sicurezza.

Parole chiave: Sicurezza internazionale; Sud America; Difesa; Militarizzazione; Cooperazione; Teoria del complesso di sicurezza regionale; Scuola inglese; Geopolitica.

Resumo: O que explica a militarização paradoxal, que ocorre simultaneamente aos processos de cooperação em Defesa na região sul-americana? Com uma análise informada em referencial teórico que combina a Teoria do Complexo de Segurança Regional (RSCT) com a abordagem da Escola Inglesa de Relações Internacionais e com base em metodologia de revisão sistemática, esta pesquisa tem o objetivo de contribuir para responder a essa pergunta, a fim de compreender a Segurança Internacional em América do Sul. Evidências sugerem a centralidade das instituições primárias regionais, que estimulam e restringem os conflitos e a cooperação e integração eficazes na região, permanecendo um regime de segurança.

Palavras-chave: Segurança internacional; América do Sul; Defesa; Militarização; Cooperação; Teoria do complexo de segurança regional; Escola Inglesa; Geopolítica.

Resumen: ¿Qué explica la paradójica militarización, que ocurre simultáneamente con los procesos de cooperación en Defensa en la región sudamericana? Con un análisis informado sobre un marco teórico que combina la Teoría del Complejo de Seguridad Regional (RSCT) con el enfoque de la Escuela Inglesa de Relaciones Internacionales y basado en una metodología de revisión sistemática, esta investigación tiene el objetivo de contribuir a responder esta pregunta para comprender la Seguridad Internacional en Sudamérica. La evidencia sugiere la centralidad de las instituciones primarias regionales, que estimulan y limitan tanto los conflictos como la cooperación e integración efectivas en la región, siendo un régimen de seguridad.

Palabras clave: Seguridad internacional; Sudamérica; Defensa; Militarización; Cooperación; Teoría del complejo de seguridad regional; Escuela Inglesa; Geopolítica.

ABBREVIATIONS

ALBA	Bolivarian Alliance for the Peoples of Our America
BRICS	Brazil, Russia, India, China, and South Africa
CAA	Conference of American Armies
CAN	Andean Community of Nations
CASA	Community of South American Nations
CEED	Centre for Strategic Defence Studies
CELAC	Community of Latin American and Caribbean States
CSBMs	Confidence and Security Building Measures
CDS	*Consejo de Defensa Suramericano,* South American Defence Council
CMDA	Conferences of Defence Ministers of the Americas
CSH	Committee on Hemispheric Security
ECLAC/ CEPAL	Economic Commission for Latin America and the Caribbean
ELN	*Ejército de Liberación Nacional*, National Liberation Army
EPP	Paraguayan People's Army
ESUDE	South American Defence School
EU	European Union
EZLN	Army of National Liberation of Emiliano Zapata
FARC	Revolutionary Armed Forces of Colombia
FMLN	Farabundo Martí National Liberation Front
FTA	Free Trade Area
FTAA	Free Trade Area of the Americas
IADB	Inter-American Defence Board
IBSA	India, Brazil, and South Africa
IMF	International Monetary Fund
IIRSA	Initiative for the Integration of the Regional South American Infrastructure
LAFTA	Latin American Free Trade Area
LSE	London School of Economics

MERCOSUR/ MERCOSUL	Southern Common Market
MIDs	Militarized Interstate Disputes
MINUSTAH	United Nations Stabilization Mission in Haiti
NAFTA	North American Free Trade Agreement
NATO	North Atlantic Treaty Organization
OAS	Organization of American States
RSCT	Regional Security Complex Theory
SICA	Central American Integration System
SISFRON	Border Monitoring System
SIVAM	Amazon Surveillance System
TIAR	Inter-American Treaty of Reciprocal Assistance
UNASUR	Union of South American Nations
UNODOC	United Nations Office on Drugs and Crime

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INTRODUCTION

The tendency for International Relations (IR) scholars about theorizing has been to think divisively, in the view of Reus-Smit & Snidal (2003): “In a field centrally concerned with territoriality, fence-building is a prized craft” (p. 12). This opening remark may serve as a reminder to all of us, IR scholars, as a call to, instead of putting up more fences, build more connections and bridges. In this sense, the pages which follow are intended to consist more of encounters and exchanges between approaches, than presenting better (or new) theories or concepts.

Mainstream International Relations (IR) theories, such as Realism and Liberalism, provide some of the most important and valuable insights and contributions to the study of international security. Still, there is a profound questioning by researchers and scholars about the divergent views on conflict and peace in South America and the conflicting (and almost paradoxical) processes that involve simultaneous efforts of cooperation to improve security between states with movements of militarization and the possibility of conflicts – and war – in the region (ADLER AND GREVE, 2009; BATTAGLINO, 2012; DUARTE-VILLA & DE SOUZA PIMENTA, 2016; VILLA, 2018; MERKE, 2011, 2014, 2015).

These scholars indicate limitations of strict adoptions of mainstream IR theories, which tend to offer conflicting views (while some scholars emphasize conflict and militarization, others view cooperative processes and peace practices in the region) and point to the need to open the scope in order to understand what accounts for this puzzle, calling for conceptual plurality, “multi-perspective” or multidisciplinary frameworks.

The purpose of this dissertation is to contribute by providing elements to answering the following research question: What accounts for the paradoxical militarization, which occurs simultaneously to processes of cooperation in Defence in the South American region? The main argument is that primary institutions of South American international society are fundamental for the understanding of militarization

and cooperation. These *regional primary institutions, we argue, both stimulate and restrain conflicts, but also cooperation*.

This dissertation adopts a framework primarily informed by the English School (ES) of International Relations with the conceptual tools of the Regional Security Complex Theory (RSCT), of the Copenhagen School, largely along the interpretation made by one of the ES leading scholars and the creator of RSCT (with Ole Waever), Barry Buzan.

The combination of the ES with the RSCT was adopted following the proposal formulated by Buzan in several works (2010; 2012). Along this holistic theoretical framework, the dissertation is inspired by what Sil & Katzenstein (2010) called *analytic eclecticism*, working *with* and *across* research traditions, and, methodologically, is based on systematic review[1] as a research design (PETTICREW & ROBERTS, 2006; DENYER & TRANFIELD, 2009),

Here, it is important to emphasize that the ES does not discard any of other mainstream approaches and does not intend to be "superior" to none of them, while in many instances incorporates elements of these theories and their contribution. In addition, the English School is, in the definition of Buzan, much more a “great conversation” where everyone is welcome (2014, p. x), from the area of Political Science and International Relations to History, Economy, Diplomacy, Law, Geography and any other. In that sense, this dissertation seeks to reaffirm the value of a “classical” approach to understand the context of international security in the region.

Despite the English School being considered, one might argue, a mainstream approach in the area of International Relations, this research tradition is still rarely used in scientific articles or doctoral theses to understand the international security in/and about the region. Therefore, this work would be located somewhere in the area

[1] A very brief definition of this methodology is provided by Denyer & Tranfield (2009): “Systematic review is a specific methodology that locates existing studies, selects and evaluates contributions, analyses and synthesizes data, and reports the evidence in such a way that allows reasonably clear conclusions to be reached about what it is and is not known. A systematic review (is…) a self-contained research project in itself that explores a clearly specified question, usually derived from a policy or practice problem, using existing studies” (p. 671).

between what some scholars might call as “filling a gap” in the literature, “theory testing” – putting the English School approach to use –, while also “theorizing”, in the sense that it discusses the potentialities of the English School in the analysis of international security in South America.

Since the issue here is militarization and cooperation in Defence in the region, the Union of South American Nations (UNASUR) features prominently, due to the fact that this was the first organization to create a Defence Council exclusively for the region (neither the US, Canada, Mexico, or other Central and Caribbean countries participated). The “rise and fall” of UNASUR, the importance of MERCOSUR (the Southern Common Market) and ALBA (Bolivarian Alliance) are also central.

However, the profusion of other organizations, treaties, arrangements, are also examined here, demonstrating the historical tension between integration versus fragmentation; the pursuit of autonomy by the nations of the region – not allowing supranational bodies or efforts to function and override their authority; the legalist tradition, the diplomacy and presidentialism (the so-called *presidencialismo de cumbre* or *diplomacia de cumbre*, where, along with the military, the figure of the President is central in the structures of power), are all discussed in the next pages.

In that sense, another “primary institution”, in the parlance of the English School, is *concertación*, which Merke (2015) aptly describes as “a loose form of (regional) international organization based on consensus-seeking and peaceful settlement of disputes. Its normative instrumental follows predictable lines, namely *uti possidetis*, non-aggression, non-intervention and international arbitration” (MERKE, 2015, p. 185).

Merke also proposes that Regionalism and intents of regional integration are primary institutions of South American international society, so we focus on these processes in a specific chapter. The importance of discussing regionalism is justified by the regionalism represented by UNASUR and the South American Defence Council (or CDS, for its acronym in Spanish).

South America is still regarded as a region with low interstate conflict concerns, but, as many scholars indicate, the issues of “intermestic” security such as threats from

non-state (organized crime) and sub-state military forces (such as paramilitaries), drug trafficking and transnational criminal gangs with ramifications throughout the region, are a local, international and global concern. According to the United Nations Office on Drugs and Crime (UNODC) statistics on homicides in 2014, Latin America is one of the most violent regions in the world. A report by the British magazine *The Economist* (2017), based on data from the Brazilian think-tank *Igarapé Institute,* indicates that 43 of the 50 most murderous cities in the world and eight of the top ten countries were in Latin America and the Caribbean.

However, state to state conflicts and tensions are still relevant, as seen in several instances, such as long-standing territorial contests and areas in dispute; sub-regional balances and instabilities; militarization and rearmament of many countries in the region; and other international issues of security and defence. These themes reveal a complex reality and scholars are producing more and better analyses in the last few years. Latin America has seen an exponential growth in articles, theses and university courses dedicated to international security about the region (BRAGATTI & PAGLIARI, 2018).

In the contemporary field of International Relations, most authors find in Realism-Neorealism the most appropriate approach to international security in the region. Central components of the Realist analysis are the balance of power, aspects such as the security dilemma and arms race, applied to the South American context. Other scholars adopt more Liberal or Constructivist approaches, focusing the analysis on issues such as institutionalized cooperation, the role of democracy, and as to whether South America constitutes a security community. The analysis of institutional overlap and security governance is an important perspective for the understanding of the contemporary regional context.

Based on the studies of Buzan and Waever (2003), several authors adopt the Regional Security Complex Theory (RSCT) as a fundamental framework for the analysis of the region's international security context. This is evidenced by the profusion of scientific articles, dissertations and theses that use this conceptualization. The RSCT has been used mostly in connection to the mainstream theories mentioned above.

Explaining and understanding conflicts, tensions, approximations, cooperation and enmities, is a challenge for the specialists and analysts in International Security dedicated to analysing and theorizing about the region. National Defence remains at the centre of the concerns of many Latin American governments, even with low probability of war between them, with military forces prepared for the possibility of imminent war.

In this work, we focus on the more traditional concept of Defence, understood here in a military and state-centred conception, such as "the study of the threat, use, and control of military force" (WALT, 1991, p. 212). The justification for this delimitation in the concept of Defence also finds resonance in the fact that most studies on Latin American are still based on the inter-state and traditional aspects of threats.

In the text *No Place for Theory - Security Studies in Latin America*, Tickner and Herz (2012), emphasize that up until the period of the Cold War, "(...) security was almost exclusively the work of generals. Both domestic and international defence policies and the concept of security itself are heavily influenced by the military approach to the subject" (p.92). The authors point to four major periods of thought on defence and international security in the region:

- *geopolitical doctrine:* from independence in the 19th century to the beginning of the bipolar conflict, the concept was based on an approach influenced by Geopolitical Theory, reflecting the construction of States and concern for borders;

- *national security doctrine:* during the height of the Cold War, the approach was based on concepts imported from the United States, which were based on the fight against "communist danger" and repression of domestic and regional leftist groups;

- *democratic security:* with the wave of democratization in the 1980s in the region, concern about the primacy of civilians in society, the role of the military and their relation to democracy;

- *broadening of the concept* with the inclusion of the interplay between domestic security and transnational threats, among others (TICKNER & HERZ, 2012).

While military governments were only concerned with securing the State, the authors emphasize that, even with democratization and the broadening of the concept of security, most studies in the region continued to reflect this tendency, in a "state-centric obsession". From the 90s and to the present, the authors indicate four main problems in the studies of Defence and Security in the region:

- *parochialism*, with no comparative studies between the region and other regions;
- *State-centrism*, where issues involving non-state actors or other threats are relegated to the background;
- *policy-knowledge* or prescriptive studies of practical utility for the State;
- *invisibility of theories* - where researchers use imported theories and reproduce them on the regional reality, and even in cases where authors explore theory and concepts, they are largely based on descriptive and prescriptive reflections (TICKNER & HERZ, 2012).

In a recent text on theoretical approaches to Latin American international security, Mearsheimer (2015) diagnoses that currently there is a tendency to focus more on method and not theory, which is a hindrance to deeper understanding. The author warns that "(…) privileging methods over theory is a wrongheaded way of advancing knowledge" (p. x). Mearsheimer stresses that "(…) creating theory and testing theory – which is what methods are ultimately all about – are both critical components of social science. Theory, however, is ultimately more important" (MEARSHEIMER, 2015, p. xi).

Historical factors are fundamental to understanding international security and Defence in Latin America. The processes of independence and formation of the nation-states have produced political tensions, territorial disputes and social divisions that persist in multiple instances, especially the borders. In addition to the Historiographical perspective, Geopolitical thinking has, to a greater or lesser extent, governed or inspired domestic and foreign policies in several countries of the region, especially in certain periods - as in military governments - making this approach an important element of analysis (RIVAROLA-PUNTIGLIANO, 2011, 2013; BRAGATTI, 2016a; 2017).

By focusing on the primary institutions of International Society, emphasizing deeper roots of the elements that restrain and/or stimulate both conflicts but also cooperation and integration in the region, the combination of the frameworks of the Regional Security Complex Theory (RSCT) with the English School is justified in the emphasis of both on historical factor, as an essential component of analysis.

In the article *The Dawn of the Historical Turn?,* Duncan Bell (2001) stresses that "IR, long dominated by American scholars, almost all self-proclaimed social-*scientists,* has for too long ignored the centrality of History in political and social explanation" (p. 116). This ahistoricism would explain why, according to him, IR scholarship is "ignored" by the other social sciences.

"The historical record offers a number of experiences and puzzles that are relevant and peculiar to the contemporary study of Latin American security", in the assessment of Kacowicz and Mares (2015), who indicate, among many issues: how sovereignty and the principle of non-intervention could provide unstable governments the opportunity to resolve internal problems; the links between economics and security; the role of democracy in Latin America's security along the fact that the region does not fit the liberal 'democratic peace' paradigm, and how military force remains a foreign policy tool (KACOWICZ & MARES, 2015, p. 17).

Major authors of the English School, such as Wight and Bull, opposed the "positivist quest", even if on rather different grounds, according to Navari (2009, p. 2). Bull defended a 'classical approach', Navari points out, arguing that "a positivist science of human affairs, in the sense of a science based on direct perception and deduction, is

inadequate in explanatory terms" (p. 2). In that sense, International Society is `"the product of both subjective and intersubjective understandings, generally excluded in the positivist agenda", according to Navari (2014, p. 206).

Unlike 'behaviour', according to Navari (2009), rules of conduct must be consciously apprehended by the subject. She adds that, as opposed to a system, which may be driven mechanistically, a society constituted by rules must be produced by rational subjects with intentions. "Accordingly, causal analysis does not have much purchase for English School scholars" (NAVARI, 2009, p. 4).

In this introduction we gave a brief summary of some of the issues that permeate the theoretical debates on international security and their reflection on the South American region. We also indicated some limitations of the mainstream theories and called attention to the potential of holistic approaches, proposing the English School as one avenue to overcome the usual dichotomies in IR.

In the first chapter, we focus on the main historical rivalries between countries in the region, presenting a summary of conflicts, the processes of independence, tensions and disputes between the South American countries.

The second chapter, while being closely connected to the first chapter, seeks to underscore some of the fundamental lines of Geopolitical thinking in and about South America, which guided or inspired foreign policies of the most important countries in the region, especially during military governments.

In the third chapter, we focus on processes and cooperative efforts of regionalism, which led to the creation and meaning of the distinct geopolitical region of South America, materialized in the institutionality of UNASUR, and the limits of the Defence Council.

The fourth chapter discusses some elements of the mainstream international security approaches in South America, namely (Neo)Realism, Liberalism, Constructivism and the Regional Security Complex Theory (RSCT). The chapter ends with some authors calling for holistic, multi-perspective approaches.

Chapter 5 presents a summary of the theoretical and methodological elements of the English School. We discuss some of the ES core concepts, such as International Society; ES and methodology; the connections, approximations and differences between ES and other mainstream theories; and the more recent turn of the ES to international regional Societies.

In chapter 6 we explore the adoption of the approach of the ES in connection to the RSCT in contemporary international security of South America, focusing on the paradoxical militarization and cooperation experienced in the context of the last few years. We conclude with some final thoughts and open avenues for further research.

Chapter 1

HISTORICAL OVERVIEW OF RIVALRIES AND CONFLICTS IN SOUTH AMERICA

INTRODUCTION

The historical processes of independence and creation of the South American nation-states are fundamental to understanding the configuration of tensions, conflicts, disputes and cooperation in the region, which influenced and were visible in institutions such as the UNASUR and the South American Defence Council (CDS). The objective of this chapter is to present a synthesis of some of these conflicts in the continent, the processes of independence, tensions and disputes between the South American countries, some of which persist until today.

The chapter opens with the Hispanic and Portuguese empires border issues and analysing the main conflicts and wars - notably, by its dimensions and historical consequences, the War of the Triple Alliance (or *Guerra do Paraguai*, in Portuguese), the War of the Chaco and the War of the Pacific. We analyse some aspects of the legal tradition of the region. The chapter concludes by looking at military cooperation in more recent times in South America.

HISTORICAL RIVALRIES

The legacy of Westphalia has implications for the study of defence and security in contemporary South America, in the view of Carlos Federico Dominguez Avila (2013). The year 1648 is a fundamental reference for the literature on international relations, with respect to the notions of sovereignty, territoriality, system of states, self-determination of the peoples, legal equality, reciprocity and non-intervention in the affairs of other States. Taken together, these notions determine much of the so-called Westphalian legacy and, though widely discussed in validity and implications by

theoreticians and bureaucrats worldwide, Avila indicates that they deserve to be better understood and explored from South American perspectives (AVILA, 2013).

Figure 1: South America divided between the Spanish and Portuguese Empires

Source: Luis Teixeira (1600), *America Austral* - Biblioteca Nazionale di Firenze (Italy).

Historians and geographers debate whether Portugal designed maps in exaggerated and deliberately erroneous ways (as well as the Spanish) for political and diplomatic use, especially during the Treaty of Tordesillas, as the thesis defended by the Portuguese geographer Cortesão (1966). Historians mention the presence of the Brazil-island already in the *Portulano Mediceo Laurenziano*, from 1351 - also referred to as

Portulano Laurenziano Gaddiano, Atlas Laurentino or *Atlas Mediceu*, commissioned by the Medici dynasty, currently in the Biblioteca Medicea Laurenziana in Florence, Italy -, which shows an island with the label of *Insula de Brazil* (KANTOR, 2007, p. 74).

In *O Corpo da Pátria*, Demétrio Magnoli proposes that the historical narrative of Brazil-colony is both geographical and territorial. The author indicates that the geographical myth of *'Ilha-Brasil'* (in a loose translation, “Brazil-island”) and the doctrine of natural boundaries were merged into the Brazilian territorial narrative. Despite the national territory being prefigured in the conception of colonial Brazil, the "natural" configuration of South America was, also, in a much deeper spectrum. This territorial narrative contributed to the formation of the Brazilian founding myth, but also served as a border policy program for the Empire of Brazil, guiding the strategies developed in both the La Plata and Amazonas basins (MAGNOLI, 1997).

The outline of a large lagoon that connected the La Plata basin with the Amazon - making Brazil an “island” - was already visible in the first geographical descriptions and maps produced from the mid-1500s, according to the historian Iris Kantor (2007), who cites the 1586 map by one of the great Portuguese cartographers, Luís Teixeira, entitled *Roteiro de todos os sinais na costa do Brasil (*Route of all the signs on the coast of Brazil) that suggests the representation of a probable encounter between the Paraguay and São Francisco rivers (on the map, this junction is effectively covered by a text - figure 2).

Figure 2: One of the first maps depicting the `Brazil-island myth`

Source: Luís Teixeira (1586), *Roteiro de todos os sinais na costa do Brasil* - Biblioteca da Ajuda, Portugal.

The myth of the island of Brazil acquires geopolitical significance both from Portuguese diplomacy and after from Brazilian imperial diplomacy in the 19th century, in the assessment of Kantor: "The myth would thus constitute a geographic

prefiguration of Independent Brazil, having been used both by the Portuguese State and by the post-colonial State, a founding myth of the Portuguese heritage" [2] (p. 76).

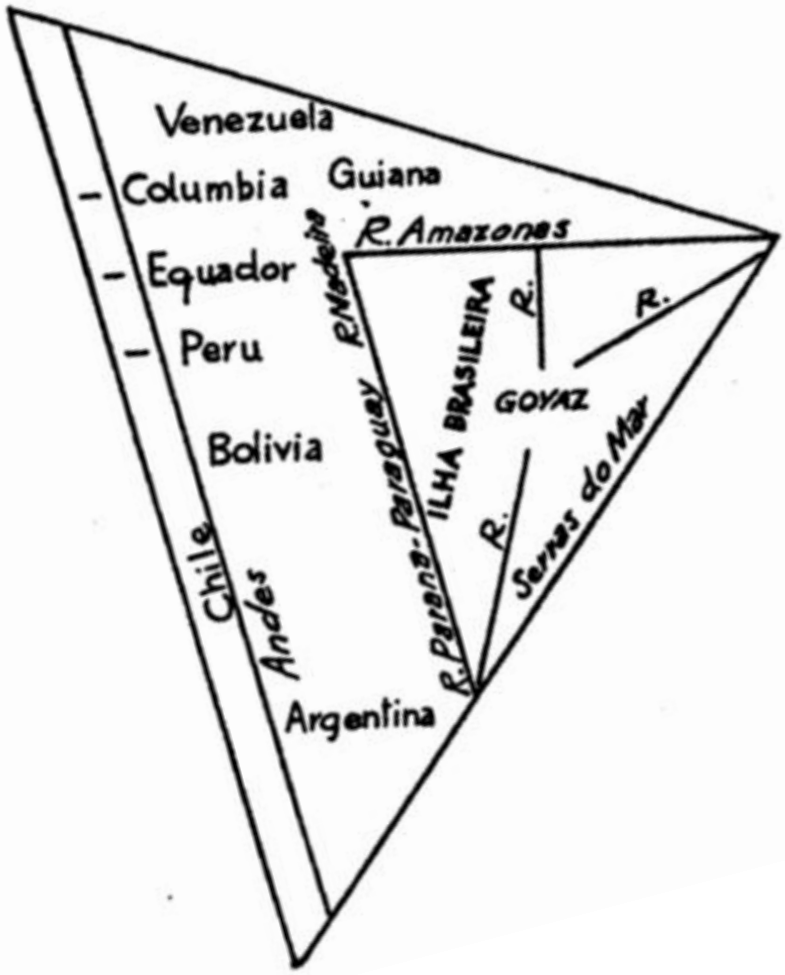
With the signing of the Treaty of Madrid (1750) and the establishment of the principle of effective possession (*uti possidetis*), Kantor emphasizes, the principle of natural border would also be the main demarcation instrument used by the Luso-Hispanic commissions. "Therefore, it is in this context that the myth of the island Brazil is mobilized, now, however, already as a geographic ideology, more than as a knowledge in which the horizons of colonization expectations were projected"[3] (KANTOR, 2007, p. 80).

One of the most prominent scholars of the Brazil-island myth was the Portuguese diplomat, historian and geopolitical thinker Jaime Batalha Reis, Portugal's plenipotentiary minister at the 1919 Peace Conference, a member of the committee that drafted the Pact of the Society of Nations. In an article published in the daily newspaper *O Comércio do Porto* on 14th of January, 1896, the historian and geopolitician presented in detail the formation and importance of this myth. A cartographic representation, on geometric lines, summarized this concept in a 1941 re-publication of the article (GARCIA, 1985).

[2] "O mito constituiria, assim, uma pré-configuração geográfica do Brasil indipendente, tendo sido aproveitado tanto pelo Estado português, quanto pelo Estado pós-colonial" (p. 76).

[3] "Portanto, é nesse contexto que o mito da ilha Brasil é mobilizado, agora, porém, já como uma ideologia geográfica, mais do que como um saber em que se projetavam os horizontes de expectativas da colonização" (p. 80).

Figure 3: South America and the `Brazil-island` in geometrical lines



Source: Reis (1941), digital reproduction by FINISTERRA Revista Portuguesa de Geografia, Universidade de Lisboa, vol. 20 n.º 40 (1985).

A century after the Westphalian agreement, the Treaty of Madrid of 1750 was signed by the Iberian powers. In this agreement, Portugal and Spain agreed to delimit a large part of the colonial borders in South America, based on dominance and effective presence in the territory (the principle of *uti possidetis*). Directly or indirectly, the legacy of Westphalia was gradually transferred to the future independent South American states still in the colonial period, as Lafer (2004) indicates. These attributes of sovereignty, non-intervention, juridical equality, self-determination and respect for treaties were confirmed and recognized by the new states throughout the nineteenth and twentieth centuries, within the framework of the independence and consolidation of the Andean, Amazonian, and Platinean states (LAFER, 2004).

During the period of consolidation of their independence, South American countries experienced wars and conflicts. Between the end of the eighteenth century and the beginning of the nineteenth century, there was a worsening of these conflicts and military confrontations. While Brazil experienced a relatively "peaceful" process of emancipation with respect to the metropolis - without fragmentation of the former Portuguese territory -, in the Hispanic territory the wars of independence caused territorial fragmentation of the former colonies, leading to the emergence of nineteen different countries at the beginning of the century: Argentina, Bolivia, Chile, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guatemala, Haiti, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, the Dominican Republic, Uruguay and Venezuela.

> “In this process of territorial division, Latin American states most often appealed to pre-independence boundaries of the Spanish Empire. Because the Spanish Crown divided its empire into ecclesiastical, administrative, and military domains with overlapping boundaries, at the time of independence the new Spanish American states had legal and historical bases to disagree over the legitimate boundaries of their countries. Even if agreement could be reached on colonial boundaries, some Latin American states appealed to the principle of *uti possidetis de jure*, while others preferred *uti possidetis de facto* (the latter quite similar to European notions of ‘effective occupation’ at the 1884 Berlin Conference as a means of regulating competition in the division of Africa)” (KACOWICZ & MARES, 2015, p. 12).

The independence processes resulted in large armed conflicts in Latin America, which involved conquering territories, consolidating the nation state, searching for strategic political dominance and / or control over strategic resources and raw materials, which coincided with the moment when the sovereignties of the newly independent states were being established. Thus, the period from 1860 to 1890 became the scene of great regional confrontations in South America, reaching its apex with the War of the Triple Alliance and the War of the Pacific.

It is important to emphasize another historic characteristic of Latin American politics: the phenomenon of *caudillismo*, which is still relevant to understand many forms of power disputes in the region and some forms of populism in many countries of the region. Zanatta (2010) explains that the *caudillo* are mostly men who, by virtue of their strength and charisma, as well as the fragility or non-existence of institutions capable of limiting their authority, gathered a vast following and seized the power with violence. Zanatta stresses that they exercised power in a traditional patrimonialist way: a booty with which to reward the followers and from which to exclude the enemies, as a private property that they ruled over the laws and the Constitutions. The *caudillo*s exercised a charismatic type of authority, still in the words of Zanatta (2010), more similar to that of religious leaders than political leaders; of leaders who are the custodians of a sacred aura capable of envisaging the salvation and protection of those who were their devotee, which found concrete advantages in recognizing the authority of a given *caudillo* and placing themselves under its protection, since there were no laws and institutions capable of guaranteeing them (ZANATTA, 2010).

The process of independence of the colonies of Spain occurred between 1810 and 1825. During this period, the various leaders, from Hidalgo in Mexico to Artigas in the Banda Oriental, exhorted the unity of the different regions that made up the Hispanic domains. Bernardo O'Higgins, San Martín and Simón Bolívar appealed to the unity, to the confraternity and to the realization of the unionist ideal, as had already been proclaimed by the different Boards of Government that were established in the viceregal capitals, since 1810 (MENESES & BRAGATTI, 2015).

In his famous Jamaica Letter of 1815, Bolívar understands that in the face of common culture and values, such as religion, language and origin, America should be ruled by a government that would confederate all the emerging states (MENESES & BRAGATTI, 2015). From the Congress of Panama until the end of the 19th century, awareness of a Latin American identity was created in contrast to the United States, which, by putting pressure on Napoleon's France and Spain, kept the areas of Louisiana and Floridas, and in the war against Mexico, the US took half of its territory, Texas; later in the war against Spain, in 1889, the US seized Cuba and Puerto Rico. All these moves allowed the United States to position itself, along England, as the hegemonic country of the continent (BOERSNER, 1997; MAGNOLI, 1997, CONNELL-SMITH, 1997; MENESES & BRAGATTI, 2015).

Regionally, the territorial limits of sovereignty between the countries of South America were constantly challenged in the nineteenth-century, according to Holsti (1996), “even though at the Congress of Lima in 1848 the governments agreed that the Spanish colonial boundaries as of 1810 should form the basis of future frontiers. This is the principle of *uti possidetis,* applied in a similar fashion in Africa since 1963” (HOLSTI, 1996, p. 153).

Latin Americanism would serve to legitimize the different strategies to preserve margin of autonomy in the region. From the Congress of Panama, other integration attempts were made until after the World War, when, on the recommendation of ECLAC, different economic blocs were built. “Integration waves”, as economist Nilson Araújo de Souza prefers to call them, which in most cases have not been successful (ARAÚJO DE SOUZA, 2012, p.87-126).

In the twentieth century, Holsti stresses that South America has seen “exceptionally high rates” of peaceful conflict resolution or toleration of conflicts (more precisely, since 1941, the date of its last war -, and the region fits into the no-war or negative Peace category, the author adds). However, most of these disputes remain unresolved, even if not likely to lead to war, in the view of Holsti (1996, p. 158):

> “South American governments have frequently - and uniquely - chosen legal means for defusing actual or potential crises. There has

> also been a history of policymakers analysing issues from a legal rather than geostrategic perspective. Claims are based on legal interpretation instead of commercial or strategic arguments. While the latter are not ignored, concepts of justice underlie much of the discourse between governments in conflict" (HOLSTI, 1996, p. 170).

In the view of Holsti, (...) "South America is almost unique in its legalistic diplomatic culture since in the region there is a tradition and sense of 'gaining honour' by meeting legal obligations", and where "legalism is the intellectual milieu in which policy is often made" (HOLSTI, 1996, p. 170, 171).

The legacy of Westphalia and the legal tradition remains a pillar in the South American region, as seen, for example, in Article 4 of the Brazilian Constitution, which states these principles: 1) national independence, 2) the prevalence of human rights, 3) self-determination of peoples, 4) non-intervention, 5) equality among states, 6) defence of peace, 7) peaceful conflict resolution, 8) repudiation of terrorism and racism, 9) cooperation between peoples for the advancement of humanity; 10) granting of political asylum (BRASIL, 1988).

Centripetal and centrifugal forces have always punctuated and continue to mark the movement of Latin American history, according to Zanatta (2010). The author emphasizes that, on the one hand, there are the strong and recurrent impulses to cooperation and integration, to political unity and spiritual communion, but on the other, equally or even stronger and recurrent, the reasons for fragmentation remain. Zanatta explains that Latin America is a historical concept, not a geographical one. The area colonized by the kingdoms of Spain and Portugal presents a principle of unity, while also cultivating a principle of plurality, or difference. The Latin-American space, according to Zanatta, "divided what history aspired to unite: its unity is multiple, in a continuous tension"[4] (ZANATTA, 2010, p. 7).

The tension between efforts and arrangements of integration and the principle of national sovereignty in Latin America is a "political conundrum", in the words of

[4] *Lo spazio divideva ciò che la storia ambiva ad unire*. L'unità e il molteplice: la tensione continua (ZANATTA, 2010, p. 7).

Almeida (2013). The author reviews the historical process to indicate that there is a contradiction between the regional integration projects in Latin America and the staunch defence by most countries of their national sovereignty.

Latin America, in the view of Almeida, has a long history in the juridical tradition of preserving national sovereignty and in the devising special mechanisms to defend and enforce it, either in the domestic sphere or through international law, which is as old as the system of mutual recognition of sovereign states established by the Peace of Westphalia of 1648 (ALMEIDA, 2013). According to the author, the dilemma is historically aggravated by a legal tradition that leads to an introverted version of the sovereignty principle, in the context of conceptual elaborations well known in international law, such as Calvo doctrine and the Drago principle (ALMEIDA, 2013).

The Calvo Doctrine was put forward by the Argentine diplomat Carlos Calvo, in 1868, suggesting that debt contracts should include a clause stating the competence of national courts to settle conflicts arising from possible claims in case of default. The goal was, as Almeida (2013) indicates, to defend the interests of the indebted governments which were facing possible judicial prosecution in creditor countries or, worse, open diplomatic intervention, which could be as harsh as armed punitive expeditions (usually by gunboats). A couple of decades later, in response to retaliatory measures adopted by some European powers against the defaulting government of Venezuela, the argentine foreign minister, Luis María Drago, proposed in 1902 a follow-up to the Calvo doctrine, proclaiming the illegality of the use of force, or armed intervention, in cases involving public debt (ALMEIDA, 2013).

Brazil, in the analysis of Almeida, tried to 'mend the fences' between the position of the United States to adopt a modified, American version, of the Drago doctrine: one of these reasons was the desire of the then Minister of Foreign Affairs, Baron *Rio Branco*, to establish a joint arrangement with the United States to rule over the entire Western hemisphere, Almeida adds, in a kind of 'unwritten alliance', establishing a fraternal relationship with the US, in a time when Argentina was the richest country in Latin America (ALMEIDA, 2013).

In the view of Kacowicz and Mares (2015), the examples of Drago and Rio Branco illustrate a Grotian assessment of international reality, emphasizing elements of diplomacy and international law in the Latin American regional international society (p. 21). The authors emphasize that Latin America as a region developed a distinctive juridical tradition of embedded principles of national sovereignty, non-intervention, and peaceful settlement of disputes among themselves, avoiding through legal mechanisms the involvement of extra regional powers.

Kacowicz and Mares emphasize that, unlike Europe, where Westphalian sovereignty was a principle to modify the relationship among these states, in Latin America the principle of non-intervention has traditionally been 'enshrined as a legal antidote' against foreign intervention. The principle of non-intervention reflects the Latin American resistance to unilateral acts of intervention by the European powers and the United States and was clearly exposed in the Calvo Doctrine of 1896 and the Drago Doctrine of 1902, according to Kacowicz & Mares. Both doctrines stressed the juridical equality of states and the inviolability of sovereignty, pointing out that foreign intervention was legally invalid (KACOWICZ & MARES, 2015, p. 19).

The 'Drago doctrine' suggested that the public debt (of an American state) is not justification for armed intervention or the actual occupation of the territory of American nations by a European power. According to Kacowicz and Mares (2015), the doctrine set an important precedent against the right of a nation to intervene to protect the lives and property of its nationals in another state, enshrining the principle of sovereignty and non-intervention, and had an everlasting effect in terms of international security and peace. These principles are seen in tradition of diplomacy in the region as Kacowicz and Mares emphasize the role of the *Barón de Rio Branco*, Brazilian foreign minister from 1902 to 1912, a practitioner and 'innovator' of international affairs "who set a world record of peaceful territorial changes in Latin America", skilfully managing to peacefully delineate the establishment of borders of the country with its 10 neighbours, drawing the Brazilian map and enlarge the country with about 342,000 square miles of territory, an area larger than France. According to Kacowicz and Mares,

> (…) “thus, in terms of international security, Brazil stood out for its skilful diplomatic performance that translated into territorial gains from all of its neighbours. Brazilian diplomacy successfully combined implicit and explicit coercive threats, like in the case of Bolivia and the Acre region, with enticing offers of nonterritorial trade-offs, such as financial and military aid, economic compensations, and freedom of navigation through the Brazilian rivers. In sum, it is difficult to find in the history of international relations a negotiating performance and an exclusively peaceful pattern similar to the Brazilian one in the establishment of its national borders” (KACOWICZ & MARES, 2015, p. 21).

WARS AND CONFLICTS IN SOUTH AMERICA

The Triple Alliance War (*Guerra do Paraguai*) was the bloodiest conflict in Latin American history, with deaths estimated between 100.000 and 600.000, where Brazil, Argentina and Uruguay united against Paraguay, ruled by Francisco Solano López, in a war the left scars in the population of the region until this day (BRAGATTI & COSTA LIMA, 2016). At the time, Paraguay was the most developed country in the region and, motivated by old territorial disputes and the need for expansion, Solano López invaded territory of neighbouring countries.

> (…) "Argentina, Brazil, and Uruguay fought a total war against Paraguay, causing the death of almost 90 per cent of the Paraguayan male population, up to 60 per cent of the total population, and requiring reparations from the vanquished people. The secret treaty among the three allies, which the British revealed at the time, stipulated that the victors would take possession of disputed parts of Paraguay and demand reparations (Brazil cancelled the remaining payments only in 1943!). Brazil enforced its maximum pre-war territorial claims; Argentina, however, went beyond that. Initially, Argentina proposed to Brazil that Paraguay be divided between them; Brazil preferred another buffer state (Uruguay being the second) between itself and Argentina. Rebuffed, Argentina sought territory north of what it disputed before the war; only Bolivia’s objection that these claims infringed on its own territorial disputes with Paraguay limited Argentina to its pre-war claims. The punishment wrought on Paraguay led Chile to

> complain to the victors that a South American country should not be treated in the way that Europeans dealt with Poland. U.S. President Rutherford B. Hayes arbitrated one of the settlements, ruling in favour of Paraguay, which honoured him by naming the province *Presidente Hayes*" (KACOWICZ & MARES, 2015, p. 13).

The war in Paraguay reveals complex geopolitical issues and the related problem of access to the region's large river network, as Zanatta (2010) indicates, resulting in the tragic defeat of Paraguay. The violent conflict lasted five years and annihilated about three-quarters of the Paraguayan population, also impeding the country's development aspirations. According to Francisco Doratioto, in *Maldita Guerra* (2002),

> (…) "the Paraguayan War was the longest and possibly the deadliest international conflict in South America. It had unprecedented characteristics, either due to the geographical conditions of the Paraguayan territory, where the fighting took place after 1866; or the use of new types of weapons and ammunition, the result of technological innovations arising from the advance of industrialization in Europe and the United States; or for the political conditions in which the war developed. In this aspect, the difficulties of relationship in the high command allied and the dictatorial character of the Paraguayan state standout, which allowed Francisco Solano López to link the destiny of the Paraguayan society to his personal trajectory. The five years of war influenced the configuration and fate of the societies that took part in it"[5] (DORATIOTO, 2002, p. 22).

According to Doratioto, the Triple Alliance War represented a milestone in the history of the four countries that have clashed with it: in Brazil, the conflict demonstrated the political and social contradictions of monarchic society, with the

[5] "(…) a Guerra do Paraguai foi o conflito internacional de maior duração e, possivelmente, o mais mortífero travado na América do Sul. Teve características inéditas, quer devido às condições geográficas do território paraguaio, onde ocorreram os combates a partir de 1866; quer pela utilização de novos tipos de arma e munição, resultado de inovações tecnológicas decorrentes do avanço da industrialização na Europa e nos Estados Unidos; quer, ainda, pelas condições políticas em que se desenvolveu a guerra. Nesse aspecto, destacam-se as dificuldades de relacionamento no alto comando aliado e o caráter ditatorial do Estado paraguaio, o que permitiu a Francisco Solano López vincular o destino da sociedade paraguaia à sua trajetória pessoal. Os cinco anos de guerra influenciaram a configuração e o destino das sociedades que a travaram" (DORATIOTO, 2002, p. 22).

consequent development of republicanism and the crisis of the slave system. It also created a strong army, which consequently deposed the monarchy with the republican coup of 15th November, 1889. It also demonstrated the isolation of the Brazilian west, resulting, in the long term, in the effort of integrating this region with the southeast of the country. As for Argentina, the conflict contributed to the centralization of the state, while Uruguay emerged with stronger institutions after the conflict. Paraguay lost territories disputed with Argentina and Brazil and watched its authoritarian and patrimonial regime end, but not accompanied by the creation of institutions which could contribute for the development of the country. Doratioto points out that one of the main consequences of the conflict was that Paraguay and Uruguay were consolidated as buffer states between Argentina and Brazil, which continued to compete in the La Plata region (DORATIOTO, 2002).

As a way of containing the conflicts and minimizing rivalries and mistrust between the states in that period, not only Paraguay became a buffer state, but also Bolivia and especially Uruguay. The independence of Uruguay was made official by the Treaty of Rio de Janeiro of 1828, under which Brazil and Argentina pledged to respect the independence of that country, which until then was a region in dispute between them.

On the other side of the continent, another major conflict was the War of the Pacific - which occurred between 1879 and 1883 - which referred especially to a dispute over the natural resources of the Atacama Desert, when Chile took the Bolivian port of Antofagasta, the only exit from the country to the sea, besides invading the Peruvian cities of Arica, Tacna and Lima. At the end of the war, Chile returned Lima and Tacna, but kept Arica and Antofagasta. The conflict continues unresolved and still causes tensions: Bolivian President Evo Morales, elected in 2006, said he would not abandon the idea of an "exit to the sea" and said that Chile has a "historic debt" to Bolivia (OPERA MUNDI, 2013), in a dispute involving regional institutions such as the OAS, UNASUR and even the International Court of Justice.

Another conflict involving Bolivia was the Chaco War - between 1932 and 1935 - against Paraguay, when the two countries faced each other in a dispute over the Chaco

Boreal region, near the Andes. The conflict ended with no winners, with the region shared between the two countries. It is estimated that the casualties have reached a hundred thousand.

The Beagle Conflict, involving Argentina and Chile, occurred more recently. In 1971, the two countries designated the British queen Elizabeth II to arbitrate for the possession of the Beagle Strait, in the region of Tierra del Fuego, the southernmost part of the continent. In 1978, the queen granted Beagle ownership to Chile, which in practice would guarantee Chile an outlet to the Atlantic Ocean. Argentina disagreed with the decision. Troops on both sides were mobilized for a war. The arbitration of Pope John Paul II prevented the outbreak of an armed conflict.

In 1995, it was Peru and Ecuador's turn to become involved in a new chapter of a territorial dispute that had been dragging on for many years. The issue was the demarcation of 78 kilometres of borders between the two countries in the *Cordillera* del *Cóndor*, with Brazil acting as a mediator between the two nations, who signed a peace agreement in 1998, involving a bid of US $ 500 million from the Inter-American Development Bank (IDB) for the development of the region.

However, if conflicts, suspicions and resentments still exist, a path for cooperation in the South American region was the process of approximation between Argentina and Brazil, still in the period of military dictatorships in the two countries in the late 1970s. Geopolitical and strategic aspects of this approximation should not be underestimated, since, as Leonel Itaussu Mello (2002) pointed out, the two countries together have an area of 11.8 million kilometres and large populations.

The confrontational climate that reached a critical point in the 1970s, with the Itaipú-Corpus controversy, gave way starting in the 1990s to a new phase of cooperation between Brazil and Argentina which, according to Mello, went from competition to distension and integration. The Malvinas-Falklands War helped to bring these two countries together, while the United States' support for the United Kingdom represented a break with the American pact, TIAR (ARAÚJO DE SOUZA, 2012).

In solving the geopolitical and strategic issues in the La Plata basin with the Itaipú-Corpus agreements, Argentina and Brazil - with Paraguay and Uruguay - undertook a process of enormous impact for the rest of South America, with the creation of MERCOSUR, in the analysis of Leonel Itaussú Mello:

> "Mercosur represents about two-thirds of the global potential - geographic, demographic and economic - of South America. This is no small thing as a starting point or take-off platform. For those who think, such as Simon Bolivar, that '[Latino] America is a nation', Mercosur was, therefore, a good start, despite nebulous vicissitudes, for the moment, in the relations between Brazil and Argentina (...) in the late 1970s , General Guglialmelli predicted that '... the Southern Cone may be a starting point for deepening Latin American unity and a nucleus of regional power against the great centres of world power'. In turn, Juan Domingo Perón, who knew the manoeuvres of politics and predicted long before that in the third millennium we would find ourselves 'united or dominated` "[6] (MELLO, 2002, p. 301).

This summary historical approach to the main South American conflicts is fundamental to understanding some aspects of the region's legalist tradition, along the disputes, distrusts and territorial and defence concerns, since rivalries, resentments and other issues have not been resolved, which might hinder cooperation efforts and regional integration.

[6] "El Mercosur representa aproximadamente dos tercios del potencial global - geográfico, demográfico y económico - de toda Sudamérica. No es poca cosa como punto de partida o plataforma de despegue. Para quien piensa como Simón Bolívar que 'la patria es América', el Mercosur fue, por el contrario, un buen comienzo, a despecho de las vicisitudes que empañan, por el momento, las relaciones brasileño-argentinas (...) En el final de la década del '70 el General Guglialmelli predijo que '(...) el Cono Sur podrá ser un punto de partida para la ulterior unidad latinoamericana y un núcleo de poder regional frente a los grandes centros de poder mundial'. A su vez, Juan Domingo Perón, que sabía de los manejos de la política, ya vaticinó mucho antes que el tercer milenio nos encontraría 'unidos o dominados' (MELLO, 2002, p. 301).

MILITARY COOPERATION IN SOUTH AMERICA

During the first half of the twentieth century the United States convened the International American Conferences, trying to stimulate free trade agreements, to create a regional security system under its hegemony and a hemispheric economy dominated by North American capital. Most attempts failed, until the outbreak of World War II, when the United States convinced several of the countries of the continent to enlist in favour of the allies, in a change that had been occurring since the government of Franklin D. Roosevelt, in the early 1930s, and its good neighbour policy (MENESES & BRAGATTI, 2015).

After the war, the United States created other mechanisms, such as the Inter-American Treaty of Reciprocal Assistance (TIAR, for its acronym in Spanish), in 1947, and the Organization of American States (OAS), in 1948. The Inter-American Treaty of Reciprocal Assistance (TIAR), essentially states that any attack by a nation outside on a country of the Americas would be an attack on all countries. According to Atílio Boron:

> "The 'external power' was a euphemism to refer to the Soviet Union. When the attack [British against Argentina] took place in 1982 during the Falklands War, Washington forgot the TIAR and placed itself on the British side, providing logistical and intelligence support that was central to victory"[7] (BORON, 2013, p. 24).

The period of the Cold War marked the greater interference by the United States in Latin America. The American predominance was particularly noticeable within the inter-American system which, in the analysis of Van Klaveren (1983), was transformed into an auxiliary organ of US foreign policy during the entire period. However, there were attempts at "insubordination": "Thus, countries such as Argentina, Brazil, Chile and

[7] "Lo de 'potencia externa' era un eufemismo para referirse a la Unión Soviética. Cuando ese ataque sobrevino, en 1982, con ocasión de la Guerra de las Malvinas, Washington se olvidó del TIAR y se puso de lado de Gran Bretaña, suministrándole apoyo logístico y de inteligencia que fueron cruciales para su victoria (BORON, 2013, p. 24).

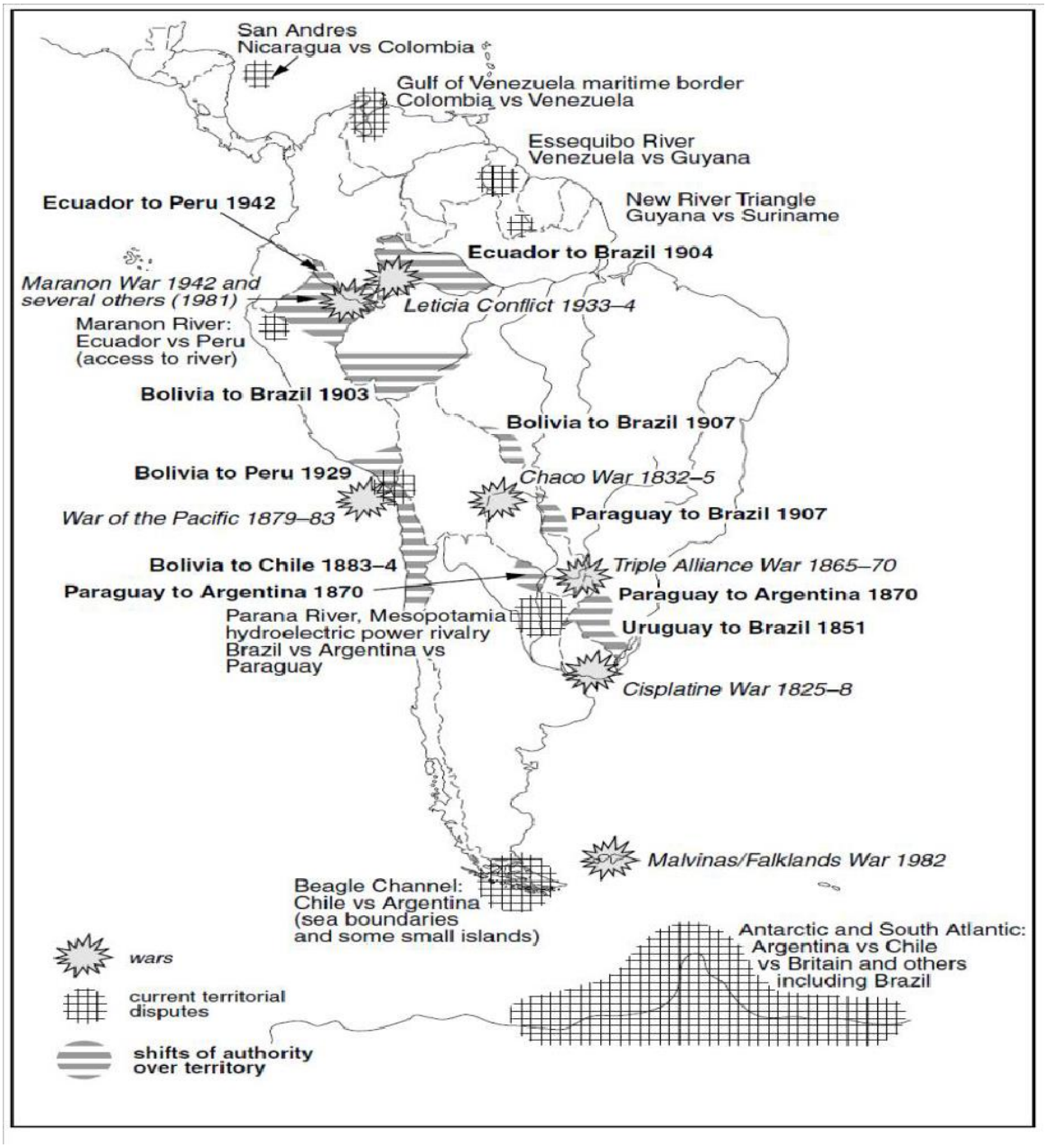
Mexico observed independent attitudes towards the United States long before they dared to speak of the decline of US hegemony" (VAN KLAVEREN, 1983, pp. 119-141).

In the 1960-1970s, "the Nixon-Kissinger administration saw in Brazil a regional ally of undoubted importance, to which the United States even had to delegate some of its responsibilities in the region", according to Van Klaveren. The Carter government defined Mexico, Brazil and Venezuela as intermediate powers within the international system and as key countries for US policy, "to the point that they were included in the group of countries that required coordinated policies at the National Security Council level in the United States" (VAN KLAVEREN, 1983, pp. 119-141).

A particularly regrettable example of coordination and cooperation among the military in South America was the so-called "Condor Plan" or "Operation Condor", which consisted of secret operations of the armed forces of South American dictatorships in various countries and supported by the CIA, to eliminate those who had ideas considered to be communist or subversive - and even to eliminate members of their families - in the 1970s and 1980s (BRAGATTI & MARTINS, 2017).

With the end of the Cold War, Hemispheric institutions were gradually questioned, such as the Inter-American Defence Board (1942), the Inter-American Treaty of Reciprocal Assistance (1947), the Inter-American Defence College (1962) and the Conference of Defence Ministers of the Americas (started in 1995). Evidence of this was the abandonment of the TIAR by Mexico, Ecuador, Bolivia, Venezuela, Nicaragua and Cuba in more recent years.

Figure 4: Wars and disputes in South America



Source: BUZAN, Barry & WAEVER, Ole. Regions and Powers: the Structure of International Security. Cambridge – UK: Cambridge University Press, 2003, p. 306.

The United States is increasingly trying to regain its influence and military strength in the region, according to Boron (2013), who argues that the US has been developing new forms of presence in the area, with intelligence, military and security agents, including sometimes not explicitly or formally, for example, hiring private security companies. Boron also notes that:

> (...) "the new types of bases (US military in South America) are actually FOLs (Forward Operating Locations). FOLs are military units that have adequate airstrips, reliable fuel supplies and supplies of all kinds, and an advanced communication system that enables the rapid movement of combat units to the most varied areas of conflict. FOLs that can act in conjunction with other more classic schemes, such as the dispatch of troops, equipment, vehicles, weapons, and whatever the circumstances demand in the local theatre of conflict. The main bases that play this role in Latin America and the Caribbean are Guantanamo in Cuba; Palmerola / Soto Cano, in Honduras; Palanquero, in Colombia; Mariscal Estigarribia, in Paraguay; and a base established by the RAF (Royal Air Force) of Great Britain in Mount Pleasant, Falklands (Malvinas), which also has personnel and equipment from the United States. This circle is completed with the shared base between British and Americans on the Ascension Islands in the equatorial Atlantic, thus total control of the South Atlantic is exerted"[8] (BORON, 2013, p. 16, 17).

A source of concern for countries such as Brazil is the militarization of Colombia, which for Brazilian historian Moniz Bandeira (2009), "with more than 1,000 American soldiers and mercenaries employed by the Pentagon's military contractors in the region and in other neighbouring countries, is a challenge for Brazil's own national security,

[8] "(...) los nuevos tipos de bases son en realidad FOLS, por su sigla en inglés (*Forward Operating Locations*). Las FOLS son unidades militares que cuentan con una adecuada pista de aviación, suministro confiable de combustible y vituallas de todo tipo, y un avanzado sistema de comunicaciones todo lo cual permite el rápido desplazamiento de las unidades de combate a los más variados frentes de conflicto. Las FOLS actúan en conjunción con otras mayores, de tipo clásico, que son las que despachan los contingentes – tropa, equipos, vehículos, armas, etcétera- requeridos por las circunstancias al escenario local del conflicto. Las principales bases que cumplen esta función en América Latina y el Caribe son Guantánamo en Cuba; Palmerola /Soto Cano en Honduras; Palanquero, en Colombia; Mariscal Estigarribia, en Paraguay; y la base establecida por la RAF (Royal Air Force) de Gran Bretaña en Mount Pleasant, Malvinas, que cuenta con numeroso personal y equipamiento de Estados Unidos. Completa este círculo la base también británica pero en condominio con los estadounidenses en las Islas Ascensión, en el Atlántico ecuatorial. Entre ambas, Mount Pleasant y Ascensión, se ejerce un total control del Atlántico sudamericano (BORON, 2013, p. 16, 17).

insofar as it threatens the security of the Amazon". According to the author, Colombia represents instability in the region:

> (...) "due to the possibility of military intervention, carried out or articulated by the United States. Plan Colombia, launched by President Bill Clinton the day before the Meeting of Presidents of South America in Brasilia, worried the Brazilian government, since it equated the conflict exclusively in its armed dimension, investing more than US $ 1.2 billion - about 80% of the US $ 1.3 billion pledged by the United States - in the purchase of war material, including airplanes, 30 Black Hawk helicopters and 33 Huey type helicopters by the Colombian Army, and only $ 238 million for the promotion of human rights and strengthening democracy and the judicial system"[9] (MONIZ BANDEIRA, 2009, p.88).

While tensions, rivalries and border disputes still influence the military planning of several South American countries, the armed forces are also used by governments in order to attain some purpose or goal that transcends the narrow field of war, according to Mares and Bernstein (1998). The movement of troops to border regions, the carrying out of military exercises, tests of new weapons, in the analysis of the authors, are also examples of the use of military means in order to "impress" or pressure other governments.

As Mares and Bernstein indicate, this policy was used 127 times in South America between the years 1884 to 1993. Latin American countries, especially those in South America, militarize matters for diplomatic purposes - rather than strict preparation for war, in the assessment of the authors. In addition, in several instances the US performs the policing function in the region, which severely limits the ability of governments in the region to use force against one another (MARES & BERNSTEIN 1998).

[9] "(...) devido, sobretudo, à possibilidade de uma intervenção militar, efetuada ou articulada pelos Estados Unidos. O Plano Colômbia, lançado pelo Presidente Bill Clinton um dia antes da Reunião dos Presidentes da América do Sul, em Brasília, preocupou o governo brasileiro, uma vez que equacionava o conflito exclusivamente em sua dimensão armada, destinando mais de US$ 1,2 bilhão – cerca de 80% dos US$ 1,3 bilhão prometidos pelos EUA - à compra de material bélico, inclusive aviões, 30 helicópteros tipo Black Hawk e 33 tipo Huey, pelo Exército colombiano, e apenas US$ 238 milhões à promoção dos direitos humanos e ao reforço da democracia e do sistema judicial" (MONIZ BANDEIRA, 2009, p.88).

However, many other initiatives demonstrate constructive military cooperation between South American states. Since the 1990s, several countries in the region have developed new mechanisms and arrangements for military cooperation. An important process is the participation of these States in the UN Peace Missions, such as the mission in Haiti (MINUSTAH), with the participation of Argentina, Brazil, Chile, Peru and Uruguay (SOUZA NETO, 2013; BRAGATTI & COSTA, 2018).

In December 2005, Argentina and Chile signed the agreement for the creation of a joint force for deployment in peace operations, with personnel from both countries responsible for the forces and operational process. According to Souza Neto (2013), the *Cruz del Sur* brigade is an example of the ability of South American countries to overcome a history of geopolitics and border disputes, leading to the introduction of a joint and combined military structure, contributing for what the author calls the "we-feeling", which contributes to the consolidation of a security community (SOUZA NETO, 2013, p. 76).

Chapter 2

GEOPOLITICAL THINKING AND FOREIGN POLICY IN SOUTH AMERICA

INTRODUCTION

Geopolitical thinking guided or influenced many nations of the region in their Foreign Policy and military planning. It also made neighbours suspect or fear neighbours, while more contemporaneously it turned into a more cooperative approach in some instances, such as the creation of UNASUR.

In this chapter we present some geopolitical elements which composed Geopolitical thinking in various moments and different nations; offer a synthesis of the development and configuration of the Inter-American geopolitical and military system during the 20th Century; the consolidation of South America as a distinct region and the CDS; present geopolitical concerns for structural and economic integration through IIRSA-COSIPLAN; and end with the creation of the South American Defence Council (CDS).

GEOPOLITICS IN SOUTH AMERICA

Geopolitical perspective - based on traditional, classical concepts of Geopolitical Theory - is one of the prisms that guided the foreign policy of several South American countries, especially Brazil and Argentina in the military periods, the largest countries in the region. This thinking is found in a number of authors of several South American countries, where concepts of Geopolitics have been reinterpreted and developed. A brief definition of Geopolitics is formulated by Oscar Medeiros Filho (2010):

> "We understand geopolitics as the field of knowledge geared towards the production of territorial policies based on the analysis

> of geographic factors. In its classical language, from a Realist and Hobbesian perspective, geopolitics is understood as an instrument of State power. Under this language, the natural (position, mineral resources, climate, etc.) and demographic (density, distribution, etc.) aspects are emphasized. More recently, geopolitics has been developed into a multidimensional approach to power, which seeks to consider new actors in relations between political units"[10] (MEDEIROS FILHO, 2010, p. 13).

The very notion of South American region is largely the product of redefinitions and reconfigurations of geopolitics in Latin America and between the region and the global hegemon, the United States, representing a break with traditional concepts such as the so-called "Western Hemisphere", "inter-American" or "Pan-American" - with institutions such as the OAS, the Monroe Doctrine[11] and the TIAR - used by Washington to exert its hegemony.

Moreover, the adoption of "South Americanism" also represents a distancing with the conception of "Latin Americanism", which goes back to ideals that have seeds from Bolivar and other ideologues of the *Patria Grande* and *Nuestra América*, for example.

In the understanding of the Brazilian geographer Rogerio Haesbaert (2010, p.7), the concept of region should not simply be understood as a 'fact' (in its actual existence) nor as a mere 'artifice' (as a theoretical or analytical resource) or as normative instrument, of action (aiming at political intervention, through planning). Instead, Haesbaert proposes that we approach

[10] Entendemos geopolítica como o campo do saber voltado para a produção de políticas territoriais a partir da análise de fatores geográficos. Na sua linguagem clássica, sob uma perspectiva realista e *hobbesiana*, a geopolítica é entendida como um instrumento de poder dos Estados. Sob essa linguagem, os aspectos naturais (posição, recursos minerais, clima etc) e demográficos (densidade, distribuição etc) recebem grande destaque. Mais recentemente, a geopolítica tem sido desenvolvida a partir de uma abordagem multidimensional de poder, que procura considerar novos atores nas relações entre unidades políticas (MEDEIROS FILHO, 2010, p. 13).

[11] According to Zanatta (2010), the Monroe Doctrine was expressed in such a way as to usher a long period of United States unilateralism, while preventing any alliances of the new American states with any European power.

> (...) "region as an 'art-fact' (always with hyphen), taken in the overlap between fact and artifice and, in a way, also as a political tool. The region seen as art-fact is conceived in the sense of breaking with the duality that many advocate between more strictly realist and idealistic attitudes, constructed at the same time of an ideal-symbolic nature (either in the sense of a theoretical construction, as an "analytical" of space, or of an identity construction from the lived space) and material-functional (in the economic-political practices with which social groups or classes construct their space in an unequal / differentiated way)"[12] (HAESBAERT, 2010, p. 7).

In the analysis of Therezinha de Castro (1995), the very geographical position and characteristics of South America give the region the category of "continent". The author proposes that by the opposition of the two oceanic slopes (Atlantic and Pacific) and by the existence of areas of repulsion, "neutral" geopolitical areas were implanted that predisposed the South American countries to an economic and psychosocial dissociation, living "with their backs to one another". The author also stresses that this South American geopolitical dualism was also influenced by the Treaty of Tordesillas (1494), which divided the continent into two main routes of continental penetration: the basin of the river Plate, given to the Spanish, offer them greater opportunities for expansion by the Pampas and Chaco; the embouchure of the Amazon granted to the Portuguese allowed them to take possession of that northern plain (CASTRO, 1995).

The topographic characteristics of the South American continent hinder regional integration, in the interpretation of Brazilian authors, such as the geographer José Fiori, who argues that

> (...) "in the case of Brazil, the topography of its territory has delayed its own demographic and economic internalization, and has biased its processes of urbanization, growth and internationalization

[12] "(...) região como um 'arte-fato' (sempre com hífen), tomada na imbricação entre fato e artifício e, de certo modo, também, enquanto ferramenta política. A região vista como arte-fato é concebida no sentido de romper com a dualidade que muitos advogam entre posturas mais estritamente realistas e idealistas, construto ao mesmo tempo de natureza ideal-simbólica (seja no sentido de uma construção teórica, enquanto representação "analítica" do espaço, seja de uma construção identitária a partir do espaço vivido) e material-funcional (nas práticas econômico-políticas com que os grupos ou classes sociais constroem seu espaço de forma desigual/diferenciada)" (HAESBAERT, 2010, p. 7).

> towards the Atlantic. The Amazonian Forest, with its low fertility lowland plains and high exploration costs, made it difficult to occupy itself, blocking Brazil's path to Venezuela, Guyana, Suriname, and the Caribbean Sea. The Pantanal and the Bolivian Chaco, with its mountains and tropical forests, limited the presence of Brazil in the territories between Guyana and Bolivia; and the Andes Cordillera, with its 8 thousand km of extension and 6,900 meters of altitude, obstructed the access of Brazil to Chile and Peru, and what is even more important, to the Pacific Ocean with all its Asian connections. This extremely difficult geography explains the existence of vast empty spaces within the Brazilian territory and its border zones, and its scarce economic relationship with its neighbours, during almost all the twentieth century, when Brazil was not even able to establish an efficient system of communication and bi-oceanic integration, as happened to the United States in the second half of the nineteenth century, after its conquest of California and Oregon, which became a decisive step in its economic development, and the projection of the global power of the States United States"[13] (FIORI, 2015).

In Brazil, it was in the 1950s that Geopolitics as a field of study gained momentum, strength and scope, with the creation of the War College *(Escola Superior de Guerra, ESG).* In addition to the initial approaches, which took place in the context of the Cold War, Brazilian Geopolitics developed and influenced projects such as the construction of Brasília and the elaboration of the concept of "Brazil Power", among others. National integration was a priority, in addition to the perspective of regional

[13] "(...) no caso do Brasil, a topografia do seu território atrasou a sua própria interiorização demográfica e econômica, e enviesou os seus processos de urbanização, crescimento e internacionalização, na direção do Atlântico. A Floresta Amazônica, com suas planícies tropicais de baixa fertilidade e alto custo de exploração, dificultou a sua própria ocupação, e bloqueou o caminho do Brasil na direção da Venezuela, Guiana, Suriname, e Mar do Caribe. O Pantanal e o Chaco boliviano, com suas montanhas e florestas tropicais limitaram a presença do Brasil nos territórios entre a Guiana e a Bolívia; e a Cordilheira dos Andes, com seus 8 mil km de extensão e 6.900 metros de altitude, obstruiu o acesso do Brasil ao Chile e ao Peru, e o que é ainda mais importante, ao Oceano Pacífico com todas as suas conexões asiáticas. Esta geografia extremamente difícil explica a existência de enormes espaços vazios dentro do território brasileiro e nas suas zonas fronteiriças, e sua escassa relação econômica com seus vizinhos, durante quase todo o século XX, quando o Brasil não conseguiu – nem mesmo - estabelecer um sistema eficiente de comunicação e integração bioceânica, como aconteceu com os Estados Unidos, já na segunda metade do século XIX, depois da sua conquista da Califórnia e do Oregon, que se transformou num passo decisivo do seu desenvolvimento econômico, e da projeção do poder global dos Estados Unidos."

integration, aiming at the protection of Brazil in relation to the Amazon region, the Midwest, and the South Atlantic and towards Africa.

Brazil's historical record from colonial times to more recent times reveals the importance for leaders to occupy "empty territories", in the view of Cetina (2011). This occupation and colonization were largely initiated by the so-called *bandeirantes*, who for years were commissioned to occupy these lands, using the principle *uti possidetis*, according to which the land belongs to who occupied it in the first place (CETINA, 2011).

As Rivarola-Puntigliano (2013) points out, several Brazilian thinkers were influenced by Geopolitics, adapting and developing geopolitical approaches to the reality of the country. The Continentalist perspective, which received contributions from other geopolitical practitioners such as Golbery do Couto e Silva and Mario Travassos, was interpreted as a way to project Brazil to the continent, consolidating the *lebensraum*[14] necessary to preserve Brazilian national autonomy (RIVAROLA-PUNTIGLIANO, 2013).

General Mario Travassos, one of the pioneers of Brazilian geopolitical thought, in his work entitled *Projeção continental do Brasil* ("The Continental Projection of Brazil"), in the 1930s proposed two strategies for Brazil to become a leader in the region: first, to pursue a policy of occupancy of the empty spaces in the vast territory, filling it by a network of roads and communications; second, to overcome the Atlantic and Pacific antagonistic conditions, separated by the Andes, and, in another sense, seek to overcome the vertical 'antagonism' between the Amazon and the Plata Basin, with the creation of a third space in the Bolivian region of Cochabamba and Santa Cruz de la Sierra (SEVERO, 2012).

Bolivia was considered by Travassos as the heartland of South America, emphasizing the strategic location of the country between the Andes, which divides the continent to the east and to the west, and the basins of the rivers Amazonas and of the

[14] One of the focuses of the work of one of the founding fathers of the discipline of Geopolitics, Friedrich Ratzel, is the search for "living space" (in the concept of *Lebensraum* formulated by Ratzel), a concern especially for (European) states that would have problems of population increase and scarcity of areas where it develops.

La Plata, which conditions a north-south division. The Bolivian territory would, thus, be a platform for projection in all directions and, at the same time, be subject to threats from all directions: "Bolivia would therefore be the only South American country to occupy simultaneously or exert projection on all these four spaces" (SEVERO, 2012, p.141).

Figure 5: Bolivia as the `heartland` of South America

Source: Revista Oikos, Volume 13, n. 1 • 2014, p. 43.

Another member of the continentalist "school of thought" was General Carlos de Meira Mattos, who thought that Brazil's destiny was of complete connection between its continental character and its alliances in the region, being the region a priority of its foreign policy. Meira Mattos emphasized the strategic importance of integrating the Amazon region into the national territory since, according to the him, it is precisely in the Amazon that the continentalization of South American hinterland would begin, emphasizing the use of transport and communication technology to promote progress and economic development of South America (CETINA, 2011).

The concern in constructing ways of communication and connection with Bolivia was reflected in Brazilian state policies. It was during the first Getúlio Vargas (1930-1945) administration that the construction of the line between Corumbá and Santa Cruz de la Sierra was started, with the aim of expanding Brazil's presence in the eastern portion of Bolivia's territory, in the analysis of Severo (2012).

In the following decades, as a result of the discoveries of natural gas, oil and minerals, among other riches, military as the Brazilian general Golbery do Couto e Silva (1955), and the Chilean dictator Augusto Pinochet (1973-1990), who extended the concept of "South American heartland" from Bolivia to include the Argentine north, Paraguay and the centre-west of Brazil, regions that have come to be considered strategic for the process of South American integration (SEVERO, 2012).

General Couto e Silva also argued that Brazil should take effective control of its own territory in order to seek a continental projection. To achieve this goal, the country should seek national integration with the effective use of territory; expansion into the interior of the country with outward projection to the Pacific; collaboration with the South American countries and with the developing world; in addition to a geostrategy that would seek to position Brazil in relation to the two great superpowers of the Cold War (COUTO E SILVA, 1955).

In Argentina, according to Rivarola-Puntigliano (2013), one of the leaders who would have been influenced by Geopolitical theorists such as Badía Malagrida was Colonel Juan Domingo Perón (1895-1974), who graduated in 1913 from military school, where he would have learned geopolitics. According to the author, like other South

American military, Argentines were trained by German instructors in the early twentieth century, absorbing German ideas about the links between state, nation and geography. Perón was the first, still according to Rivarola-Puntigliano, to lay the groundwork for geopolitics of South American integration and opening the door to transforming South America into a clear geopolitical objective, since he understood this would lead to a Latin American unity (RIVAROLA-PUNTIGLIANO, 2011, 2013).

Geopolitical concerns, according to Rudzit (2013), and the perceptions of threat in South America are still largely compatible with one of the most recognized works that "mapped" conflicts in the region: *Geopolitics and Conflict in South America: Quarrels Among Neighbors* (1985), by Jack Child.

Geopolitical thinking, for Child, would deal with the impact of geography on the achievement of national goals with the use of instruments of national power, be they economic, diplomatic, intellectual, psychological or military. Rudzit mentions that, among seventeen geopolitical conflicts in Latin America, twelve were situated in South America:

- in the San Andres Islands between Nicaragua and Colombia, classified as territorial and ideological;
- in the Maranon River, between Ecuador and Peru, this being the territorial type and for resources;
- Gulf of Venezuela, between Colombia and Venezuela, this being for territory, resources and borders;
- Essequibo region, between Venezuela and Guyana, territorial and resources;
- region of the New River Triangle, between Guyana and Suriname, being this conflict for territory and partially for resources;

- the sixth conflict would be for sea ambitions and claims for all coastal countries;

- Central Andean, between Peru, Chile and Bolivia, being for territory, geopolitical and, in Bolivia's case, for resources type;

- South Andes, involving Chile and Argentina, for territory, resources, frontier, migratory and geopolitical;

- rivalry between Argentina and Brazil, being this conflict by influence, resources and geopolitics;

- Malvinas / Falkland between Argentina and United Kingdom, this conflict for territory, ideology and geopolitics;

- Atlantic South involving Brazil, Argentina, United Kingdom and others, for resources, influence and geopolitics;

- maritime claims involving all coastal countries and Bolivia, conflict for territory, resources and geopolitics; in addition to the Antarctic dispute, involving Argentina, the United Kingdom, Chile, Brazil, the United States and the then Soviet Union, signatories to the Antarctic Treaty, ecologists and others, this conflict being for territories, resources, influence and geopolitics (CHILD apud RUDZIT, 2013).

GEOPOLITICS OF NATURAL RESOURCES

The Amazonian region is an articulator between the Andean, Caribbean and Platinean regions, a nerve centre for the defence of the region's natural resources and for its current political instability and porosity to non-state threats, such as drug trafficking and paramilitary groups.

The Amazon region, in the north of Brazil, is the one with the lowest demographic density in the country. The North and Midwest of the country (which also has part of the Amazon forest) have vast areas with low population and economic development. In the case of the geopolitical orientation of Brazil, a greater concern was

(and continues to be) to occupy and populate the "empty spaces" in the North and Central West (which justified the construction of the capital Brasília, for example, the implantation of the *Calha Norte* project, and the execution of projects such as the Amazon Surveillance System (SIVAM) and the Border Monitoring System (SISFRON).

In the Amazon Region alone, Brazil is bordered by seven of the twelve South American countries, with a total of more than 12,000 km of international boundaries in this region, which presents important geographic factors that make it difficult to implement public policies, settlement and integration: it is covered by dense equatorial forest, by a fluvial web with many rivers, hot and humid climate. These characteristics hamper the establishment of infrastructure and integration in the region, making the access and execution of civil construction works difficult. The effectiveness of public policies in this region depends on fundamental cooperation among several countries, since it involves a number of issues that span various sovereignties (OLIVEIRA, 2014).

South America has an area of 17,824,637 km2. Brazil, with an area of 8,514,047 km2, occupies almost 50% of the region; the other half (or 9,310,590 km2) is distributed among eleven countries, nine of which are Hispanic (*Encyclopaedia Britannica*, 2003). Territorially, Brazil is by far the largest country in South America, with the Southern Cone's "pacification" process in the 2000s there was a redirecting of its defence policy for the protection of the north of the country. One of the concerns was the defence of the region's natural resources (BRAGATTI & TELAROLLI, 2020; BRAGATTI, 2016, 2017; FUCCILLE, BRAGATTI & LEITE, 2018).

According to Rivarola-Puntigliano (2013), Brazil's foreign policy, based on its focus on the neighbours of the Southern Cone, materialized in the formation of MERCOSUR, from the outset had a broader objective: South America. A fundamental change in the geopolitics of the region was the approximation between Brazil and Argentina (MATHIAS, GUZZI & GIANNINI, 2008). The resolution of the controversies in the region, such as the construction of Itaipu and the nuclear cooperation agreements, began a new phase of cooperation between the two countries.

With the gradual distension and approximation between Brazil and Argentina and consequent regional integration, strategic and defence concerns for Brazil have

increasingly focused on the Amazon region and the so-called northern border (MIYAMOTO, 2002). An important element for the integration between Brazil and the Andean and Amazonian countries was the Amazon Cooperation Treaty, signed in Brasilia in 1978. Eight countries are part of this initiative: Bolivia, Brazil, Colombia, Ecuador, Guyana, Peru, Suriname and Venezuela. For Amayo Zevallos (1993), these countries signed the treaty mainly for defence reasons and against attempts by central countries to "justify" the internationalization of the Amazon. The author reminds us that François Mitterrand, president of France, a central power, argued directly and clearly to justify the internationalization of the Amazon in 1989:

> "At the Environmental Conference in The Hague, he proposed the creation of a World High Authority for Environmental Affairs capable of interference, which would limit national sovereignty over goods deemed of interest to mankind to the Amazon"[15] (AMAYO, 1993, p. 129).

In the mid-2000s, the Brazilian geographer Bertha Becker also emphasized the dispute of the international powers for the stocks of the natural wealth located in the peripheral countries:

> "This, then, is the basis of the dispute. There are three great natural *Eldorados* in the contemporary world: Antarctica, which is a space divided between the great powers; the sea bottoms, very rich in minerals and vegetables, which are spaces not legally regulated; and the Amazon region, which is under the sovereignty of national states, among them Brazil"[16] (BECKER, 2005, p. 77).

As the environment has gained prominence in the field of International Relations (IR), blurring the traditional boundaries between `high` and `low politics`, there is growing understanding of how natural resources have become an essential strategic and

[15] En la Conferencia de Medio Ambiente de la Haya él propuso la creación de una Alta Autoridad Mundial para Asuntos Ambientales con capacidad de injerencia, lo que significaría limitar las soberanías nacionales con relación a bienes considerados de interés para la humanidad, como la Amazonía (AMAYO, 1993, p; 129).

[16] Esta é, pois, a base da disputa. Há três grandes eldorados naturais no mundo contemporâneo: a Antártida, que é um espaço dividido entre as grandes potências; os fundos marinhos, riquíssimos em minerais e vegetais, que são espaços não regulamentados juridicamente; e a Amazônia, região que está sob a soberania de estados nacionais, entre eles o Brasil (BECKER, 2005, p. 77).

international security issue, especially in the view of many countries in South America. This has been called the “Geopolitics of Natural Resources” (BRAGATTI & TELAROLLI, 2020; BRUCKMANN, 2011).

Economic development models, public policies, bureaucracies, local authorities, military preoccupations, cultural and societal aspirations clash, thus making the situation even more sensitive in the region (BRAGATTI & TELAROLLI, 2020). The discussion on issues such as sovereignty, natural resources, and hydro-energy, preservation of biodiversity —as well as the Amazon as a disputed area and target of international greed— are at the centre of the political debate in the contemporary Latin American context, according to scholars such as the Peruvian political scientist Mónica Bruckmann (2011).

The way of life of some indigenous and peasant communities in South America is based on cultural concepts such as *buen vivir* — or *sumak kawsay,* in Quechua (WALSH, 2008; QUIJANO, 2007; CASTRO GOMES & GROSFOGUEL, 2007). Bruckmann (20110) reminds us that this concept means a relationship of respect and harmony with nature, seeking ecologically balanced and sustainable development. These concepts were officially adopted in countries such as Bolivia and Ecuador, which could represent a contradiction of capitalist exploitation in the global production system. Bruckmann sees a confrontation between two models of development:: “(…) one based on the planning and sustainable use of natural resources, oriented to meet the needs of the majority of social actors, and another based on the violent exploitation and expropriation of these resources and social forces and the people who own them” (Bruckmann, 2011).

The territories that compose the Andes-Amazon region have become a kind of strategic rimland for the United States, in the view of the researcher María del Pilar Ostos Cetina (2011), where it intended to "control" the actions of Brazil from Colombia. The author argued that the United States strengthens in the South American region by making Colombia its rimland, since the country is an intermediary between a group of countries that converge in Central America and the Caribbean Sea and those located on the South American side:

> "In view of this reality, the geographical, historical-political and regional hegemony exercised by the United States give Colombia the status of a 'strategic encirclement' (Rimland) or line of defence to carry out different activities and manoeuvres as part of its imminent neighbourhood with Brazil, considered from this perspective of analysis as the effective heart of South America"[17] (CETINA,2011, p. 54).

One of the biggest "problems" for Brazil's integration in the South American region is the country's connection to the dynamics of the Pacific Basin, which becomes increasingly important in the global economic terms, according to Amayo Zevallos (2004). For South American integration to become a reality, in the analysis of the author, it becomes necessary for Brazil to establish strong ties with the countries with which it has frontiers and that have exit to the Pacific - that is, Colombia and Peru. The border with Colombia, according to Amayo Zevallos, was considered by Brazil as a latent source of conflict over the possibility of infiltration of traffickers and guerrillas in its territory. The border between the two countries, 1,644 km, is entirely located in the Amazon, the largest tropical rainforest on Earth; the location and extent become very difficult to control by traditional methods, by land and water (AMAYO, 2004).

Brazil is considered by many experts as the world's 'lung' and one of the world's largest source of freshwater and biodiversity, in the analysis of Cetina (2011), as well as energy-strategic resources, including oil discoveries located deep-water in the area known as pre-salt, on the coast of São Paulo and Rio de Janeiro, which besides making the country one of the main global economies, in the view of the author, also put the country 'in the sights of the United States'. For the author, Colombia was at the centre of the control plans envisaged by Washington, which placed Brazil as the centre of the South American continent. According to the author, from Colombia, other American

[17] "Frente a esta realidad, las circunstancias geográficas, histórico-políticas y de la hegemonía regional encabezada por Estados Unidos, le otorgan a Colombia la condición de "cerco estratégico" (*rimland*) o de línea de defensa para llevar a cabo diferentes actividades y maniobras como parte de su inminente vecindad con Brasil, considerado desde esta perspectiva de análisis en el actual *heartland* sudamericano" (CETINA, 2011, p. 54).

interests can be defended, for example, in neighbouring Venezuela, whose importance lies in its power concentrated from oil (CETINA, 2011).

Venezuela gained a greater geopolitical projection with the rise of Hugo Chavez and its "Bolivarian" foreign policy, with a declared objective of using various means to contain the influence of Washington in Latin America. There are great tensions between Venezuela and the neighbouring country, Colombia, involving revolutionary groups (such as the former FARC - Revolutionary Forces of Colombia - and the ELN - National Liberation army) and for the complicated performance of the Colombian government, with the support of Washington, in the repression of drug traffickers and the so-called "war against drugs" (MIRANDA GONCALVES & BRAGATTI, 2018a).

The geopolitical importance of Venezuela is high in the configuration of the South American continent, especially because of its enormous natural and energy resources. During Chavez's government the country's foreign policy reached its apex of antagonistic and "anti-imperialist" positions in face of the United States, with Petrocaribe and ALBA seeking a projection beyond South America and into Central America and the Caribbean (the area of American influence par excellence).

The articulation and integration between the Andean-Amazonian and the Southern Cone (Platinean regions) has been gradually incorporated into projects supported by initiatives, especially by IIRSA-Cosiplan, as well as bi-national and sub regional projects (highways, pipelines and other infrastructure works, for example, many of them financed by Brazilian companies and BNDES).

GEOPOLITICS AND IIRSA-COSIPLAN

A key process for the integration of South America are the projects developed under the Initiative for the Integration of Regional Infrastructure in South America - IIRSA, later incorporated by UNASUR through COSIPLAN. IIRSA has the objective of promoting the physical integration of the region, through works and projects in the

areas of transportation, logistics, communication and infrastructure, interconnecting the continent.

The backbone of IIRSA's projects consists of energy, transportation and corridor networks linking the continent's economic centres (NEVES, 2019). The objective is to encourage integration, with the construction of the necessary infrastructure to stimulate growth along these corridors (BRAGATTI, 2016b). In addition, some of the projects approved by IIRSA are strategically located in some areas of potential conflicts, with the premise that economic development may also dispel geopolitical tensions between South American countries (BURGES, 2008).

Oliveira & Marques (2015) underscore that initiatives such as the creation of MERCOSUR, IIRSA and UNASUR combined have changed the role of Brazil and had repercussions in the other countries of South America. The authors emphasized that the integration of infrastructure in South America dates from the period of independence, with the construction of the first roads and bridges between the countries of the region, in addition to the first waterways, in mainly bilateral arrangements. Between the end of the nineteenth century and the beginning of the twentieth century, the authors emphasize, transnational railways were planned with the objective of cutting the continent, integrating the South American countries, as well as canal projects that aimed to connect the main hydrographic basins, such as the Amazon to the Orinoco. After the First World War, and especially after the Second World War, the authors continue, highways and bridges that integrated the South American countries in the most urbanized frontiers started being built, mainly in the Southern Cone, south of the Brazilian borders, between the country and its neighbour Argentina. In the analysis of the authors, from the 1970s:

> "The integration of regional infrastructure started to include large works of energy generation and infrastructure for its distribution (...), when this process started, it was to be based initially on the construction of binational hydroelectric plants, such as Itaipu. In addition to energy integration, during the military regime, aimed at strengthening economic integration, agreements on integration of infrastructure were implemented by the two countries in the bilateral sphere. In the period, the efforts to integrate the road

> network were important. In this sense, in order to facilitate the transportation of cargo and thus increase bilateral trade, federal roads were paved that link the two countries" [18](OLIVEIRA & MARQUES, 2015, p. 117).

The creation of IIRSA marked an impulse for the construction of infrastructure aimed at regional integration in the multilateral framework, according to Oliveira and Marques (2015). Through COSIPLAN (South American Council of Infrastructure and Planning), created in 2009, UNASUR incorporated the IIRSA projects:

> (...) "starting in 2013, COSIPLAN had a total of 583 projects, which required a investments of US $ 157.7 billion. In addition, the 10 integration axes were expanded to 12 axes). (…) It is important to emphasize that practically all the infrastructure to interconnect the Mercosur countries necessarily passes through the border regions between these countries (Note: *Chile, Colombia, Ecuador, Peru, among others*). From a regional perspective, this means that this infrastructure will connect the major centres and economic centres to the border regions of the Southern Cone. These regions, which until the 19th century were marked by a series of conflicts and wars for the delimitation of borders, are now one of the main vectors of regional integration"[19] (OLIVEIRA & MARQUES, 2015, p.120).

INTER-AMERICANISM AND THE CREATION OF UNASUR

The Inter-American Military System was developed in the post-Second World War and reached its apex during the Cold War, led by the United States of America, along with the concept of Western Hemisphere. This system served as a barrier and

[18] A integração da infraestrutura regional passou a incluir grandes obras de infraestrutura de geração e distribuição de energia (...), quando esse processo passou a ser pautado inicialmente pela construção de usinas hidrelétricas binacionais, como Itaipu. Além da integração energética, durante o regime militar, visando o estreitamento da integração econômica, acordos referentes à integração da infraestrutura foram efetivados pelos dois países na esfera bilateral. No período, destacam-se os esforços para efetivação da integração da malha rodoviária. Nesse sentido, com o objetivo de facilitar o transporte de cargas e assim incrementar o comércio bilateral, foram pavimentadas algumas estradasfederais que ligam os dois países (OLIVEIRA & MARQUES, 2015, p. 117).

[19] (...) a partir de 2013 o COSIPLAN contava com um total de 583 projetos, que implicam uma demanda por investimentos necessários da ordem de US$ 157,7 bilhões. Além disso, os 10 eixos de integração foram ampliados para 12 eixos). (…) Sob a perspectiva regional, isso significa que essa infraestrutura irá conectar os grandes centros e polos econômicos às regiões fronteiriças do Cone Sul. Assim, essas regiões, que até o século XIX foram marcadas por uma série de conflitos e guerras pela delimitação das fronteiras, tornam-se hoje um dos principais vetores da integração regional (OLIVEIRA & MARQUES, 2015, p.120).

strategy to antagonize the Soviet Union with a perception of a common external threat (PAGLIARI, 2009; REZENDE, 2013).

The most important institutions that compose the Inter-American System are the Organization of American States (OAS), the Inter-American Treaty of Reciprocal Assistance (TIAR, for the Spanish acronym) and the Inter-American Defence Board (IADB). The inter-American system served to consolidate the American continent as a unique geopolitical area under US influence throughout the Cold War period.

The Inter-American Defence Board was created in 1942 with the objective of being a consultative and political body and serving as a formal participative space in continental defence. Rezende (2013) emphasizes that the Inter-American Defence Board is the oldest still active regional defence organization in the world, and its function is to provide the OAS and its members with "technical, advisory, and educational services on matters related to military and defence matters in the Hemisphere, in order to contribute to compliance with the OAS Charter" (IADB, 2016).

In 1947, the Inter-American Treaty of Reciprocal Assistance (TIAR) was signed, entering into force in 1948, and was the first collective security treaty to come into force after World War II which, as Rezende (2013) points out, predates NATO and the Pact of Warsaw, which were created respectively in 1949 and 1955. The TIAR is a collective defence and security pact aimed at establishing an agreement for mutual military assistance against external threats.

In 1948 the Organization of American States was created, bringing together 35 States of the American continent. The inter-American defence system developed in the 1960s with the creation of the Conference of American Armies (CAA), composed of commanders of the Armed Forces of the Americas, to discuss regional security and coordinate military intelligence, in addition to performing joint military exercises. Another institution created in 1962 as a body under the IADB was the Inter-American Defence College, which focused on the education of military personnel and civilians for the occupation of posts in the hemisphere (PAGLIARI, 2004).

In the 1990s, with the end of the Cold War and the breakup of the Soviet Union, there were changes in hemispheric structures in response to the new configuration of power and changes in perceptions and definitions of global threats. In 1994, under the auspices of the OAS, the Conferences of Defence Ministers of the Americas (CMDAs) were established with the declared objective of defending democratic principles in the region. It was during this period that the US proposed changes in perceptions of threats, including drug trafficking and organized crime as some of its main concerns.

In the post-cold war, South America underwent a process of consolidation of democracy, after a period of military dictatorships. This process started a couple of years before the fall of the wall in Europe and the crumbling of the Soviet Union. The configuration of international security and defence in the region reflects on the impact of the post-Cold War context of political redefinition and democratic reestablishment in the region and on how this new outlook reflected on the themes and concerns of International Security in Latin America.

The intersection between regional security issues and the democratic process-building in the region caused the civil-military relations to be high on the agenda, especially as this change in regimes of government produced profound changes in the dynamics of Defence among the countries of the region, added to the fact that the systemic changes that occurred in the same period - related to redistribution of power, return of security issues to the top of the international agenda and growing importance of non-state actors in regional and international security interactions - have come to question the mission par excellence of the armed forces (BRAGATTI & PAGLIARI, 2018).

Other results were the redefinition of the internal and regional security concerns, international conflicts and domestic transformations, challenging the capacity of States and institutions to deal with this new format of dynamics, especially considering that the agenda became more complex because, adding to the traditional border conflicts still existing in the region, they had to consider also conflicts with non-state actors, especially focusing on borders. ``These, to the detriment of those, have come to challenge the new democratic regimes in consolidation`` (BRAGATTI & PAGLIARI, 2018, p. 424).

The restructuring of the international system contributed, along with domestic factors in many countries, to the construction of liberal-democratic hegemony in the early 1990s, in the analysis of Dominguez (2016). The author points out that the application of this hegemonic ideology to regulate international relations in the Americas, however, resulted from explicit governmental agreement:

> (…) "No longer would the United States intervene unilaterally, except in 1994 and 2004 in Haiti. There would be collective intervention instead. In 1991 in Santiago, the members of the Organization of American States (OAS) agreed to Resolution 1080, committing OAS member states to counter attempts to overthrow democratic governments in the Americas. In December 1992, OAS member states amended the OAS Charter through the Washington Protocol to authorize, upon a vote of two-thirds of the OAS members in the General Assembly, the suspension from the OAS of any government that had seized power by force. In the language of the victorious hegemonic states following the Congress of Vienna two centuries ago, this would be a Holy Alliance to protect and promote democratic institutions and practices" (DOMINGUEZ, 2016, p. 5).

Collective action in the Americas took other forms convergent with this restructured international system: less military intervention, more collective political action, still according to Dominguez (2016). However, the United States continued to exert its influence over Latin America, either militarily and/or financially.

> "Since 2000, the only two significant projects of the U.S. government in Latin America were Plan Colombia and the Mérida Initiative. U.S. relations with Latin America were securitized, therefore, because they involved security topics and significant violence, and not much else. Other issues that typically characterize bilateral relations such as tourism, trade, investment, and other private transactions were much less salient. Securitizing U.S. security relations impaired U.S. relations with Latin America" (DOMINGUEZ, 2016, p. 24).

With the Sept. 11, 2001 attacks on the Twin Towers in New York and the Pentagon in Washington, terrorism has become a major threat in US policy. According to Rezende (2013), the countries of the American hemisphere have distinguished themselves not only in economic matters, but also in relation to governance issues related to domestic conflicts, external disputes, threats and perceived threats. According to the author, disagreements over support for US priorities in the region and the concept of multidimensional security have expanded the process of fragmentation in the South America post-Cold War, demonstrating the limits that the inter-American system began to suffer (REZENDE, 2013; CEPIK, 2005, 2010; PAGLIARI, 2009).

> "The end of the Cold War evidenced the limits of the inter-American system for attempting to create a Hemispheric alignment in the area of defence - which ends up not happening. The idea of multidimensional security contributed even more to the emptying of the dated mechanisms from the Inter-American system, progressively diminishing its legitimacy and its use"[20] (REZENDE, 2013, p. 178).

Augusto Varas, in *Post-Cold War Security interests and Perceptions of Threat in the Western Hemisphere* (1994), indicates that during the Cold War, the United States viewed Latin America as a strategic area out of Soviet reach, and it was in this period that the Inter-American Treaty of Reciprocal Assistance (TIAR) and other military agreements between the US and Latin American nations were created. With the end of the Cold War, the Special Committee on Hemispheric Security was created within the framework of the OAS in 1992, and in 1995 the Committee on Hemispheric Security (CSH) took the place of that Committee within the framework of the OAS (VARAS, 1994; RUDZIT, 2013).

Rudzit (2013) points out that the CSH held the first Conference on Confidence and Security Building Measures, which resulted in the Santiago Declaration, with eleven

[20] O fim da Guerra Fria evidenciou os limites do sistema interamericano para a tentativa de se criar um alinhamento hemisférico na área de defesa - o que acaba não acontecendo. A ideia de uma segurança multidimensional contribuiu, ainda mais, para o esvaziamento dos mecanismos datados do sistema interamericano, diminuindo, progressivamente, sua legitimidade e o seu uso (REZENDE, 2013, p. 178).

measures agreed by the member states, such as the adoption of advance notification of military exercises; exchange of information on defence policies and doctrines; meetings and activities to prevent accidents and increase safety in land, sea and air transportation; development of channels of communication between civilian and military authorities in neighbouring countries; high level meetings etc (RUDZIT, 2013).

The creation of the South American Defence Council in December 2008, according to Rudzit (2013), was considered as an example for transforming the logic of conflict into that of cooperation, however, in the assessment of the author, the main reason for the creation of the CDS, more than that of cooperation in defence, was to avoid escalation and conflict due to the presence of different types of territorial or ideological disputes involving the threat of the use of force (RUDZIT, 2013).

The creation of the regional governance structure represented by UNASUR consolidates the concept of a South American region distinct from Pan Americanism - thus excluding the United States - as well as Latin Americanism - insofar as Mexico, Central America and the Caribbean do not participate in this process. Thus, UNASUR conferred on the region an identity and an actorness capacity that the former Brazilian Foreign Minister, Celso Amorim, called the "face" of South America (AMORIM, 2010, p. 229-230; NOLTE & WEHNER, 2012). South America has become, besides a geographical concept delimited in the maps, a political and economic entity which acquires regional governance rules, negotiation spaces and arrangements and also an international actorhood role (NOLTE & WEHNER, 2012).

In geopolitical terms, the creation of UNASUR, in the interpretation of Rivarola-Puntigliano (2013), there was an important difference with respect to the past, since Brazil became the core, with a clear strategy aimed at deepening South American integration (see also FONSECA, 2017). However, the project was not only Brazilian, according to Rivarola-Puntigliano; there was also "greater convergence with other South American states and old rivalries are being replaced by greater cooperation in areas such as economy, infrastructure, energy, security or aid" (RIVAROLA-PUNTIGLIANO, 2013, p. 846).

The geopolitical focus on the composition of South America as a distinct region, in the perspective of Vinicius Modolo Teixeira (2013), contrasted with the idea of Latin America, which, by encompassing the Central American and Caribbean countries with different realities and situations in relation to their Southern neighbours, exposed the region to the greatest orbit of influence of the United States, due to its geographical proximity:

> "The South American territory is thus much more cohesive and palpable for future political and economic communities to develop than the 'territory' of a Latin America, which would cover a region of difficult delimitation, beginning with the generalized definitions that the term meets"[21] (TEIXEIRA, 2013, p. 24).

In this sense, the conformation of the concept of "South American region" can be interpreted as a long historical-political process that was embodied in UNASUR. However, the defence of sovereignty and the "national interest" was one of its characteristics.

[21] O território sul-americano se apresenta, dessa forma, muito mais coeso e palpável para as futuras comunidades políticas e econômicas se desenvolverem do que o 'território' de uma América Latina, que abarcaria uma região de difícil delimitação, a começar pelas definições generalizadas que o termo encontra (TEIXEIRA, 2013, p. 24).

Chapter 3

WHAT KIND OF REGIONALISM?

INTRODUCTION

One of the major challenges faced by researchers of regionalism and regional integration is a conceptual one: there is a wide range of definitions of region, regional integration, regionalism, regionalization and related concepts in the academic literature (DE LOMBAERDE, SÖDERBAUM, VAN LANGENHOVE & BAERT, 2010; ACHARYA, 2004, 2007; DE LOMBAERDE, 2013).

De Lombaerde, Söderbaum, Van Langenhove and Baert (2010), emphasize that regions are constructed and reconstructed through discourse and social practices. The concept of region is a 'container-concept' with multiple meanings, the authors emphasize; therefore, the definition of a region 'depends' on the type of discourse in which a geographical area is presented (and in the research problem that a researcher or research community analyses). In general, as the authors indicate, regions are referred to in three broad senses: supranational regions, sub-national regions or cross-border regions. The concept of "region" is, then, subject of debate in IR theories and, being polysemic, according to the authors, in principle all geographic areas of the world (with their social system) that are not a State can be considered a region: "Thus, regions can be defined as what they are not: they are not sovereign states'' (DE LOMBAERDE, SÖDERBAUM, VAN LANGENHOVE & BAERT, 2010, p. 736). One possibility for the comparative studies of regionalism, the authors suggest, would be the notion of 'regionhood', considering regions as non-sovereign governance systems with partial statehood properties, and macro-regions as non-sovereign governance systems between the national and global level.

"Regions are constructed more from within than from without", according to Amitav Acharya (2007), adding that "power matters, but local responses to power may matter even more in the construction of regional orders. How regions resist and/ or

socialize powers is at least as important a part of the story as how powers create and manage regions" (p. 630).

Even if regionalism is still largely presented and thought more in economic terms, Hurrell (2007), emphasizes that its comprehension is more complex:

> (...) "regionalism is an extremely complex and dynamic process founded upon not one but a series of interacting and often competing logics - logics of economic and technological transformation and societal integration; logics of power-political competition; logics of security (both interstate and societal); and logics of identity and community. Regionalism is best viewed as an unstable and indeterminate process of multiple and competing logics with no overriding teleology or single-end point, and dynamic regions are inherently unstable with little possibility of freezing the status quo" (HURRELL, 2007, p. 130).

Detlef Nolte (2013) questions whether there is a need for other concepts besides "regional integration" to analyse the evolving Latin American (especially South American) regionalism. According to the author, such a concept must capture the possibility of maintaining national sovereignty, without the need to build supranational institutions; to contemplate (but not exclusively) the formation of supranational spaces of cooperation; the aspect of "actorness" of the region in relation to extra-regional actors; the regional public provision of goods; and especially how this process is built on a "regional governance architecture", with the integration of different organizations in the region and articulation between competing regional projects (NOLTE, 2014).

In an environment of economic and power asymmetries, in addition to the influence and proximity of the United States, the processes of regionalism in Latin America are associated with efforts to secure more autonomy, while orienting national development (RIVAROLA-PUNTIGLIANO & BRICEÑO-RUIZ, 2013).

The creation of a South American area as a distinct geopolitical entity from the rest of the continent has led to the progressive development of a regional network of organizations, forums and various multilateral forums, according to Andrés Serbin

(2010), who points out that their profile was then not clearly defined, but indicated some of its characteristics:

> "Some of them refer to the reaffirmation of national sovereignty as a constitutive principle of the Latin American legal legacy, to the reluctance on the part of the South American nations for any transfer of it for the sake of some supranational legal order, and to its reaffirmation *as an inalienable principle of the State Westphalian arisen in the region with the struggles for independence in the 19th century*, along with an implicit questioning of the inter-American system"[22] (SERBIN, 2010, p. 5, 6, – emphasis on the historical aspect is mine).

UNASUR - THE UNION OF SOUTH AMERICAN NATIONS

The creation and conformation of UNASUR reflected the changes in the political mapping of the region, initially with the rise of "progressive"/or "populist" governments, and a redefinition of the models of international insertion of several countries of the region.

UNASUR, like all other processes of regionalism in Latin America, followed an intergovernmentalism model of association, in which sovereign states are the main actors in the formulation and implementation of these same processes. Unlike the model of integration of the European Union, for example, where there is a focus on institutions and organizations of a supranational nature, UNASUR states seek to maintain, above the regional vision, the national interest and the preservation of national sovereignty.

The evolution of regionalism in South America (until the disintegration of UNASUR) can be studied from two main factors in the 2000's, according to Sanahuja:

[22] Algunas de ellas remiten a la reafirmación de la soberanía nacional como principio constitutivo del legado jurídico latinoamericano, a la reticencia por parte de las naciones sudamericanas a cualquier cesión de la misma en aras de algún ordenamiento jurídico supranacional, y a su reafirmación como principio inalienable del Estado westfaliano surgido en la región con las luchas por la independencia del siglo XIX, junto con un cuestionamiento implícito al sistema interamericano (SERBIN, 2010, p. 5, 6).

first, addressing the exhaustion of the cycle of “open regionalism” that structured integration processes and international strategies in the period 1990-2005; and the emergence, in response to the former, of formulas of “post-liberal” regionalism that respond to both the political changes experienced by the region as broader processes of change of power. Still according to Sanahuja, in the 1990s, Latin America had defined a “map” of integration that remained unchanged for more than fifteen years, Sanahuja points out. The strategies of open regionalism were adopted by most countries, such as the Central American Integration System (SICA), the Andean Community of Nations (CAN) and MERCOSUR, “characterized by low external protection, establishing customs unions to improve international competitiveness” (SANAHUJA, 2014, p.77). The author indicates that these schemes sought to respond to the liberal reforms of the “Washington Consensus”, in a regional liberalization strategy that, over time, should promote the formation of competitive advantages of these regions and provide a more successful international integration of the region in the world after the Cold War. However, these regional agreements also incorporated some elements of the “new regionalism” and managed to achieve, beyond economic interests, an experience of political cooperation in the region independently and outside the Organization of American States (OAS), as a result of processes such as democratization in the Southern Cone, and the processes of peace and democratization in the Central American countries, in Sanahuja's analysis (SANAHUJA, 2014).

In the mid-2000s, regimes based on “open regionalism” showed signs of exhaustion, with economic crises that have driven Latin American countries into dramatic situations. According to Sanahuja (2014), intra-regional trade between CAN and MERCOSUR had regressed in relative terms, as a proportion of total trade, although not in absolute numbers and, added to this process, in Sanahuja's view, a “light regionalism” was formed, characterized by intergovernmentalism.

Several changes that have occurred in the region's external economic relations around the 2000s were aimed at understanding the paradigm shift in the processes of regionalism in South America, in Sanahuja's (2014) analysis, indicating also the significant differences between countries, as well as the expansion of China as an important actor in the region. The “return of politics” or “re-politicization” in that

moment was a process related to the rise to power of several leftist governments, of nationalist / neodevelopmentalist bias, with attempts to exercise greater leadership in the region by some countries, such as Venezuela and Brazil. The search for development, with emphasis on the participation of the State in the formulation and execution of this policy, and the preoccupation with other themes, not exclusively economic, are objectives of the so-called “post-liberal regionalism", as concerted action towards extra-regional actors is seen as a priority in order to provide greater international bargaining power and also for internal actions to leverage national development (SANAHUJA, 2014; LIMA, 2013; BRAGATTI & SOUZA, 2016).

South America experienced a period of relative bonanza in the first decade of the 21st century, due to the appreciation of commodities in the global market. The economies of the region had China as the main buyer of its exports of agro-industrial products, metals and hydrocarbons. This demand for natural and energetic resources by the Chinese colossus strengthened the countries’ cash position in that period and contributed to the expansion of the autonomy margin of the economies of South America, according to Menezes and Bragatti (2020). This favourable economic scenario in the region began to revert around 2012, on account of the effects of the global financial crisis that erupted from 2008 onwards and pushed down commodity prices). With few economic resources, governments have less leverage and the regional integration schemes of the region experienced more crisis and divergences (MENEZES & BRAGATTI, 2020; CERVO & LESSA, 2014; COSTA LIMA, BRAGATTI & BORGES, 2017).

The Union of South American Nations as a regional body was officially created on 23rd May, 2008, in Brasilia. Headquartered in Quito, Ecuador, UNASUR, according to its Constitutive Treaty:

> "(...) aims to build, in a participatory and consensual manner, a space for cultural, social, economic and political integration and union among its peoples, giving priority to political dialogue, social policies, education, energy, infrastructure, financing and the environment, among others, with a view to eliminating socioeconomic inequality, achieving social inclusion and citizen participation, strengthening democracy and reducing asymmetries

> within the framework of strengthening the sovereignty and independence of states"[23] (UNASUR, 2011, p 7).

However, it is important to stress that some of the first seeds for the creation of a South American geopolitical space emerged with initiatives such as the First Summit of South American Heads of State, held in Brasilia in September, 2000, with the objective of discussing regional integration, especially of energy infrastructure and transport interconnections, promoted by former President Fernando Henrique Cardoso.

One idea was to stimulate the union between MERCOSUR and the Andean Community of Nations (CAN), in order to achieve greater benefits and bargaining power in the region, still seeking an integration of America as a whole, at that time driven by the United States, with initiatives such as the FTAA, for example.

According to the Brazilian historian Moniz Bandeira (2003), the United States administration at the time saw the union of South America with concern: "The declaration of President Fernando Henrique Cardoso that MERCOSUR is more than a market, MERCOSUR is, for Brazil, a destiny, while the FTAA - Free Trade Area of the Americas - was an option" (p.150), caused malaise in US diplomacy.

Henry Kissinger warned that MERCOSUR was prone to presenting the same trends as the European Union, which sought to define a political identity of Europe not only distinct from the United States, but in manifest opposition to Washington, in his view. Albeit speaking more on trade and economic terms, Kissinger emphasized that the affirmation of this own identity, differentiated from North America, "could create a potential contest between Brazil and the United States over the future of the Southern Cone" (KISSINGER, 2001, p.104).

The organization was a result of a process of regionalism marked by the "return of politics" or "re-politicization" (DABÈNE, 2011). In 2004, a joint initiative led mainly by

[23] (...) tiene como objetivo construir, de manera participativa y consensuada, un espacio de integración y unión en lo cultural, social, económico y político entre sus pueblos, otorgando prioridad al diálogo político, las políticas sociales, la educación, la energía, la infraestructura, el financiamiento y el medio ambiente, entre otros, con miras a eliminar la desigualdad socioeconómica, lograr la inclusión social y la participación ciudadana, fortalecer la democracia y reducir las asimetrías en el marco del fortalecimiento de la soberanía e independencia de los estados" (UNASUR, 2011, p. 7).

President Luiz Inácio Lula da Silva and the President of Venezuela, Hugo Chavez, led to the founding of the Community of South American Nations (CASA, Portuguese acronym or CSN, Spanish acronym) which, four years later, in 2008, was reformulated as UNASUR - a Union of South American Nations - encompassing important initiatives in various fields, with particular emphasis on conflict and crisis resolution and initiatives in the area of Defence cooperation among neighbouring countries (BRAGATTI, 2015b, 2016).

Regarding the first steps of the process that eventually led to the creation of UNASUR, Regueiro & Barzaga indicate that:

> "From a geopolitical perspective, CASA had the peculiarity of excluding not only the developed countries of the hemisphere (USA and Canada), but also excluding Mexico, a country that in the 1990s was one of the promoters of trade agreements with other countries of the region, where the philosophy of the North American Free Trade Agreement (NAFTA) extended, and that in some other historical periods tried to play a kind of regional leadership. This makes this space, for the first time, a clearly South American proposal"[24] (REGUEIRO & BARZAGA, 2012, p. 9-10).

Based on a multilevel analysis of Foreign Policy, Carmen Fonseca (2017) emphasizes that the formulation of Brazil's foreign policy in the Lula government took place in a context marked by systemic and internal changes, concurring to the recovery of the long-time country's ambition to develop and project itself as “Brazil-power” (FONSECA, 2017, p. 55).

Within UNASUR, there were characteristic features of post-liberal regionalism, such as the development of sectoral policies at the regional level in various fields. The issue of energy and natural resources, for example, became a central issue on UNASUR's agenda in an international context of growing concern about energy security (FORTI, 2014).

[24] "Desde la perspectiva geopolítica, la CSN tuvo la peculiaridad de excluir no sólo a los países desarrollados del hemisferio (Estados Unidos y Canadá), sino también a México, quien en la década de los noventa fue uno de los promotores de acuerdos comerciales con otros países de la región en los que se extendía la filosofía del Tratado de Libre Comercio de América del Norte (TLCAN), y que de alguna manera en otros períodos históricos ha intentado disputar una suerte de liderazgo regional. Eso hace de este espacio una propuesta netamente suramericana" (REGUEIRO & BARZAGA, 2012, p. 9, 10).

In infrastructure, the Initiative for the Integration of Regional Infrastructure in South America (IIRSA) then turned to the coordination of COSIPLAN, surrounded by controversy, in the view of Sanahuja and other authors, suggested that the priority given to some projects which were functional to a process of “reprimarization” of the economy, observed throughout South America, driven by the increase in demand in Asia and the boom in commodity prices (SERBIN, 2010; SANAHUJA, 2012).

UNASUR transcended the parameters of traditional international trade agreements, with new arrangements for cooperation and complementarity. According to Maribel Aponte Garcia,

> (...) "the new strategic regionalism in Latin America and the Caribbean is characterized by three components. First, an emphasis on the strategic elements of old regionalism, especially the creation of strategic enterprises, products and industries, and commercial and industrial relations related to the role of the state as a strategic actor. Second, the concept of multi-dimensionality beyond the economic sphere and emerging common elements that especially characterize the socio-economic model of ALBA-TCP. Third, the economic policies articulated around the concept of sovereignty and the establishment of a regional action around these policies"[25] (GARCIA, 2014, p.20).

In this sense, the development of infrastructure (COSIPLAN) projects could be analysed within the scope of “strategic regionalism”, in the assessment of Maribel Aponte Garcia (2014). According to Hettne and Söderbaum (2006), development-oriented regionalism, or neo-developmental regionalism, is one that transcends the analysis and benefits of international trade. For these authors,

> (...) "development is multidimensional, depending on secondary positive impacts and links between different sectors, which in turn require broader regional approaches, through which the

[25] El nuevo regionalismo estratégico en América Latina y el Caribe está caracterizado por tres componentes. Primero, un énfasis en los elementos del viejo regionalismo estratégico, especialmente la creación de empresas estratégicas, productos y sectores, y las alianzas comerciales e industriales vinculadas al rol del estado como un actor estratégico. Segundo, el concepto de multidimensionalidad más allá del ámbito económico y los elementos comunes emergentes que caracterizan el modelo socioeconómico del Alba-TCP. tercero, las políticas económicas articuladas alrededor del concepto de soberanía y la conformación de un accionar regional alrededor de estas políticas (GARCIA, 2014, p. 20).

> negotiation of integration is linked to other forms of economic integration and other factors (investment, payments, monetary integration, harmonization) and various forms of economic cooperation in specific sectors (transport, communications). The results are multidimensionality in a variety of regional agreements by the state and by governance entities and mechanisms; and involves a rich variety of state and non-state actors, which are often brought together in informal networks and multisectoral coalitions operating at different levels" (HETTNE & SÖDERBAUM, 2006, 183).

Around the 2010's, Latin American integration processes were fragmented, at the sub regional level, especially in South America, in three axes, in Briceño's (2013) analysis: an axis of open integration, represented by the Pacific Alliance and TLC; a revisionist axis in MERCOSUR; and an anti-systemic axis, represented by ALBA. These three axes of integration models adopted very different schemes of economic integration: MERCOSUR, since the mid-2000s, expanded its agenda but maintained a model of regionalism guided by intra-bloc trade and industry; ALBA seeking a model of integration not based on trade and commercial gain, but in solidarity with complementation and cooperation, according to Briceño-Ruiz; the Pacific Alliance, guided by open regionalism, favouring initiatives of the North-South type agenda (BRICEÑO-RUIZ, 2013).

In analysing the tensions between the different, and at times antagonistic, integration models and regionalism in the South American continent, Frenkel & Comini argued that UNASUR was in transition, in 2014. In the analysis of the authors, there were two contradictory “movements” of international insertion within the organization. Since the formation of UNASUR there was, according to them, a clash between differential patterns of relations between member countries and the rest of the world, with two different alternatives: one, polygamous; and another, concentric.

The polygamous international integration model is based on a strategy that prioritizes the international market and involves simultaneous negotiations with regional, hemispheric, and global actors. On the other hand, the concentric model is based on a strategy that prioritizes regional markets. According to the authors, the countries that assume the concentric logic of international integration have reduced

bargaining power with extra-regional actors and less alternatives to impose their margin of manoeuvre (FRENKEL & COMINI, 2014).

One of the explanations for the low institutionalization of UNASUR ("low intensity", in the words of the authors), and later deceleration, in the arguments of Frenkel & Comini, were the divergences between these two opposing models, as the authors explain:

> (...) "since the origins of the bloc, two models of international insertion have been cohabiting and in constant friction: a concentric - driven by the governments of countries like Argentina, Brazil and Ecuador; and another polygamous, represented by the processes undertaken by Chile, Colombia and Peru. The pre-eminence of the first of these models during the first years of UNASUR's life was fundamental to motivate its creation and development. However, since 2011, there has been a reconfiguration of forces in the region, which has put the South American integration process in deadlock"[26] (FRENKEL & COMINI, 2014, p.58 - authors' translation)

Frenkel & Comini argue that this broad institutional consensus in the initial impetus for the creation of UNASUR, with an emphasis on the concentric model, lasted from 2008 to 2011. Then, the logic of fragmentation of the polygamous countries began to reverse the articulation in the organization; while in the concentric pattern cohesion began to present its fissures, this new cycle was characterized by the tensions between the two models of international insertion, leading to a deceleration in UNASUR.

UNASUR became a "political space" in which the South American countries of ALBA, the members of the Pacific Rim and MERCOSUR converged (CAN and the Pacific Alliance are distributed among the first of two models of international insertion),

[26] Desde los propios orígenes del bloque, han convivido en la región dos modelos de inserción internacional en constante fricción: uno de perfil concéntrico –enarbolado por los gobiernos de países como Argentina, Brasil o Ecuador– y otro de corte poligámico –representado por los casos chileno, peruano y colombiano–. La preeminencia del primero de estos modelos durante los años iniciales de vida de Unasur fue clave para motivar su creación y desarrollo. No obstante, desde 2011 se ha producido una reconfiguración de fuerzas en la región que ha impactado en el proceso de integración sudamericano y lo ha puesto actualmente en jaque (FRENKEL & COMINI, 2014, p. 58).

according to the argument of Bernal-Meza (2013). The author argued that UNASUR developed three characteristics that differentiate it from other projects and models of regionalism in the region, past and present:

- "Ideological pragmatism and commercial flexibility (in which states are accepted with the full range of policies tariffs: CAN, Mercosur, CARICOM and Chile);
- UNASUR was part of the Security and Defence agenda;
- Demonstrated a significant political capacity to resolve in the region (intra-regional) bilateral issues between countries and internal problems that threatened to escalate, such as in the resolution of various conflicts in the region as the internal crisis of Bolivia; the border dispute between Ecuador and Colombia regarding the attack against the FARC in Ecuadorian territory; clarification of the agreement between Colombia and the United States on the use of military bases in Colombia; the political conflict between Colombia and Venezuela; among others (BERNAL-MEZA, 2013).

However, Bernal-Meza emphasized the flaws of UNASUR as institutional deficiencies, the restrictive international representation attributed to the General Secretariat and the pro-tempore presidency, among others (BERNAL-MEZA, 2013).

The “low institutionalization” of UNASUR, argued Detlef Nolte (2014), adapting to an overlapping of different perspectives and “competing” institutions in the complex regional architecture of South America, could also be one of the aspects responsible for the various successes and cooperation achieved by this institution in the region (NOLTE, 2013).

In the institutionalility of UNASUR, there was an effort to give priority to a minimal consensus, in the analysis of Frenkel & Comini:

> (...) "The logic of least common denominators was also present in the flexibility and gradualness that was sought to be implemented in the integration process, to ensure that each State acquires commitments according to its own realities. The gradual nature of

> the objectives would make it possible to reach basic agreements, establishing initiatives that can be carried out in the short term that are later linked to medium or long-term objectives. In this sense, some councils designed action plans that were initially annual or biennial and later gave rise to initiatives with greater future projection" [27] (FRENKEL & COMINI, 2014, 62 - authors' translation).

The search for sovereignty and the "national interest" of the participant countries is a feature of the institutions and processes of regionalism and cooperation in South America. UNASUR, as well as other South American regionalist processes and throughout Latin America, followed an intergovernmental model of association, where sovereign states are the main actors in the formulation and implementation of these processes. States thus seek to maintain, above the regional vision, the national interest and the preservation of national sovereignty. The search for autonomy in its various forms has been constant and fundamental in the foreign policies of Latin American countries and several thinkers in the region have developed unique theoretical analyses and formulations (SIMONOFF, 2013; BRICEÑO-RUIZ & SIMONOFF, 2017). In that sense, the South American region, as a geopolitical bloc, presented great diversity and complexity.

UNASUR succeeded in mediating the crisis in the context of the attack by the Colombian Armed Forces against the Colombian guerrilla camp in Ecuador in 2008. The institution also played an important role in the management and control of subsequent political crises, the discussion on the installation and use of Colombian military bases by the US in 2008-2009; the attempted coup in Ecuador, in 2010; as well as the mediation of the crisis between the opposition and government in Venezuela in 2014, among other situations, demonstrating that UNASUR's actions represent a "differentiated international political subsystem" in the region (PEÑA, 2009). At the same time, from a functional point of view, UNASUR positioned itself as an organization that reproduced

[27] La lógica de mínimos comunes denominadores también estuvo presente en la flexibilidad y gradualidad que se buscó implementar en el proceso de integración, para asegurar que cada Estado adquiera compromisos según sus propias realidades. La gradualidad de los objetivos permitiría alcanzar acuerdos básicos, estableciendo iniciativas realizables en el corto plazo que luego se concatenaran hacia objetivos de mediano o largo plazo. En este sentido, algunos consejos diseñaron planes de acción que inicialmente eran anuales o bienales y luego dieron lugar a iniciativas con mayor proyección a futuro (FRENKEL & COMINI, 2014, 62).

similar roles to the Organization of American States and, paradoxically, had the OAS as a model for its operational capacity and legitimacy as a regional organization (BRAGATTI, 2016, 2019; VILLA & BRAGATTI, 2015, WEIFEN, WEHNER & NOLTE, 2013).

The construction of South America as a region with its own set of rules and conflict resolution regimes was visible in the defence field and this was one of the areas that had been further developed within the UNASUR initiatives. Its main expression was the South American Defence Council (CDS), created in 2008, which represented the core of the defence cooperation regime (FALOMIR LOCKHART, 2013). On the discursive side, the objectives of this institution were to preserve stability in South America, as a zone of peace, and the formation of a South American vision of defence, to identify threats and risks, to coordinate actions and articulate a common position in the international forums (UNASUR, 2008).

THE CREATION OF THE SOUTH AMERICAN DEFENCE COUNCIL - CDS

"The empirical matter of international politics is perception", according to Héctor Saint-Pierre (2009). In addition to the benefits that South American regionalism can bring to the economy, there is an important symbolic and ideational dimension. Concepts, ideas and values that permeated the creation and conformation of UNASUR and, the CDS more specifically, are important elements for building confidence, generating perceptions and definitions of threats and models of defence and military cooperation in the continent. As Riggirozzi & Tussie (2012) emphasize:

> "Regionalism is not only the institutionalization of cross-border practices, but also a reflection of transformations in the regional space. What region means for the state and non-state actors is signified and resignified as motivations, interests, ideas, narratives and political, economic policies undergo changes. Region is,

> paraphrasing Wendt (1992), what actors make of it" (RIGGIROZZI & TUSSIE, 2012, p. 2).

The construction of South America as a region with its own set of rules and conflict resolution regimes was visible in the defence field and this is one of the areas that has been further developed within the UNASUR initiatives. Its main expression was the South American Defence Council (CDS), created in 2008, representing the core of the defence cooperation regime (FALOMIR LOCKHART, 2013).

"The South American Defence Council is based on a set of consensus and some exclusions that allow the realization of the implementation of its capabilities to be a political forum for dialogue on defence issues", according to Gonzalo García Pino, Chilean former president of the Working Group of the CDS:

> "In this sense, it has a set of exclusions, such as the definition of what is a Defence Council and not of security issues. It is also a forum for political gathering and not a military alliance. Therefore, it is a space for dialogue that is built for a new stage and not directed against any country. It was not born to oppose US defence policies in the region"[28] (CDS UNASUR, 2009, p. 37).

The defence of democratic principles and the tradition of non-interference in internal affairs of South American countries were guaranteed within the Defence Council, in the assessment of Bernal-Meza:

> "The CDS confirms peoples' self-determination, full respect for democratic institutions, and protection of states against internal or external threats or actions. It promotes and aims to ensure respect for human rights, the sovereign defence of natural resources and the promotion of confidence and transparency measures in military and defence matters. It has several working groups, which, from methodological definitions, are reflected for example in investments in the production and defence industry. Since

[28] En este sentido, tiene un conjunto de exclusiones, tales como, la definición de que se trata de un Consejo de Defensa y no de asuntos de seguridad. Asimismo, es un foro de encuentro político y no una alianza militar. Por lo mismo, es un espacio de diálogo que se construye a favor de un nuevo escenario y no va dirigido en contra de ningún país. Particularmente, no nace para oponerse a las políticas de defensa de Estados Unidos en la región (CDS Unasur, 2009, p. 37).

> November 2012, Brazil has coordinated a regional project to produce military training aircraft and unmanned aircraft systems. The main objective in this regard is the creation of a South American defence industry, as well as the training of specialized personnel in the region, reducing the influence of the Pentagon's military training system in the region"[29] (BERNAL-MEZA, 2012, p. 13).

In the 1990s, the concept of "new threats" brought a broadening of the scope of concern with respect to international security, having an impact on South America. In the definition of Medeiros Filho (2010):

> "We call "new threats" to the set of concerns that, in particular, because of their transnational character, pose serious challenges to the security of States. They are threats that, precisely because they do not start from a political actor, but from vulnerabilities present in the social structure itself, do not necessarily demand military solutions"[30] (MEDEIROS FILHO, 2010, p 13).

Another impact of this agenda of new threats, according to Villa (2013), was the United States proposal for a "new architecture of the inter-American system", centred on the establishment of Conferences of Defence Ministers in the Americas and, at its first meeting, in 1995, the United States "expressed its desire for the Armed Forces of South American countries to participate, together with the national police, to combat the eradication of coca crops and other perceptions of non-territorial threats such as terrorism, drug trafficking and even migration" (g. 96).

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[29] El CDS ratifica la autodeterminación de los pueblos, la plena vigencia de las instituciones democráticas y la protección de los Estados frente a amenazas o acciones internas o externas. Promueve y busca asegurar el respeto de los derechos humanos, la defensa soberana de los recursos naturales y la promoción de medidas de confianza y transparencia en asuntos militares y de Defensa. Tiene distintos grupos de trabajo, desde metodológicos —en asuntos de contabilidad de gastos militares— hasta de producción de insumos destinados a la Defensa. En particular, desde noviembre de 2012 Brasil coordina un proyecto para la producción regional de aviones militares de entrenamiento y un sistema de aviones no tripulados. El principal objetivo, en este sentido apunta a la creación de una industria de defensa sudamericana y promover la formación y especialización en la región de cuadros de altos oficiales, restando influencia, es este sentido, al sistema de formación militar del Pentágono destinado a la región (BERNAL-MEZA, 2012, p.13).

[30] Denominamos “novas ameaças” ao conjunto de preocupações que, especialmente pelo seu caráter transnacional, representam sérios desafios à segurança dos Estados. São ameaças que, justamente pelo fato de não partirem de um ator político, mas de vulnerabilidades presentes na própria estrutura social, não pedem necessariamente soluções militares (MEDEIROS FILHO, 2010, p 13).

> "The transnational characteristic of organized crime has therefore contributed to complicate the regional scenario. In border areas, problems of national defence and public security are mixed, leading to a situation where security problems (crimes) are perceived as defence issues (wars)"[31] (MEDEIROS FILHO, 2010, p. 13).

These attempts by the United States at that time generated a convergence among the military of the region, who were opposed to the proposal (SOARES, 2008).

The CDS avoided entering more emphatically into security aspects, even in a region heavily affected by actors and non-state and transnational security processes such as drug trafficking, organized crime, smuggling of arms and people, presence of guerrilla or paramilitary insurgent groups, urban violence, among others. In its place, the CDS restricted itself to the notion of defence.

For some authors, such as Héctor Saint-Pierre, the strictly military focus on defence issues - or "hard defence" - of the CDS is well founded. This would prevent the armed forces of the countries of South America from being used to solve public security problems and to focus on national defence (SAINT-PIERRE, 2011).

However, "intermestic" issues are a problem in the region, with potential for overflowing and escalation of international conflicts and tensions, as seen, for example, in the episode of the assassination of leader of the FARC, Raul Reyes, for Colombia when he was on Ecuadorian soil. In this sense,

> "The expansion of interdependence between the countries of the region and the consequent growth of regional networks of "common threats" has brought about changes in the geopolitical framework of South America. One of the features of this new framework is the concentration of problems on the borders (transnational crimes) to the detriment of border issues (territorial conflicts). Such a scenario, which seems to suggest a reversal in John Herz's security dilemma idea, where the threat ceases to be the strong neighbour and becomes the weak neighbour and where

[31] O caráter transnacional do crime organizado tem contribuído, portanto, para complicar ocenário regional. Em áreas de fronteira, problemas de defesa nacional e de segurança pública se misturam, podendo conduzir a uma situação em que problemas de segurança (crimes) sejam percebidos como questões de defesa (guerras)(MEDEIROS FILHO, 2010, p. 13).

> security problems "do not separate us, but rather unite us" (VILLA & MEDEIROS FILHO, 2007, p. 8).

This expansion of contact and of areas of insecurity, possible tensions and conflict creates a worrying situation. As Oscar Medeiros Filho (2010) points out, the countries in the region are still to agree on international security and defence,

> "Especially in border areas, the growth of the circulation and the construction of "doors" to regional cooperation, paradoxically, have amplified and potentiated the passage of transnational threats (regional networks of drug trafficking, kidnapping, arms trafficking, etc.) in large part through clandestine routes. Expanding concerns about transnational security issues is a demand for the shared treatment of threats and tends to pave the way for the harmonization of "border" security policies, creating favourable conditions for the emergence of institutions and networks of governance between the countries of the region"[32] (MEDEIROS FILHO, 2010, p. 12).

One of the main foundations of the Defence Council was the concern of many governments over the possible escalation of conflicts between neighbouring countries. The pinnacle of tension was the attack by the Colombian Armed Forces against the Colombian guerrilla camp in Ecuador, with the invasion of Angostura in March 2008, which resulted in the assassination of Raul Reyes, leader of the Revolutionary Armed Forces of Colombia (FARC). Another reason was the reactivation, also in 2008, of the Fourth Fleet by the US and the installation of US military bases in South American territories, such as in Colombia and Peru, causing great concern to progressive and leftist governments as a threat to the autonomy and preservation of democracy in the region (FONSECA, 2011; GALERANI, 2011; FRENKEL, 2016; FUCCILLE & REZENDE, 2013; MIRANDA GONÇALVES & BRAGATTI, 2018a, 2018b).

[32] Especialmente em áreas de fronteira, o crescimento da circulação e a construção de “portas” para a cooperação regional, paradoxalmente, ampliaram e potencializaram a passagem de ameaças transnacionais (redes regionais de narcotráfico, sequestro, tráfico de armas etc) em grande parte através de vias clandestinas. A ampliação das preocupações com questões de segurança transnacional constitui demanda para o tratamento compartilhado das ameaças e tende a abrir caminho para a harmonização de políticas de segurança “na fronteira”, criando condições favoráveis para os surgimento de instituições e redes de governança entre os países da região (MEDEIROS FILHO, 2010, p. 12).

As Carmen Fonseca (2011) points out, the countries of the southern Atlantic region, in particular Brazil, interpreted the reactivation of the fourth fleet differently and "understood the American attitude as a way of militarizing a peaceful area and wanting to enter that area due to energy interests and oil discoveries made by Brazil"[33] (p. 82).

Several authors indicate a variety explanations for the motivation of creating the UNASUR Defence Council, especially for Brazil, which would see the CDS as a tool to control and assure stability in its zone of influence (Sanahuja, 2009); to establish itself as a regional leader (Serbin, 2010); as a step towards a permanent seat on the United Nations Security Council (GRATIUS, 2007).

However, consolidation of the UNASUR Defence Council faced problems, especially in the continent's regional geopolitical sphere, which would involve the development of a more sophisticated conflict resolution mechanism that was still absent from the CDS, and the potential for conflicts have not been solved. According to Pagliari,

> (...) "some possibilities for interstate conflict persist because of border issues not completely resolved. They stand out: between Chile and Bolivia for this to claim their right of exit to the sea; between Colombia and Nicaragua, as a result of the dispute over sovereignty over the archipelago of San Andrés; between Colombia and Venezuela regarding the delimitation of the continental shelf of the Gulf of Venezuela (or Gulf of Maracaibo); Venezuela and Guyana on the Essequibo river basin" [34] (PAGLIARI, 2011).

The potential for conflict mentioned above by Pagliari reinforced the objectives of UNASUR and the CDS, since one of the main bases of the formation of the Defence

[33] Entenderam a atitude americana como uma forma de militarizar uma área pacífica e de quererem entrar naquela área devido aos interesses energéticos e às descobertas petrolíferas feitas pelo Brasil, acrescentando que a reactivação da IV Esquadra se apresentava como uma ameaça às reservas de petróleo no mar (FONSECA, 2011, p. 82).

[34] (...) algumas possibilidades de conflito interestatal ainda se mantêm em decorrência de questões de fronteira não completamente resolvidas. Destacam-se: entre Chile e Bolívia por esta reivindicar seu direito de saída para o mar; entre Colômbia e Nicarágua, em decorrência da contestação à soberania sobre o arquipélago de San Andrés; entre Colômbia e Venezuela quanto a delimitação da plataforma continental do Golfo da Venezuela (ou Golfo de Maracaibo); Venezuela e Guiana acerca da bacia do Rio Essequibo (PAGLIARI, 2011).

Council was the concern of many governments with the possible escalation of conflicts between the neighbouring countries.

The CDS introduced an important geopolitical innovation in the hemisphere. Since the formation of the Hemispheric System of security and defence institutions after the end of World War II, it was almost impossible to think of any such structure in which the United States was absent. The CDS was the first Latin American regional defence structure in which the United States has no participation in its formulation or policy-making process (VILLA & BRAGATTI, 2015).

However, the process that led to this result, did not mean a traumatic and conflicting process between South American countries and the United States, in which it also differed from the process that led to the emergence of ALBA's defence concepts: “It was only possible to erect a structure like the CDS without open confrontation with Washington”, according to Fuccille, who argues that the CDS is a process hitherto somewhat consented by the United States (FUCCILLE, 2014b).

Still, in the view of Saint-Pierre and Montoya, while the CDS did not contemplate creating a military alliance, as proposed by Venezuela, the strategic priority of integration of the defence industries is an adequate way to consolidate confidence and, at the same time, autonomy and self-sufficiency of the region (SAINT-PIERRE & MONTOYA, 2014).

On the institutional front, the CDS began to develop a certain organizational structure in its years: in addition to the Centre for Strategic Defence Studies (CEED), in Buenos Aires, there was also the creation and inauguration of the South American Defence School (ESUDE), based in Quito. Other actions reinforced and stimulated defence cooperation on the continent, such as the definition of Action Plans in the area and the creation of a common methodology for measuring military spending on defence and exchange in military training and training (FUCCILLE, 2014b).

The CEED was an instance of production of strategic studies, a think tank, whose mission was the generation of knowledge and diffusion of a South American strategic

thinking in terms of defence and regional and international security, on the initiative of the CDS (FRENKEL, 2016).

In recent years, several overlapping and competing initiatives and arrangements have been created and operated in the area of defence and international security in South America, along with the CDS and its Centre for Strategic Studies (CEED, for its acronym in Spanish) and the Defence College (ESUDE, acronym in Spanish); and, in the case of the Bolivarian Alliance for Latin American Peoples (ALBA), the School of Defence and Sovereignty (BRAGATTI, 2019; VILLA & BRAGATTI, 2015).

This proliferation of initiatives and models of regionalization and cooperation, due to their diversity, competition, overlap and superimposed functionality, has been described as a process of "complexification" of international security and defence institutions in South America (VILLA & BRAGATTI, 2015). This process reflected political and ideological pluralization in the region, impacting South American security and defence institutions and architecture, which, in defining regional objectives and responses, seek to differentiate themselves from hemispheric and extra-regional institutions. These initiatives seek to adapt to specific needs, risks and threats, as well as to the interests of self-defence and security promoted by some South American state actors (VILLA & BRAGATTI, 2015).

In studying competition and overlapping between UNASUR and OAS, Weiffen, Nolte & Wehner (2013) argue that regime complexity is an "enigmatic phenomenon", since it is not very clear why countries seek to form entirely new institutions in areas that are competence of established institutions (p.372). UNASUR itself faces competition and overlapping with institutions such as ALBA, which has very similar processes and instruments in the area of security and defence at the sub regional level. Many authors have analysed the proliferation and complexity of overlapping and competing institutions. Weiffen, Nolte & Wehner explain that

> "International Relations scholars have coined the concepts of 'regime complexity' or 'inter-organizational networking' to study the relationships between institutions that intersect with respect to

> their geographical domain and / or functional scope" (WEIFFEN, NOLTE & WEHNER, p. 372)

The institutional overlap can generate more opportunities for differentiated strategies for the countries of a given region. Among them, the possibility of *a la carte* use of multilateral cooperation, also offering member states the opportunity to opt out of certain political-institutional arrangements to seek and/or lobby for their political preferences in another institution (WEIFFEN, NOLTE & WEHNER, 2013).

The formation of a new institution can also be a means to seek to balance power or to exclude a dominant power in the region. The authors indicate that the intersection of UNASUR and ALBA can be defined as an “overlap constellation”: while Venezuela, Ecuador and Bolivia are part of both organizations, ALBA and UNASUL have members that are not part of either organizations (WEIFFEN, NOLTE & WEHNER, 2013, p.375).

Villa & Bragatti (2015) noted that, at the end of 2008, the South American Defence Council was formalized within the framework of UNASUR; three years later, ALBA created its own Defence School. Both processes, according to the authors, reflected and recompose the processes of pluralization of the hemispheric security architecture and fragmentation of the regional integration processes (VILLA & BRAGATTI, 2015).

Villa & Bragatti indicated that, also in 2008, coinciding with the creation of the CDS, ALBA formed a defensive military alliance between Venezuela, Cuba, Bolivia, Ecuador and the Dominican Republic, with an agenda articulating: 1) a joint defence strategy, articulating the armed forces and intelligence corps; 2) a collective security mechanism; 3) a regional army; 4) a School of Defence. The authors indicate, however, that the CDS was a pragmatic forum based on: 1) an understanding mechanism on consultation and coordination in the field of defence and security; 2) a forum for annual meetings of the Armed Forces Major States; 3) a forum for exchange in the area of military education of military education; 4) a mechanism for sub regional participation in peacekeeping; 5) a forum for the construction of identities in defence, and a common

vision of security and defence, based on specific needs and common interests of the countries of the region (VILLA & BRAGATTI, 2015).

Comparatively, both defence schemes, UNASUR and ALBA, were articulated in a double dynamic of competition and complementation, still in the assessment of Villa & Bragatti (2015), and the discourses of both organizations emphasized their military objectives of regional autonomy in relation to the United States and other powers, seeking to create their own defence and security alternatives (VILLA & BRAGATTI, 2015).

In addition, several authors underscored the serious limitations of South American defence cooperation initiatives. According to Regueiro & Barzaga (2012), there were no indications in concrete policies that point to a convergence between the countries and the various processes in this space. There were deep differences in relation to core issues, and the basic policy of countries and integration priorities have not changed (REGUEIRO & BARZAGA, 2012).

There was also a gap between political statements and effective actions of cooperation in Defence, according to Saint-Pierre & Montoya (2014). The authors pointed to the lack of common doctrine in defence initiatives in South America, where new military doctrines for cooperation in this area have not been elaborated or assimilated and, in general, the strategic designs still anachronistically reflect the expectations prior to the end of the Cold War: "(...) the attitudes that point to regional cooperation in the area of defence are confined to confidence-building gestures, still far from obeying a design consistent with a cooperative process" (SAINT-PIERRE & MONTOYA, 2014, p.35).

There was a tension between the institutionalization of South American space itself and the reconciliation of multiple spaces of regional insertion and, on the other hand, the need to provide the institutional spheres with enough credibility (PEÑA, 2009). Conceptually, the process of deepening and implementing an expression of identity and common interests in the South American defence area at the institutional level is complex and difficult, in a context where plural perceptions in defence prevail (VILLA & BRAGATTI, 2015).

THE DISBANDMENT OF UNASUR

Some authors have been diagnosing the reasons for the disbandment of the institution. Detlef Nolte and Víctor M. Mijares (2018) underscored that UNASUR was the result and the common denominator of different regional projects, led mainly by the former presidents of Brazil, Luiz Inácio Lula da Silva, and of Venezuela, Hugo Chávez; the authors stress that other countries of the region joined the project with divergent interests. With the political changes in several South American countries, the indefinite suspension of 6 nations from the organization would be a step in the disintegration of the South American project as a geopolitical bloc and relevant actor in the international system. However, the authors emphasize that from the outset UNASUR possessed the germ of its current crisis and its potential self-destruction, due to the lax organization design, the pre-eminence of national autonomies over regional integration and the lack of a supranational institutionalism of the bloc, what the authors call a “paradox of autonomy” (MIJARES & NOLTE, 2018).

In relation to these “disintegration” movements, Colombia's entry into the North Atlantic Treaty Organization (NATO) and a possible distancing of the country from regional organizations is considered a mistake by authors such as Juan Gabriel Tokatlián (2018). In addition to joining NATO, shortly thereafter, in 2019, Colombian President Ivan Duque announced plans to create yet another new regional bloc, with the aim of isolating Venezuela; the proposed group, to be called “PROSUR”, would focus on defending democracy and free-market economies (Associated Press, 2019).

The deep political and economic crisis that engulfed the region in recent years, bringing governments down and changes in political and ideological orientation, has cemented the disintegration of the organization. However, just as there were moves towards creating other institutions, there were also movements towards a possible re-articulation of UNASUR (GLOBO, 2018).

The sharp changes in political orientation and regional strategy reflects the lack of long-term thinking, while indicating the impact of the strong presidentialism in the region (MAINWARING & SHUGART, 1997), along with the *Presidencialismo de cumbre*, where decisions are made at meetings or ad-hoc gatherings and largely depends on the figure of the president.

Figure 6: Contemporary South American conflicts

Source: COSTA, Wanderley Messias (2009). O Brasil e a América do Sul: cenários geopolíticos e os desafios da integração, *Confins*, 7 | 2009, p. 15

Chapter 4

EXPLAINING CONFLICTS, COOPERATION AND SECURITY IN SOUTH AMERICA

INTRODUCTION

In *Clouds, Clocks and the study of Politics*, Almond & Genco (1977) use a metaphor to exemplify the differences between the so-called "hard" sciences (natural or exact) and the humanities: the natural sciences are compared to a clock for its precision, predictability; the human sciences would resemble clouds, because of their imprecise, irregular, "impressionistic", subjective qualities. Although these images seem to offer a very clear distinction between these sciences, the authors emphasize that the natural sciences present many questions and examples that put in check or at least strongly shake this image of precision, while the human sciences, still according to the authors, present in many instances elements of constancy, regularity. The natural sciences, the authors summarize, would also be quite like clouds; and the human sciences, would have a lot in common with clocks (ALMOND & GENCO, 1977).

One of the most important thinkers of Philosophy of Science, Popper (1959) argued that science has a sense of progress, with the work of new scientists accumulating earlier works and new discoveries. Popper emphasized the impossibility of scientific confirmation and instead proposed the use of “falsification”, in the sense that an assertion, idea, hypothesis or theory can be refuted and shown to be false; thus, knowledge and science are constantly changing.

For Kuhn (1962), instead, science is composed of concepts, rules and practices - which he called "normal science" - which are replaced from time to time by new sets of concepts, rules and practices (which are incomparable to earlier sets - in a principle which Kuhn called "incommensurability") established in times of ruptures, or "scientific revolutions" (KUHN, 1962).

With these elements in mind, it is possible to find in Lakatos (1970) a dialogue between some ideas and proposals of both Popper and Kuhn. Lakatos worked as Popper's assistant at the London School of Economics (LSE) and often stated, according to Godfrey-Smith (2009), that his main ideas about science were implicit in Popper or represented some aspects of concepts formulated by Popper. However, as Godfrey-Smith points out, "it is better to consider the ideas of Lakatos on its own terms" (GODFREY-SMITH, 2009, p. 103).

In *The Changing Logic of Scientific Discovery* (1970), among other works, one of the main contributions of Lakatos was the idea of a research program. A research program is historical and evolves over time: it is formed by a sequence of related theories, in the view of Lakatos. Thus, later theories are developed in answers related to previous theories and so on.

In *Analytic eclecticism in the study of world politics: reconfiguring problems and mechanisms across research traditions*, Sil and Katzenstein (2010) depart, instead, from the concept of a *research tradition* as articulated by Larry Laudan (1996), indicating that different from Kuhnian paradigms and Lakatosian research programs, “Laudan’s research traditions can coexist and compete for long periods of time, generating substantive claims that may overlap with those produced in other traditions” (SIL & KATZENSTEIN, 2010, p. 413).

Stressing that Laudan acknowledges the possibility of a single scholar working in different traditions even if these traditions may be considered by some to be incommensurable, Sil and Katzenstein propose this approach, emphasizing that

> “Analytic eclecticism is not an alternative model of research or a means to displace or subsume existing modes of scholarship. It is an intellectual stance that supports efforts to complement, engage, and selectively utilize theoretical constructs embedded in contending research traditions to build complex arguments that bear on substantive problems of interest to both scholars and practitioners” (SIL & KATZENSTEIN, 2010, p. 411).

For Feyerabend, it is often necessary for science (or scientists) to be liberated, free from dogmas, and to make use of creativity. One of Feyerabend's most famous works was *Against the Method* (1975). In this work he defended what he called "epistemological anarchism". As Oberheim and Hoyningen-Huene (2018) indicate, the idea of incommensurability was used by Feyerabend to attack conceptual conservatism implicit in models of theory testing promoted by classical empiricists, logical positivists and logical empiricists.

In *The Conduct of Inquiry in International Relations: Philosophy of Science and Its Implications for the Study of World Politics*, Patrick Jackson (2010) gives his insight on the philosophical debates in social inquiry, suggesting that we must be pluralistic about the answers and 'put the ontology first':

> (...) “the challenge is to abstract from existing controversies so as to focus them and ultimately make them more productive, and to do so in a pluralistic way that highlights a diversity of approaches to “science” rather than seeking imperialistically to foreclose discussion by promulgating a narrow and uniform definition" (JACKSON, 2011, p. 34).

In *Explaining and Understanding International Relations Theory*, Hollis & Smith (1990) summarize that in social sciences there are two intellectual traditions: one founded on the rise of natural Science since the sixteenth century, or the “scientific tradition”; the other rooted in nineteenth-century ideas of history and the writing of history from the inside, or, as the authors call it, the “interpretative tradition”, where IR is considered heir not only to the tradition of scientific explanation, but also to one of historical understanding (p. 1-3).

Within these traditions, still according to Hollis & Smith, there are three general approaches in the discipline of IR, usually called Realism, Pluralism and Structuralism:

- Realism: the states are the main actors and the processes in international relations as a search for security; states are monoliths with interests; their main interest being the maximization of power;

- Pluralism: the state remains an important actor, but other non-state actors are important and reduce its autonomy; as subnational, supranational and transnational actors challenge the dominance of the state; foreign policy is more about managing an environment composed of diverse politicized areas;
- Structuralism: the state is still a dominant actor in international relations, but, recalling the Marxist theme that the state is the tool of the dominant class in society, it represents a set of economic interests in the international/global arena (HOLLIS & SMITH, 1990, p. 39-41).

Hollis & Smith emphasize that the IR approach of Realism (and Neo-Realism) – even if it is divided whether to pitch the level of explanation at the system or its units – , is a call for the application of the scientific method, claiming to offer scientific explanations. The authors indicate that Realism was able "to make a quick conquest by importing a neat idea and powerful idea of science and showing how an economics-style analysis of nation states as pursuers of national interest scored high as science" (p. 88). The authors stress, however, that this approach might be vulnerable not only by changing ideas of natural science but also to hermeneutic ideas about how the social world should be understood.

In Latin America, according to Tickner (2003), an average of 53% of texts studied in IR university courses is dedicated to Realism, Neorealism and Neoliberalism, while 11% were dedicated to Liberalism and Interdependence Theory (p. 11).

In terms of methodology, another issue, even within the mainstream approaches, in the view of Mearsheimer & Walt (2013), is that articles published in the major journals in the US employ quantitative methods more than any other, and most of the effort is devoted to collecting data and testing empirical hypotheses. In the view of Mearsheimer & Walt, more than hypothesis testing, the creation and refinement of theory is the most important activity in *social sciences* and this is particularly important

in IR, because of the complexity and diversity of the international system and the “problematic nature" of the available data (MEARSHEIMER & WALT, 2013, p. 429).

> “The study of IR should be approached with humility. There is no single theory that makes understanding world politics easy, no magic methodological bullet that yields robust results without effort, and no search engine that provides mountains of useful and reliable data on every question that interests us. We therefore favour a diverse intellectual community where different theories and research traditions coexist" (MEARSHEIMER & WALT, 2013, p. 449).

Authors such as Adler & Greve (2009) and Battaglino (2012), in the South American propose that there is a need to adopt "multi- perspective" approaches in the study of international security in the region. As a field of study, IR is strongly influenced by the traditions of disciplines such as History, Sociology, Law and Economy among others, which confers to IR a possibility of cross-disciplinary engagement, with a diverse toolbox of research methods.

More on the discussion about IR approaches and Philosophy of Science and Social Sciences in the next chapter, since some of the arguments are at the core of schisms and divisions found in the discipline of IR.

For now, we look into the main approaches to explaining cooperation and conflicts in South America. The aim of this chapter is not to consist of a literature review (“state of the art", or in Portuguese and Spanish, *marco teorico*), but to present a selection of works with some insights and findings which substantiate and compose our argument, along with other sources, in the last chapter and final considerations.

EXPLAINING INTERNATIONAL SECURITY IN SOUTH AMERICA

As emphasized in the first chapters, historical factors are fundamental to understanding the configuration of Defence and international security in South America.

We also pointed out that Geopolitical thinking has guided internal and foreign policy, to a greater or lesser degree, in a number of countries in the region, notably in certain periods - as in the military governments - making this approach an important framework of analysis, along with perspectives on Regionalism.

As in the mainstream perspectives in International Relations at the global level, most authors see in Realism-Neorealism and its variants the most appropriate approach to explain the international security in the region. These analyses focus on processes of balance of power, security dilemma, hegemonic stability theory, arms race and militarization applied to the South American context (SCHENONI 2014, 2015; REZENDE, 2013; MARES 2001, 2012, 1998).

Other scholars emphasize institutionalized cooperative processes and peace practices in South America, analysing elements of security community in the region as a whole, or at sublevel, and the ensuing debates as to whether the region constitutes (or could become) a security community (HURRELL, 1998; ADLER & BARNETT, 1998; FLEMES & NOLTE, 2010; OELSNER, 2016).

Approaches stimulated by the so-called "Third Debate" of IR have broadened the scope of the studies, notably using Constructivism as a basis and focusing on the analysis of issues such as the role of epistemic and practice communities in the regional context (VITELLI, 2015).

From the seminal studies of Buzan and Waever (2003), a number of authors have adopted Regional Complex Theory as a fundamental instrument (MEDEIROS FILHO, 2010; FUCCILLE & REZENDE, 2013; OLIVEIRA, 2013; PAGLIARI, 2015). This fact is evidenced by the profusion of scientific articles, dissertations and theses that use this theory / conceptualization, mostly in connection with other mainstream theories.

Some authors, more recently, detect the limits of strict adoption of mainstream theoretical frameworks and propose multicausal/multi-perspective approaches (ADLER & GREVE, 2009; BATTAGLINO, 2012). The analysis of institutional overlap and configuration of security governance also constitutes an important perspective for the

understanding of the contemporary regional context (FLEMES, NOLTE & WEHNER, 2010; WEIFFEN & VILLA, 2014; ADLER E GREVE, 2009; FLEMES & RADSECK, 2012).

In analysing the incidence of wars and interstate violence in South America, Holsti (1996) calls the region “an intriguing anomaly”. The fact that the region has not gone through a significant war between its nations since the 1940s, even having several unresolved disputes and potential conflicts, and yet has a high incidence of internal conflicts and highest levels of violence and murders in the world, expresses some of the South American characteristics. Explaining and understanding conflicts, tensions, approximations, cooperation and enmities are a challenge for specialists and analysts in international security dedicated to study and theorize about the region.

The main approaches to the studying security and Defence in South America can be summarized as focusing on:

- Militarization and logic of balance of power;
- institutionalized cooperation and prevalence of elements of security community, with the discussion on to which degree South America as a whole or on a subregional level constitutes a security community;
- the study of institutional overlap and architecture of international security and security governance of the region.
- the framework of the Regional Complex Theory of Security, based on the work of Buzan and Waever, however mostly with other mainstream theories;

We begin, then, studying works with a perspective of balance of power and militarization in the South American region; next, we discuss some elements of the Regional Security Complex Theory and its use in the region; the analyses focused on Security community in the South America; and the role of epistemic communities in the process that led to the creation of the CDS.

BALANCE OF POWER AND MILITARIZATION IN THE SOUTH AMERICAN REGION

In the text *Why Latin Americans continue to threaten each other: the use of military force in Intra-Latin American relations*, 2012, David Mares argued that the militarization of conflicts is seen as a tool of negotiation among Latin American states. Mares pointed to several instances in which not only the leaders of these countries saw and obtained gains in using the threat of inter-state violence, but also the lack of sanctions, tardiness and/or inaction of the regional institutions served as an "incentive" to this practice. The author argued that the decision to militarize conflicts almost always has popular support and some governments consider in their interest to do so and why citizens see such actions as legitimate.

The main factors of dispute and tension in Latin America, according to Mares, were:

- border disputes;
- ideological competition;
- competition between states over natural resources;
- new sources of dispute, such as the international drug trade; foreign private investment; of the armed forces in various countries.

Mares described the security architecture of Latin America as composed of a wide variety of international institutions (such as the International Court of Justice), regional, sub regional and bilateral institutions. This security architecture, the author indicated, does not have the task of preventing violence between states: overlapping regional security institutions do not follow an institutional protocol when dealing with a crisis, neither maintain a consistent approach to resolve disputes. Consultations and meetings of international security and Defence, according to the author, generally do not deal with disputes between Latin American nations, preferring to leave them for bilateral negotiations.

The costs of using militarized force, for Mares, are influenced by military political strategy of use of force, strategic balance with the rival nation, and the characteristics of the military force used. State interests have different aspects, depending on the relationship between the conflicting parties, for the author, as he synthesizes as five political-military strategies to militarize a conflict: keeping the issue alive; affect bilateral negotiations; defend the status quo; attract the support of third parties; impose a solution (MARES, 2012, p. 611).

What has changed in recent times in the strategic balance, according to Mares, was the capacity and credibility of the US and Latin America and its ability to contribute positively to peaceful conflict management in the region has declined. Brazil, in the analysis of Mares, is seen by many as the main interlocutor in terms of security in South America, because it would articulate peaceful solutions, supporting institutional frameworks to defuse conflicts. However, Mares pointed out that Brazil itself uses military power to influence relations with its neighbours, as the complaint by the then president of Paraguay, Fernando Lugo, that Brazilian military manoeuvres at the border occurred during tense moments of the renegotiation of the treaty review agreements regarding the Itaipu bilateral hydroelectric complex (MARES, 2012, p. 612).

The author suggests that the strategic balance in Latin America can be changed to always favour the status quo, if it developed a norm that would make the use of force illegitimate, not only to conquer territory, but also when it affects relations between state:

> "This would essentially make Latin America a collective security system: if the target of militarization cannot make action irrelevant, all other members would commit to impose sanctions on the initiator. From a strictly balance of power perspective, this would mean that status quo states would need to have sufficient capacities to defeat revisionist military adventures from the outset in order to deter others from provoking a crisis" (MARES, 2012, p.622).

In *Unveiling the South American Balance* (2014), Schenoni sees in neorealism the more appropriate approach to explain what he considers a regional "sub-reaction" to

the Brazilian ascent, in terms of power and economic capabilities. Analysing the period between 1985 and 2014, which he considered a moment of South American unipolarity, he argued that domestic variables - political instability and governability, low institutionalization of the party system and concentration of power on the figure of the president - explain why the political elites of the South American countries have not given priority to the challenges generated by the rise of Brazil.

Schenoni argued that even though South American nations do not envisaged the possibility of regional conflict in the short term, these countries have long-term strategies to maintain their autonomy, exemplified by diversification of trade diversification and international economic insertion in relation to Brazil and a relative degree of military readiness, which showed, according to the author, a form of balance of power in the region. Examples of this behaviour, the author indicated, were Chile and especially Colombia - both in the economic and military strategies (in the case of Colombia, the strategy of counterbalancing Brazilian power would be strongly based on the extra-regional alliance with the United States). In the analysis of the author, smaller countries such as Bolivia and Paraguay, and especially Uruguay, tended to adopt *bandwagon* behaviour; however, Argentina, Ecuador and Venezuela also, in general terms, adopted this behaviour. An element that would also explain these behaviours, still according to his analysis, would be the social fragmentation found in these countries, especially in the national political elites of those countries (SCHENONI, 2014).

REGIONAL SECURITY COMPLEX (RSC)

Buzan & Waever (2003) propose that it is at the regional level that the main threats and fears are realized, where neighbours develop patterns of friendship, enmity, alliances and distrusts. Regional Security Complex Theory (RSCT) would thus be a more appropriate tool for the systematic study of international security. However, according to the authors, the RSCT is not in opposition to either Realism or the Liberal schools of thought, but it complements them (p. 3). The authors emphasize that RSCT would be

more linked to the constructivist approach of IR, as it is based on patterns of friendship / enmity, perceptions of threat and other factors related to the interpretations that the actors make in their particular regions, based not only on "mechanical" power distribution factors (p. 11, 40).

RSCT is an intermediate level of analysis between States and the global system, where these extremes of national and global security interplay, and “refers to the level where states or other units link together sufficiently closely that their securities cannot be considered separate from each other” (p. 43).

Security is, thus, above all, a relational question, since Buzan and Waever differentiate two forms of relationship of structure and character of RSC: relations of power and patterns of friendship and enmity. Furthermore, “RSCT has a historical dimension that enables current developments to be linked both Cold War and pre-Cold War patterns in the international system” (BUZAN & WAEVER, 2003, p, 40).

Buzan & Waever stress that only by addressing the regional level is it possible to understand the relations between specific states and also the global dimension of international security. This is related to the patterns of rivalries, alliances and tensions that countries of a given geographic region build. The definition of a region has aspects beyond geographical proximity. One of the initial aspects to consider is the patterns of friendship / enmity, indifference, alignment, and distribution of power. These aspects are related not only to historical elements, but also to questions of border and territorial, populational, ideological and economic disputes, among others (BUZAN & WAEVER, 2003).

In the most basic level, Buzan & Waever define a Regional Security Complex as “a set of units whose major processes of securitisation, desecuritisation, or both are so interlinked that their security problems cannot reasonably be analyse or resolved apart from one another” (BUZAN & WAEVER, 2003, p. 44). The patterns of friendship / enmity would be interdependent, defined by interests and mediated by historical and geopolitical elements, as well as aspects such as the security dilemma, for example.

The *essential structure* of the RSC is composed of 4 aspects:

- limits (or borders) from one RSC to another and its subsystems;
- anarchic structure of the system, which causes the RSC to be formed by 2 or more autonomous units;
- polarity, with the distribution and competition of power between units; and
- "social construction" of patterns of friendship, enmity, threat and alliances. RSCs can range from "conflict zones" to "security communities".

The RSCT aims to create a subsystem that privileges the regional framework, where security regions formed by States are so close in security issues that they cannot be thought separately. Its theoretical foundation brings references of the Realist mainstream, of the Liberal theories, but mainly of the constructivism, because it thinks interdependence as fruit of the practice of the actors for security, who or what they securitize, that is, “security is what the actors make it” (BUZAN & WAEVER, 2003, p. 48).

The essential structure of a RSC is defined by two kinds of relations: power relations (balance of power) and patterns of amity/enmity, which are “historically derived” (p. 49, 50). Buzan & Waever list the main variables for the empirical support of the Theory of Regional Security Complexes, which are based on geographical proximity, added to an anarchic international system permeated by the power relations between states. The geographical component refers to the fact that states of limited power have their influence restricted, in general, towards their neighbours, that is, relations of security interdependence are based on the power of the units in question, the power exercised within the regional complex of security, in which the proximity experience added to the fears of the actors builds relations of friendship / enmity. Therefore, the variable for the theory exposed by Buzan & Weaver has in its core perceptions such as enemy, rival, friend, as elements of this configuration, and which will also explain the changes and behaviour of the units.

Thus, Regional security complex is an *analytical concept*, contingent on the *security practice* of the actor, stress Buzan & Waever. The authors propose 4 levels (*descriptive*) of RSC study:

- the domestic level of each state in the region;
- bilateral relations, from State to State;
- the interaction of the region with its neighbouring regions;
- the role of global powers within the region.

The set of these relations is called a "security constellation". The four levels are in constant operation, but the regional level is generally preponderant. With regard to the description of regional security complexes, the four levels considered, which are interrelated. Each level may be more or less relevant in each situation analysed, but the fundamental role of the regional outline is always present. These levels relate to four variables: boundaries, the existence of an anarchic structure of the international system, the polarity diversity of power relations, and the social construction of the various relations. Finally, there are three possible evolutions for the RSC, which are of maintaining the status quo, which will not cause change, of internal transformations to these complexes and of external to external transformations to them (BUZAN & WAEVER, 2003).

Buzan & Waever propose that Regional Security Complexes can be of two types: standard or centred:

- Standard: there is no presence of a global power, being the power defined in terms of regional polarity. It is possible to separate the regional dynamics from those influenced by the great powers, externally. In terms of the pattern of friendship-enmity, they may be conflictual, security regimes or security communities.
- Centred RSC appears in three ways: (1) unipolar, with the pole being a great power; (2) unipolar, the pole being a superpower; (3) centred,

but integrated by institutions, not by a regional power (such as the EU).

Standard RSCs may be, in terms of amity and enmity, according to Buzan & Waever:

> (...) conflict formations, security regimes, or security communities, in which the region is defined by a pattern of rivalries, balances, alliances, and/or concerts and friendships. Within a standard RSC the main element of security politics is the relationship among the regional powers inside the region. Their relations set the terms for the minor powers and for the penetration of the RSC by global powers (BUZAN & WAEVER, 2003, p. 55).

SOUTH AMERICA AS A REGIONAL SECURITY COMPLEX

The South American RSC is, according to Buzan & Waever (2003), “something of a puzzle” (p. 305), due relatively few interstate wars. However, the authors considered the region as “standard” RSC (with its security concerns being driven mainly by its own dynamics, not by a great power).

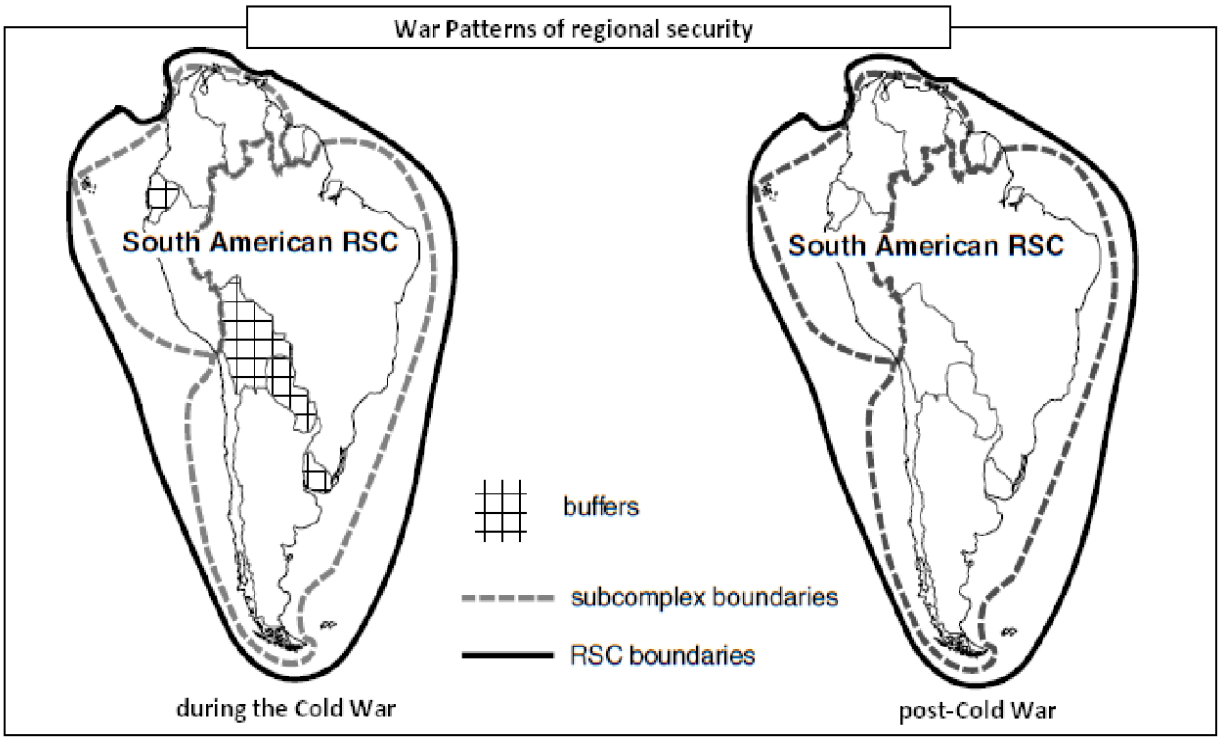
The United States is considered as an external actor in the South American RSC: although the US, in a “highly asymmetrical” relationship with South America, does influence the region and it is a “major factor” in the regional security calculations: “But the US engagement is not constant and the United States neither ‘rules’ the region nor even generally shapes it”, add Buzan and Waever (p. 309).

The configuration of RSC in South America, according to Buzan & Waever (2003) would be intermediate, that is, it would constitute a "security regime" (situated between “conflict formation” and “security community”), and its main security dynamics “predates, continued during and still exists after the Cold War” (p. 309). This RSC is divided by the authors into two regional subcomplexes: 1) the Southern Cone (Brazil, Argentina, Uruguay, Bolivia, Paraguay and Chile), which is “gradually pointing towards a security community”; 2) the Andean (Colombia, Venezuela, Ecuador, Peru, Suriname

and Guyana), which presents a conflictual and unstable situation, aggravated by transnational security problems (such as drug trafficking).

Fuccille and Rezende (2013) emphasized that, according to Buzan & Waever, South America is categorized as a "standard" RSC - that is, there would be no global power, with power defined in terms of regional polarity - and presented two relevant subcomplexes: the Southern Cone and the North-Andean. However, the Brazilian authors proposed that, due to the growing role of Brazil (at the time of their writing) in the issues of security and architecture of cooperation / consultation instances in these issues in South America, also being the articulator between the Southern Cone and the Andean-Amazonian regions, mainly in the construction of UNASUR and the CDS, the country would constitute a regional security power, thus becoming the centre of a "centred" - not "standard" RSC as Buzan & Waever had originally proposed (FUCCILLE & REZENDE, 2013).

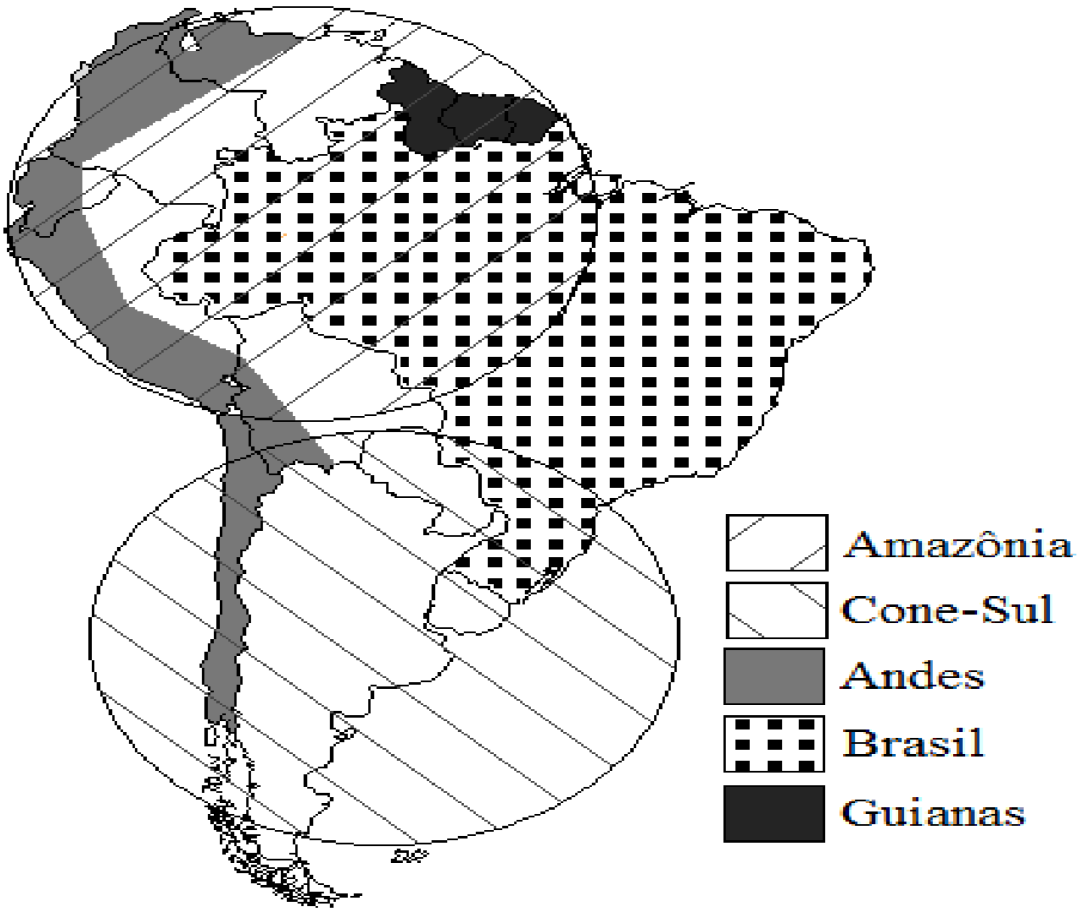
Figure 7: Regional security complex of South America



Fonte: BUZAN , Barry; WŒVER, Ole. Regions and Powers: The Structure of International Security. Cambridge: Cambridge University Press, 2003. p. xxvi

For this "new configuration" of the RSC of South America, according to Fuccille & Rezende, it was "necessary to see if Brazil is able to dominate the regional dynamics of security" (FUCCILLE & REZENDE, 2013, p. 85). Fuccille and Rezende indicated that there were reasons for this to occur, such as the fact that South America had its relative importance diminished in the US priority agenda, leaving Brazil free to explore the regional security dynamics and having the possibility to play a greater role, especially with the creation of UNASUR (and the South American Defence Council), which would make the country a central actor for the RSC. However, the authors emphasized that "the behaviour of Brazil, the main guarantor of the creation of the South American Defence Council, lacks coherence and presents itself numerous times in a diachronic way" (FUCCILLE & REZENDE, 2013, p. 92).

Figure 8: Regional portions of South America



Source: MEDEIROS FILHO, 2010, p. 63

Another proposition on how to characterize the South American region was presented by Medeiros Filho (2010), in which the continent can be divided into three areas, according to the international relations and security standards of each one:

1) Amazon: involves countries belonging to the Amazon Cooperation Treaty Organization, identified as a potential space for subcontinental articulation, and could become one of the pivots of South American integration. More than anywhere else in the subcontinent, it is in the Amazon that the so-called "new threats" are more mixed with the notion of "national defence", generating a complex of insecurity (p. 63), however, because it is a region of empty populational spaces, the perception of

"international greed" in relation to natural resources also generates another factor of regional identity, due to the concern of strategic interest of great powers outside the region;

2) Southern Cone: it corresponds approximately to the regional space of MERCOSUR and is marked by the relative success of the cooperative processes, where there are signs of overcoming traditional geopolitics of Hobbesian orientation, especially as regards the relation between its key countries: Brazil-Argentina and Argentina-Chile. It is the sub regional portion closest to the Security Community model;

3) Andes: a subregion with weak integrationist tradition, largely due to the persistence of distrust revealed in recent years, for example: Chile vs Peru, Peru vs Ecuador, Ecuador vs Colombia, Colombia vs Venezuela (op. cit. p. 63).

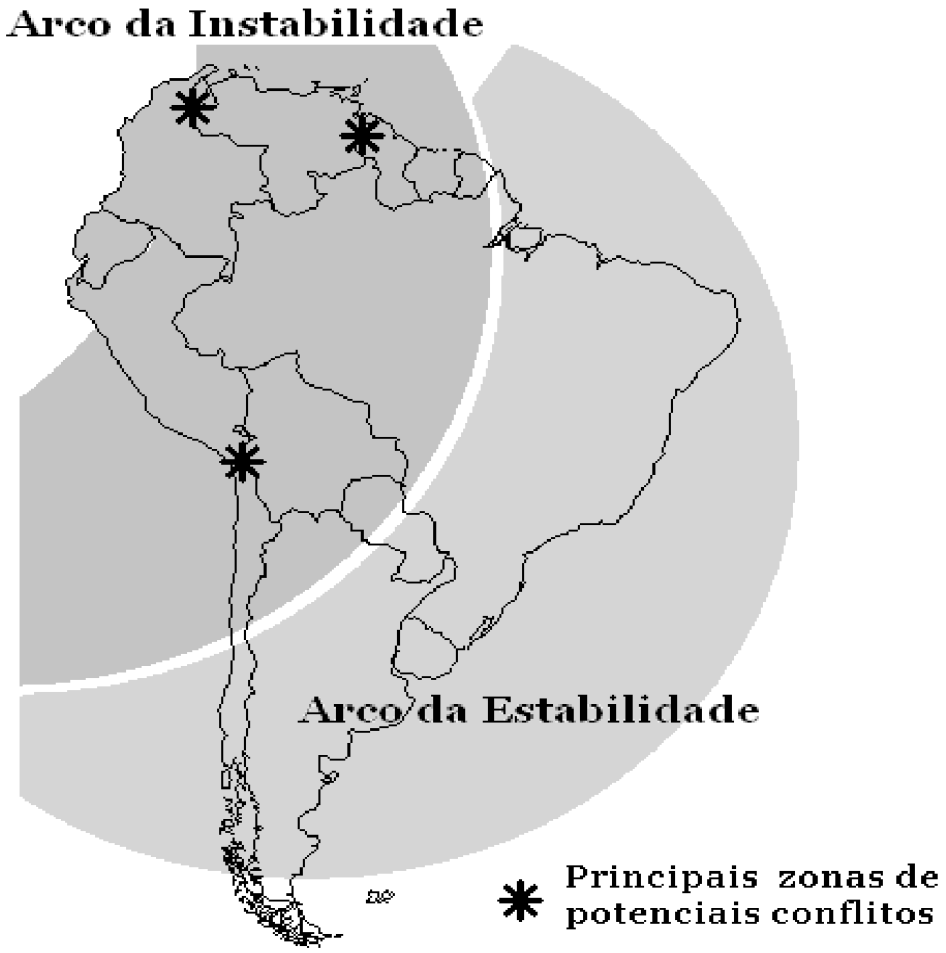
> (…) there seems to be a causal relationship between integration and regional stability. In general, the spatial irregularity of the regional integration process in South America points to spatially irregular levels of stability / instability. While the Southern Cone presents considerable success, the "Amazon" and "Andes" portions present much more modest levels of integration. It is precisely in these portions, where the integration process is more scarce, that there are areas of potential territorial conflicts, among which the borders between Chile, Peru and Bolivia stand out (Bolivia's Mediterranean situation today constitutes the greatest latent threat of territorial conflict in the subcontinent), the vicinity of Lake Maracaibo (Colombia-Venezuela) and the region of Essequibo (Venezuela-Guyana)[35] (MEDEIROS FILHO, 2010, p 63-64).

However, more in line with the RSCT, Medeiros Filho proposes another division of the region, which establishes two major arches: the "Arch of Stability" and the "Arch

[35] (...) parece haver, portanto, uma relação causal entre integração e estabilidade regional. De uma forma geral, a irregularidade espacial do processo de integração regional na América do Sul aponta para níveis de estabilidade/instabilidade tambémespacialmente irregular. Enquanto o Cone-Sul apresenta considerável êxito, as porções "Amazônia" e "Andes" apresentam níveis de integração bem mais modestos. É exatamente nessas porções, onde o processo de integração é mais escasso, que se localizam áreas depotenciais conflitos territoriais, dentre as quais se destacam as fronteiras entre Chile, Peru eBolívia (a situação mediterrânea da Bolívia se constitui hoje na maior ameaça latente de conflito territorial no subcontinente), as cercanias do lago Maracaibo (Colômbia-Venezuela) e a região de Essequibo (Venezuela-Guiana). (MEDEIROS FILHO, 2010, p 63, 64).

of Instability" - while the first would correspond to the Atlantic strip (extended Mercosur), the second refers to the portion where potential areas of armed conflicts persist, notably "Amazonia" and "Andes". (MEDEIROS FILHO, 2010, p. 65).

Figure 9: Arches of "stability" and "instability" in South America



Source: MEDEIROS FILHO, 2010, p. 65

SECURITY COMMUNITY IN SOUTH AMERICA

Deutsch (1957) describes a security community as that formed by different states that develop relations so close together that a sense of unity and a sense of "community" begin to exist and in which issues and disputes would always be solved by peaceful means, not involving the possibility of war[36].

The concept of security community, proposed by Adler and Barnett (1998), departs from the initial formulations of Deutsch in the 1950s and reinterpret it. From Deutsch's emphasis on material factors, Adler and Barnett propose a preponderance of shared norms, ideas, values, symbols, development of reciprocity, trust, and common identities. The authors believe that it is in the confluence between transnational factors, state power and international institutions that one can understand and conceptualize the different types of security communities.

Deutsch defined security communities in two types: "amalgamated" and "pluralistic." The amalgamation is one in which the states unite in a single unit, citing as an example the United States of America. The pluralistic one would be formed by several autonomous states and it is in this second type in which the approach of Adler and Barnett offers a deeper account (ADLER & BARNETT, 1998).

The concept of community is defined by three main characteristics, according to Adler and Barnett:

- shared identity, values and meanings;
- intense relationships and interactions in various fields and sectors;
- sense of reciprocity, responsibility and even altruism.

The authors propose three factors necessary for the development of a security community:

- precipitating conditions: they would involve economic interests, technological, migratory and population changes, among others;

[36] (…) there is real assurance that the members of that community will not fight each other physically, but will settle their disputes in some other way (DEUTSCH, 1957, p. 5).

- procedural and structural variables: involving commercial transactions, organizations, social learning, among others; and
- mutual trust and common identity.

In the South American context, some scholars recognise an emerging, a “loosely coupled”, partial security community in the region (BUZAN & WAEVER 2003; DOMINGUEZ, 2007; HURRELL 1998; KACOWICZ 1998; 2005; KACOWICZ & MARES 2016).

For Hurrell (1998), the formation of this South American security community is the result of a historical construction of the states of the region and the patterns of interaction among them, as well as the changes of national (and regional) identity, motivated by both domestic and international transformations that are reflected - and reinforced - by the process of interaction and institutionalization of cooperation in South America (HURRELL, 1998, p. 261).

Many years before the formation of UNASUR, Hurrell identified the beginning of a security community in South America. The author argued that the relationship between Brazil and Argentina was a fundamental factor in the construction of this community and (at that time) describes the "emerging security community" of South America, as "loosely coupled", and (at that time) imperfect, identified especially within the scope of MERCOSUR. However, Hurrell stressed that the rest of Latin America was still too anchored in traditional power politics for the region to be considered a security community (HURRELL, 1998).

Nolte, Wehner & Flemes (2010) argued that, with the creation of UNASUR and the establishment of the Defence Council (CDS), South America was in the process of constructing a security community, emphasizing that the region was far from being a mature security community. UNASUR and the CDS constituted important mechanisms of cooperation in security, according to Nolte, Wehner & Flemes, however, divergent material and ideological interests hindered a deepening of that process. As examples of these divergences, the authors cite the Brazilian individual agenda of global power projection, in addition to ideological differences between Venezuela and Colombia, and

Colombia-Peru-Chile and their agenda focused on economic interests and extra-regional agreements.

Nolte, Wehner & Flemes indicated that the CDS had established itself as a forum for dialogue and developed mutual trust measures, such as information exchange, transparency of military spending, promotion of cooperation and border surveillance, and declaring South America as a free area of nuclear weapons. However, the authors pointed out, for example, that some countries' arms purchases of extra-regional powers created distrust and discomfort in the region, as well the continued several disputes (especially territorial) and other unresolved issues between countries which form the bloc (2010).

One of the issues that Nolte, Wehner & Flemes cite among the problems in order to build a common security identity in the region, was that UNASUR could be exerting a role in creating a "zone of exclusion" (what the authors call "otherness") in relation to external/extra-regional actors, rather than the production of a sense of unity, or "we feeling", necessary for a consolidation of a security community. The institution, in the assessment of the authors, failed to affirm a consolidated position in the region, leaving open the possibility of inflection and complications that could jeopardize and reverse this trend in South America.

The role the epistemic communities play in shape cooperative or conflictive processes, among other processes, is increasingly important. Within the Constructivist approach, in *Re-Thinking Epistemic Communities Twenty Years Late* (2013), Mai`a Davis Cross emphasizes that epistemic communities are networks of specialists with potential to persuade and propose policies because of their professional knowledge. Professionalism, the author emphasizes, is a central attribute of epistemic communities and their relations with governments are often highly synergic. The role of epistemic communities is expanding significantly due to the complexification of transnational processes, involving not only governments, but also a wide variety of non-state actors. In that sense, epistemic communities support specific government policies, the author emphasizes, and more broadly shape elements of global governance.

In *Argentina, Brasil y la defensa en América del Sur: las identidades estratégicas y la seguridad regional* (2015), Marina Vitelli adopts the constructivist approach to focus on epistemic and practice communities, analysing the influence of ideational factors on defence cooperation between Brazil and Argentina. Vitelli argues that there was a convergence in the strategic identities of the two countries, which helped to lead to the creation of the UNASUR Defence Council (VITTELLI, 2015).

The convergences of strategic identities between Brazil and Argentina since democratization, according to Vitelli, which can be detected in strategic documents of the countries. The author emphasizes that a key role in the formation of Argentina's recent strategic identity was exercised by the epistemic community. This role, in the view of Vitelli, had been unfolding and developing since the democratization of Argentina to varying degrees and in different instances, such as forums for exchange of knowledge and experience, with participation academics and experts on the subject, but also including parliamentarians, politicians and the military.

In Brazil, according to Vitelli, the process involved more military personnel and, despite having a "strong and vibrant" epistemic community, that strategic identity ended up finding resonance in the political-strategic project of governments of different ideological spectrum - with the formation of the Ministry of Defence, elaboration of the national defence policy and white books of defence, meeting of the South American presidents, which culminated in the formation of CASA and later UNASUR (VITELLI, 2015).

Another element of coincidence between Argentina and Brazil (also shared by other South American countries) was opposition to the project to change the role and responsibilities of the region's armed forces (directing them to public security activities), Vitelli indicated. The author emphasized that the countries decided to abandon historical rivalry and build trust and transparency measures, along other cooperation processes, which helped to lead to the formation of the UNASUR Defence Council. The decision to securitize the natural resources of the region was another element of identification-convergence between Brazil, Argentina and other countries of the region. However, in 2015 Vitelli reiterated that these arrangements and coincidences "are far

from being petrified and are subject to the possibility of being modified" (VITELLI, 2015).

SECURITY GOVERNANCE, OVERLAP AND MULTI-THEORETICAL APPROACHES

A number of studies in international security and defence about South America adopt pluralist conceptual and\or theoretical approaches. Largely within a constructivist framework, in *When security community meets balance of power: overlapping regional mechanisms of security governance* (2009), Emanuel Adler and Patricia Greve propose that the "security mechanisms, institutions, and practices that sustain international orders, including balance of power and alliances, hegemony, security regimes based on regional or global institutions, public, private, and hybrid security networks, as well as different kinds of security communities (…) coexist across time and space, however, has not been adequately theorised" (p. 59).

Adler & Greve emphasize that balance of power and security community, often *coexist* or overlap in political discourse and practice. For the authors, 'balance of power' and 'security community' are not only analytically distinct structures of security orders but are also mechanisms based on a distinct mixture of practices. This opens up, according to the authors, the possibility of a complex and 'multi-perspective' vision of regional security governance. The authors define security governance as **"**a system of rule conceived by individual and corporate actors aiming at coordinating, managing, and regulating their collective existence in response to threats to their physical and ontological security" (ADLER & GREVE, 2009, p. 65).

The theoretical IR literature, according to Adler & Greve, by following paradigmatic divides, has tended to treat varieties of international order as mutually exclusive, generally supposing a progressive order beginning with balance of power and ending with a security community. The authors argue, instead, that security systems of governance can present a coexistence or overlap between elements of balance of power and of a security community and this overlap is a subject of research *in its own right:*

*"*This means going beyond *acknowledging* overlap in principle; it means understanding and explaining overlap and inquiring into empirical consequences for regional security governance" (ADLER & GREVE, 2009, p. 60).

Adler & Greve (2009) summarize that Realist scholars explain the system of international security governance by means of power, hegemony, empire, or some combination; Neo-liberal scholars usually refer to rationally designed functional, efficiency-building institutions; Constructivist scholars explain the evolution of systems of rule in international security as a function of the role of ideas, especially norms, and learning, socialisation, and persuasion processes; Postmodern scholars, suggest scripts of power-based discursive practices and systems emanating from power/knowledge structures, create the reality actors perceive and act upon. Adler & Greve propose then a theoretical constructivist approach "conceive the possibility that security governance empirically embodies a combination of practices, some of which are thought to be 'realist', others which are thought to be 'constructivist', etc. From this perspective, realism, for example, should not have a monopoly on conceiving power and security" (p. 65).

By proposing a multi-perspective approach, Adler & Greve emphasize that they do not suggest any new theory of regional security orders, balance of power, or security community (ADLER & GREVE, 2009, p. 83). Following the English School by taking the balance of power as an institution, the authors emphasize that actors can and do draw on practices from different mechanisms and the systemic outcomes of state interaction might not add up to a balance of power or security community system in a particular region (p. 65-66).

In *The coexistence of peace and conflict in South America: toward a new conceptualization of types of peace*, Battaglino (2012) argues that the region represents a "*hybrid*" zone of peace, challenging the *dichotomous* usual classifications "negative" and "positive" zones of peace approach. Combining elements of Realist, Neo-liberal and Constructivist perspectives, Battaglino indicates that the creation of the CDS was a regional response to a global increase in the asymmetry of distribution of military power

not only within the region but also of militarization of the agenda of security in Latin America (and in particular in the South).

Battaglino argued that the configuration in defence was shaped by changes of identity and material changes related to the militarization of security. While neo-realists propose that institutions maximize the interest of the state, the author indicate, liberals argue that institutions are a response to the need to enable the achievement of common interests, however, Battaglino emphasizes that, although both perspectives partially explain the contemporary context of international security in South America, ideational factors must be considered in the logic of identity formation that underlies the processes in region construction. According to the author, the redefinition of norms and identities by governments and civil society groups are shaped by the collective perception of identifications and meanings: the creation of CDS would be the result of a combination of material and ideational factors, revealing that, although materials factors are important in explaining regional responses to security dilemmas, they alone do not provide answers to the configuration of regional defence institutions, being necessary to analyse ideational factors, among others (BATTAGLINO, 2012, p. 83, 84)

Institutionalized cooperation has been the focus of several authors, especially in more recent years. The issue of "institutional overlap" and security governance architecture set by the various institutions and military cooperation efforts has gained attention and important authors and articles analyse this perspective in the South American context (FLEMES, NOLTE & WEHNER, 2010; WEIFFEN & VILLA, 2014; ADLER E GREVE, 2009; FLEMES & RADSECK, 2012).

Flemes & Radseck (2012) argued that different systems of "security governance" and different security practices *coexist* in the region. The authors indicate that not only there is institutional overlap, but also the practices of balancing power and participation in a security community overlap; as an example, the authors cite even internal disputes within UNASUR and the CDS, and the fact that nations in the region seek extra-regional alliances while (paradoxically) claimed that the issue and management of regional security and defence is exclusively a South American matter.

The authors propose a security governance analysis, studying the structures where multiple institutions overlap and emphasizing that the South American security agenda requires simultaneous analysis of internal crises, interstate conflicts, and transnational threats. In the authors' approach, these three groups of conflicts - although located at different systemic levels - would tend to overlap, especially in the border areas of the region:

> **"**Since neither the traditional models of power balancing and alliance building nor the security-community approach can sufficiently explain the region's security dynamics, we assume and provide evidence that different systems of security governance overlap and coexist in South America" (FLEMES & RADSECK, 2009, p. 1).

Villa & Weiffen (2014) argue that international security and defence analysis about South America must be understood considering the coexistence of a stable balance of power and practices of security community; along the search of "emerging" states to increase their regional or global roles. The creation of the UNASUR Defence Council, indicated there was a pattern suggesting the formation of a security community in the region, the authors indicate. However, there was an increase in military spending and rearmament in South American countries. The authors emphasize the growing importance of motives unrelated to external conflicts, where armaments are used to reinforce a country's international profile ("*symbolize power*"), a factor largely absent from the debate on the determinants of defence spending, in the view of the authors. Villa & Weiffen argue that the security governance in South America presents a mixture of cooperative and conflictual processes:

> (…) "security governance in the region is aptly described as a combination of balance of power and security community discourses and practices. States still see military force as a legitimate tool to influence their relations with other states in the region, while at the same time using diplomacy and cooperative institutions to maintain peace. (…) Regional and global political aspirations have surfaced as external motives in their own right, in particular for emerging powers that seek to expand their influence in the region and beyond. As a consequence of non-conflict-related

> external considerations armament is employed by South American countries as a symbol of status and a tool for insertion into the regional or global context" (VILLA & WEIFFEN, 2014, p. 139).

Villa & Weiffen emphasize that an explanatory framework for rearmament in South America loses part of the explanatory power when it focuses only on external threats or political and economic factors. The "conventional wisdom" proposed by the logic of balance of power (and influenced by Geopolitics), the authors indicate, would reveal that rearmament would be motivated by tension or conflict between neighbouring countries. However, the authors argued that rearmament in the region is not necessarily derived from perceptions of threats but rather from broad and varied factors, with increasing relevance of motives not motivated by conflict, but in the "use of weaponry as an expression of increasing power aspirations, to project and achieve greater international power" (VILLA & WEIFFEN, 2014, p. 155).

For Villani (2015), explanation of regional peace in Latin America, a complex and multifaceted phenomenon, cannot be addressed through monocausal explanations seen in most mainstream peace and war theories, suited to explain just a single aspect of regional peace in the region, the author argues. In the author's view, a comprehensive account of this process can only be achieved by the combination – or a "fusion"– of several theories of Peace and war, within a common theoretical framework (VILLANI, 2015).

These connections between theories is the proposition by Medeiros Filho (2010) in his call for "interdisciplinary and pluri-methodological character" to the analysis of international security and Defence in the region, including:

> (...) "different fields of knowledge that, despite the boundaries that make them distinct, are complementary and permeable to each other: Political Science, Sociology, International Relations Theory and Political Geography. In the field of International Relations … to adopt some ideas that, regardless of the 'label' used by its authors ('English School', 'Copenhagen School' and 'Constructivism'), seemed adequate to the South American context, like 'international

> society', 'regional security complexes', 'security community', among others"[37] (MEDEIROS FILHO, 2010, p. 17).

In the next pages we will turn to the English School to lead us to the last chapter, where we argue for an eclectic and holistic approach, agreeing with Medeiros Filho and other authors in the region, proposing:

> (...) "a 'less positivist' approach, which main task would be to test the ability of a given theory to explain the behaviour of social actors - and more 'interpretative', which purpose is to interpret the meaning that social actors attribute to their own actions"[38] (MARQUES, 2007: 25, apud MEDEIROS FILHO, 2010, p. 17).

[37] (...) diferentes campos do conhecimento: Ciência Política, Sociologia, Teoria das Relações Internacionais e Geografia Política. (…) No campo das Relações Internacionais procurou-se adotar algumas ideias que, independentemente do "rótulo" usado por seus autores (*"Escola Inglesa"*, "*Escola de Copenhagen*" e *"Construtivismo"),* parecem bastante adequadas ao contexto sul-americano, como "sociedade internacional", "complexos regionais de segurança", "comunidade de segurança", dentre outras (MEDEIROS FILHO, 2010, p. 17).

[38] (...) menos positivista – cuja tarefa principal seria testar a capacidade de uma determinada teoria para explicar o comportamento dos atores sociais – e mais 'interpretrativa', cujo objetivo é interpretar o significado que os atores sociais atribuem às suas próprias ações (MARQUES, 2007: 25, , apud MEDEIROS FILHO, 2010, p. 17).

Chapter 5

THEORIZING THE "CLASSICAL" APPROACH IN IR AND REGIONAL INTERNATIONAL SOCIETIES

INTRODUCTION

The academic discipline of International Relations (IR) is traditionally taught as a pedagogical story of 'great debates' which marked the development of this academic discipline. Currently, in the context of the fourth debate, according to Kurki and Wight (2013), the discussion focuses on the meaning of science in IR and about the divisions around which the discipline is organized: "There are many ways to characterize the 'fourth debate'; as a debate between explaining and understanding, between positivism and post positivism, or between rationalism and reflectivism" (p. 20).

The neat story of the debates and its winners is being revisited and questioned (SCHMIDT, 2013), though scientificist/positivist thinking has prevailed and became predominant (KING, KEOHANE & VERBA, 1994). With his call for a "classical approach", Hedley Bull (1966), one of the leading figures and most prominent of scholars of the English School, was also central in the so-called "second debate" of the discipline. This debate was prompted, Kurki & Wight (2013) indicate, "by the behaviourists and their predominantly quantitative research (mostly positivists), which elicited fierce resistance from those committed to a more historicist, or interpretive, form of IR" (p. 18).

In this chapter, we summarize some of the issues of these debates and the main divisions within mainstream International Relations research traditions (or the "isms", as they are sometimes called). This is important to contextualize the position of the English School in its standing as a *via media*; its call for plurality, interdisciplinarity and multiplicity of methodology.

"Those who identify with the English School see it as occupying the middle ground in IR", according to Dunne (2013). As most of the main authors of the ES, this

middle ground is considered “a preferable location in relation to the dominant mainstream theories (neorealism and neoliberalism) and the more radical alternatives (such as critical theory and poststructuralism)” (DUNNE, 2013, p. 133) .

In the view of Dunne, most scholars are drawn to English School perspective because it offers a synthesis of different theories and concepts. Dunne points out that, in doing so, the English School “avoids the either/or framing of realism vs. idealism, as set out in the writings of many great figures during the 1930s and 1940s” (p. 133). Most importantly, in the assessment of the author, this positioning also helps to avoid “the explanatory (*versus*) interpretive dichotomy which generated so much heat during the ‘fourth debate’ in the 1990s. In place of these dichotomies, the English school purports to offer an account of IR which combines theory *and* history, morality *and* power, agency *and* structure” (DUNNE, 2013, p. 133).

“What differentiates the English School from other approaches”, as Dunne and Little (2014) points out, is that “it analyses the historical elements along the systemic logic, attempting to accommodate societal norms in theoretical accounts of world politics, as only these analytics *together* have explanatory power in considering how the world hangs together” (DUNNE & LITTLE, 2014, p. 91).

In both its comparative and developmental historical work, according to Buzan (2014), the English School prioritizes the search for general patterns and making structural comparisons across space and time, and, more than this, “it is more interested in analysing the social dynamics: the ideational forces, the rules of conduct, the intentionality of the actors, and the normative tensions and problems generated by the interplay of these factors” (BUZAN, 2014, p. 22).

Buzan stresses that, whereas material causality is appropriate to the study of *systems*, societies could only be understood through the consciousness and moral character of the actors within them: “Not until the rise of constructivism to respectability in American IR made intersubjective understanding fashionable, and stood mutual constitution against cause–effect logic, did the English School and its approach achieve real recognition in the US as a respectable approach to the subject” (BUZAN, 2014, p. 22).

The English School, in the view of Dunne (2013), is potentially more illuminating than mainstream alternatives "(...) because it seeks to provide a synthetic account of global politics that avoids the series of false dichotomies thrown up by the alternatives such as power vs. norms, materialism vs. idealism, anarchy vs. hierarchy, reasons vs. causes" (DUNNE, 2013, p. 138).

In this chapter, our starting point is the discussion on the meaning of Science in IR; the differences between "explaining" and "understanding" and the schism between Positivism and Interpretivism; methodology and the English School approach.

The English School retained its potential for synthesizing grand theory, Buzan (2014) stresses, by the rebuttal of the argument about incommensurability between paradigms that separated Liberal, Realist and Marxian approaches to IR. Thus, "the English School's holistic approach to knowledge creation contrasts with the 'fragmented' approach dominant in the US" (BUZAN, 2014, p. 23).

Since one of the pillars of the English School is its emphasis on History, we analyse some of the aspects of this approximation and the interpretation of the central authors of the School on the uses and meaning of History in IR. The chapter follows identifying the main aspects in which the English School differs but also approximates to the mainstream theories of IR, namely Realism, Liberalism and Constructivism.

We present the core concepts of the English School approach, especially that of International Society, followed by the interpretation of the ES approach in Regional Contexts, its application to South America, and finalize with ES approach to International Security.

INTERNATIONAL RELATIONS AND SCIENCE: POSITIVISM AND INTERPRETIVISM

The academic field of International Relations is largely located within the area of Social Sciences. However, as Kurki and Wight (2013) emphasize, a position on whether IR is considered a science can only be taken on the adopted perspective and definition

of what science is. The authors consider IR a Science, “not based on a dogmatic insistence on the certainty of its claims but, rather, on its commitment to constant critique” (KURKI & WIGHT, 2013, p. 15, 16).

The influence of positivism as a philosophy of Science, according to Kurki and Wight, “has shaped how we theorize about IR, what counts as a valid question, and what is regarded as solid of evidence and knowledge” (p. 15). Positivist is so influential in the discipline “that even those concerned to reject a scientific approach to IR tend to do so on the basis of a general acceptance of the positivist model of Science” (KURKI & WIGHT, 2013, p. 15).

Although positivism has been discredited as a valid account of scientific practice, Kurki and Wight add that works in this tradition have made some of the most important and lasting contributions to the discipline: “Nonetheless, this view of science is highly contested and there is no reason to insist that all research should fit this model. Equally, a rejection of the positivist model of science need not lead to the rejection of Science” (KURKI & WIGHT, 2013, p. 15).

In theoretical terms, when it comes to characterize the English School as a “research program” and its contributions, it is important to clarify the definition of what “theory” means. Here, as Buzan (2014) explains, the definition of the term ‘theory’, is more European, meaning “(...) anything that organizes a field systematically, structures questions and establishes a coherent and rigorous set of interrelated concepts and categories” (BUZAN, 2014, p. 24).

Buzan stresses that the American approach to IR demands that a theory strictly *explains* and must contain – or is able to generate – testable hypotheses of a causal nature. For Buzan, the English School theory clearly qualifies on the first (European) account but mainly not on the second: “Given its necessary theoretical and methodological eclecticism, the English School cannot meet a requirement of theory that is linked to a single epistemology” (BUZAN, 2014, p. 24)

Another important author of the English School, Suganami (2005) describes 'theory' as meaning “something quite broad such as a systematic representation of the

world that gives us some coherent understanding of it (and thereby perhaps also a set of guidelines as to how to deal with it)" (SUGANAMI, 2005, p. 34)

EXPLAINING AND UNDERSTANDING

The debates between explaining and understanding and rationalism and reflectivism, in the view of Kurki and Wight (2013), have produced a division of the discipline of International Relations in two groups: a 'pro-science' viewpoint versus an 'anti-science' position (p. 24). The authors indicate that the terms 'explaining' and 'understanding' come from Max Weber's distinction between *Erklären* and *Verstehen* and were popularized by the book *Understanding and Explaining in International Relations,* by Hollis and Smith (1990).

According to Kurki and Wight (2013), this schism in IR can be described is in terms of a scientific approach versus an interpretive or hermeneutic approach: "*explanatory* theorists seek to emulate the natural sciences in following scientific methods and in seeking to identify general causes, while advocates of *understanding* focus on the analysis of the 'internal' meanings, reasons, and beliefs actors hold and act in reference to" (p. 20). Explanatory theory, the authors indicate, "emphasizes observation as the only way of generating valid knowledge, whereas the understanding side of the debate concentrates attention on the interpretation of unobservable, and immeasurable, contexts of action" (KURKI & WIGHT, 2013, p. 21).

"For the advocates of understanding", Kurki and Wight (2013) explain, "social meanings, language and beliefs constitute the most important (ontological) aspects of social existence" (p. 20). The authors add that, explanatory theorists, however, do not incorporate these elements into a scientific framework of analysis, since scientific knowledge requires empirical justification and meanings, beliefs, and ideas are not susceptible to validation by such techniques: "Advocates of an interpretive approach, on the other hand, argue that we should be guided in our analytical procedures by the most important factors impacting on human behaviour (beliefs, ideas, meanings,

reasons), not by an a priori commitment to something called Science" (KURKI & WIGHT, 2013, p. 20).

However, Kurki and Wight stress that it is possible to accept the validity of empirical data without adopting a positivist account of Science: "As an epistemology, the empiricist approach to the acquisition of knowledge is premised on the belief that the only genuine knowledge we can have of the world is based on those 'facts' that can be experienced by the human senses" (KURKI & WIGHT, 2013, p. 22).

The English School, by seeking to clarify the concepts which reveal patterns in world history, works with a very different notion of 'theory' to that found in the dominant American approaches, in the view of Dunne (2013): "Rather than 'operationalizing' concepts and formulating 'testable' hypotheses, the emphasis upon contending concepts is driven by a search for defining properties which mark the boundaries of different historical and normative orders" (DUNNE, 2013, p. 138)

THE SECOND DEBATE IN IR

The so-called Second Debate in IR was largely staged by one of the most important authors of the English School, Hedley Bull. In 1966, Bull wrote a paper in *World Politics* called '*The case for a classical approach',* positionning himself *against* a rigid application of scientific methods and calls for the adoption of a classical approach, which Bulls defined as "that approach to theorizing that derives from philosophy, history and law, and that is characterized by explicit reliance upon the exercise of judgement" (BULL, 1966, p. 361).

As Curtis & Koivisto (2016) indicate,

> "(..) behaviourists like Kaplan (1966) advocated statistical modelling and other quantitative methods to uncover causal laws (or regularities) of international relations and, in response, Bull argued that the 'scientific' approach could not advance international theory because scholars are imbued with value assumptions. Instead,

> international theory should uncover the ideas that govern our thinking about international relations and 'to expound what those ideas are', place them 'to their historical context, and to examine their validity and significance in past and to present practice' " (CURTIS & KOIVISTO, 2010, p. 435).

Dunne (2013) emphasizes that, "for Bull, IR was about establishing a body of general propositions about 'the global political system' by which he meant states and also regions, institutions, individuals, and other organizations and the patterns generated by their interactions" (p. 135). The role of IR theory was to define concepts and theorize relations between them: "Such an interpretive understanding of theory is at odds with the positivist pursuit of the formulation of 'testable hypotheses'" (DUNNE, 2013, p. 135).

In the view of Zhang (2014),

> The vigorous defence of a classical approach mounted by Hedley Bull (1966) in his exchange with Morton Kaplan (1966) was "the defining moment of the so-called second great debate between behaviorists and traditionalists in IR and helped the diffusion and dissemination of the ES ideas beyond British studies of IR", which for Zhang traces back to the influence of authors such as E.H. Carr in shaping the early development of the discipline (p. 224). This enduring epistemological divide was described by Lake (2011) as that between "nomological and narrative forms of explanation" (ZHANG, 2014, p. 224).

The Second Debate in the historiography of the field of IR, according to Curtis and Koivisto (2010), focused upon the relative merits of scientific and historical methods – which were interpreted as two separate and incommensurable approaches – for understanding international politics. However, the authors underscore that the incommensurability of science and history suggested by this debate rests upon a particular understanding of each: both sides accepted that an empiricist philosophy of science and a positivist methodology were representative of scientific inquiry in IR, juxtaposed with a historicist and interpretivist approach, closing off many possibilities for extending the debate (CURTIS & KOIVISTO, 2010, p. 433). "Because of this dichotomy, IR scholars separated the discipline into two distinct pathways for decades, which, in the view of the authors, is unnecessary and ignores alternative paths for

conceptualising the relationship between History and Science" (CURTIS & KOIVISTO, 2010, p. 437).

The Second Debate and the disciplinary divide that it fostered in IR, in the view of Curtis and Koivisto (2010), has had the effect of reifying the division, often represented by a choice between taking a scientific, "nomothetic" approach - discovering or studying general scientific laws; or a historical, "idiographic", approach of the social world - studying particular facts or processes; developing universally applicable general laws, through a type of grand theory, or seeking to understand particular, unique historical events. However, the authors underscore that these are two extreme positions that are not as exclusive it appears: "The question is whether we are interested in understanding the distinctive contribution of particular events and processes, or in developing ahistorical laws that are universally applicable to all epochs of human history" (CURTIS & KOIVISTO, 2010, p. 437).

In *Interpreting the English School: History, Science and Philosophy*, Mark Bevir and Ian Hall emphasize that"interpretivists should not dismiss the methods of data-collection or analysis because, in the view of these authors, "many of them are sophisticated and powerful"; however, the authors emphasize that "interpretivists are historicists, with a strong view of human agency, and they do not hold that the social world is akin to the natural world, arguing that explaining social action involves discussion of the meaning of that action for agents, therefore gravitating to other methods" (BEVIR & HALL, 2020).

In the text *Against Epistemological Absolutism: Towards a 'Pragmatic' Center?*, Rudra Sil (2000) proposes that there is no need for radicalism, and in the author's own words, "(...) it is possible to simultaneously embrace an empirically - or historically - grounded approach to theory building and recognize the potential value of deductively-driven general theory as long as we refrain from making indefensible claims about the temporal and logical primacy of the latter" (SIL, 2000).

In his article *Why 'isms' Are Evil: Theory, Epistemology, and Academic Sects as Impediments to Understanding and Progress*, David A. Lake (2011) stresses that the area of IR is fragmented along "sectarian" line, between realism, liberalism, neorealism,

neoliberalism, and the English School among others: “We organize ourselves into academic ‘sects’ that engage in self-affirming research and then wage theological debates between academic religions” (p. 465). In his view, International studies deals with the “largest and most complicated social system possible”, far from a grand unified field theory, continuing to have many different partial theories that provide insight into limited pieces of the puzzle of world politics: “As scholars, we should accept these limits with humility and grace and, indeed, embrace partiality” (LAKE, 2011, p. 467).

ENGLISH SCHOOL AND METHODOLOGY

The English School embraces a pluralistic approach to methodology. As Little (2005) explains, at “the heart of this assessment lies the recognition that there is a need for a much richer and more complex theoretical framework for understanding international relations than mainstream approaches usually deploy” (p. 47).

Following Richard Little proposition that international system, society, and world society — the central concepts in English School thought — compose different social realities or ‘structures’, which exist in a dynamic relationship with one another and require incorporation into the consideration of conduct its participants, Navari (2009) argues that the English School approaches are concerned with rules of conduct and must focus on agents: “Unlike ‘behaviour’, rules of conduct must be consciously apprehended by the subject” (p. 4).

In terms of the distinction between causes and intentions, according to Navari (2009), the English School theory favour intentional forms of explanation at least so far as a society of states is concerned: “As opposed to a system, which may be driven mechanistically, a society constituted by rules must be produced by rational subjects with intentions. Accordingly, causal analysis does not have much purchase for English School scholars” (NAVARI, 2009, p. 4).

Methodological pluralism, in the view of Little (2009), “is inherent in the ES’s theoretical approach and follows from the commitment to a multidimensional theoretical framework as well as a multifaceted theory of history” (p. 79). Little points out that “neorealism and neoliberalism are both characterised by essentially one-dimensional theoretical perspectives that are ahistorical in character, while the ES seeks to develop a historically sensitive and comprehensive/general theory of IR, which requires an eclectic or pluralistic approach to methodology” (LITTLE, 2009, p. 79)

The concept of international society, according to Navari (2009), “encapsulates the central insight of the English School that international relations constitute a set of *social* relationships” (p. 5). The author agrees with Edward Keene (2009) that the concept is an ideal type, in the Weberian sense. For Weber, ideal types are explanatory devices which try to unpack the motives for action in studying societies, to ‘measure’ some actually existing reality. Navari points out that this reality is constituted by, among other things, rules of conduct, or ‘norms’ in some modern usages, and do not ‘cause’ things to occur,

> (...) “because in logical terms, they do not exist before being demonstrated in action: “They cannot be construed as causes because, in a causal relationship, causes must come *before* effects, whereas rules of conduct can only be demonstrated in their effects. In the language of cause and effect, they are *effects*; they are not causes” (NAVARI, 2009, p. 5, 6).

In the view of Suganami (2005), leading English School scholars’ main interests lie in *Verstehen,* which he describes as an explanation of what goes on in the world “by penetrating the minds of the key actors and uncovering not only their motives but also the common premises and presuppositions that prevail among them about the nature of the game they are supposed to be playing" (SUGANAMI, 2005, p. 33).

Methodologically, English School theorists are ‘state-centric’ in the loose meaning of the term, according to Navari. Although they share this with Realist scholars, there are critical differences between them, with important methodological implications, in the view of Navari. The author emphasizes that the English School

primarily treats the state as a setting or structure, whereas traditional Realists tend to treat it as an actor (NAVARI, 2009, p. 8, 9).

"The concept of "Power" also holds an important part in English School explanations, but not as an independent variable", Navari (2009, p. 8) explains. The author cites Herbert Butterfield`s distinction between balance of power as a conscious device used by statesman and balance of power as an objective feature of political reality: "The first is a theory concerning proper action, to guide or not to guide policy according to the understanding of the states persons at the time. The second is a calculus that seeks to expose the configurations of an objective reality" (p. 8, 9).

Barry Buzan attempts to build bridges between the systemic perspective developed by the neorealists and the societal perspective of the English School, in the view of Little (2009). What distinguishes international society from a system is a sense of common identity; an international system develops into an international society, therefore, when this sense of common identity is made manifest (LITTLE, 2005, p.49).

The methodology proposed by Buzan and the positivists of the "new ES", in the view of Costa-Buranellli (2014) is a form of *analyticism.* Costa-Buranelli argues that more than establishing a causal relation between variables linked by a cause-efficient mechanism, or proposing nomothetic generalisations, "analyticism assumes that the reality is investigated through a set of predetermined analytical elements that function as a model for what we find in the real world, something akin to a Weberian ideal type" (COSTA-BURANELLI, 2014, p. 34).

Even with calls to methodological pluralism and eclecticism, scholars within or related to the English School are "deeply sceptical about scientism in international relations", stresses Bellamy (2005), and usually prefer *an interpretive approach,* using a variety of methods drawn from historical, legal, and diplomatic studies (BELLAMY, 2005, p. 5).

ENGLISH SCHOOL AND HISTORY

"History became part of the 'tug of war' between "classical" approaches and IR's neo-positivist 'laboriticians'", according to George Lawson (2010), who wonders if this is an "eternal divide" (p. 207). The author sees the late return of classical realism, the rise of neoclassical realism and constructivism, more than a historical turn, as an "acceleration and deepening of trends already present in the discipline" (2010, p. 207). "The English School, it can be argued, has the most intimate association with history of any of the major approaches to international relations", according to Lawson (2010).

The presence of several influential historians in the British Committee, which, along the group at the London School of Economics (LSE), was the base of what became to be known as the English School, ensured that a historic orientation would be prominent in its attempt to understand and develop the concept of international society, as Buzan (2014) recalls. Buzan emphasizes that History is fundamental and necessary to understand International Relations, giving a perspective to "informed speculation about present and future events and processes and roles" (BUZAN, 2014, p. 43). In fact, history was a "hallmark of research" of the British Committee, in the early years what was to become known as the English School, according to Viggezzi (2005, p. X).

For Little (2005), History is fundamental because the English School is associated with the idea that we can characterize international relations in terms of an international society constituted by norms that are considered to be very durable and highly institutionalized (LITTLE, 2005, P. 62, 63).

The relationship of the English School with History is well established in the literature about the "emergence" and the "expansion" of international society. Buzan (2014) summarizes the themes and issues first raised by Bull in the pattern of the classical expansion story, in his own words, as the following points:

- "the emergence and consolidation of a distinctive anarchical international society in Europe built around the Westphalian institutions of sovereignty/non-intervention, territoriality, the balance of power, war, international law, diplomacy and great power management;
- the transfer of this society to the rest of the world on the back of expanding European economic and military power, mainly in colonial form but also in encounters with non-Western societies that escaped colonization;
- decolonization, the bringing in of the Third World to equal membership of global international society, and the subsequent problems. This is presented mainly as a historical story of what happened and with what consequences, rather than as an attempt to explain why expansion occurred" (BUZAN, 2014, p. 62).

Buzan acknowledges that the "emergence story" has been questioned mainly on the grounds that the classical story is Eurocentric, pointing out that European international society did not emerge fully formed in Europe and then spread from there to the rest of the world, but rather, it developed as was shaped as much by the encounter as was the non-European world (BUZAN, 2014, p. 70). The author points out that "the expansion/evolution story about international society (WATSON, 1992) explains what the international order is, how it came to be, and why resistance to and defence of it take the forms and have the intensities that they do" (BUZAN, 2014, p. 76, 77).

"International societies/systems tend to be predicated on historically contingent values and interests rather than the immutable global forces intimated by neorealists and neoliberals", emphasizes Bellamy (2005). The author considers that the English School has a unique place to think about world history because "the pluralistic approach can accommodate different standpoints over the *longue durée* and because, since its inception, the English School has emphasized the importance of locating contemporary international society within a proper historical context" (BELLAMY, 2005, p. 13, 14)

"Theorizing causes", as Navari (2009) points out, "demands theorizing context, as well as the relationship of action to context" (p. 212). The author explains that the

comparative historical method allows the analyst to isolate the factors relevant in shaping particular historical state systems at different periods; some others (exemplified by Bain, 2009) use 'history' to allow the identification, and comprehension of practice; and finally, others (as in Oakeshott, 2009, interpretation) propose that history writing arises from present concerns, which orient the historian to his subject matter and the past to throw light on present concerns (NAVARI, 2009, p. 10, 11).

The relationship between historical knowledge and IR to make sense of contemporary world politics is a complex one, in the view of Suganami (2014). The author summarizes a wide variety of views of the English School authors on this issue, in the following points:

- Atemporal approaches to the study of IR are considered inadequate, since its subject is intrinsically historical;
- In any empirical study of IR an idiographic dimension cannot be neglected;
- It is possible to search for historical generalizations, bearing in mind that there may be differences, as well as similarities, in the cases compared;
- Historical knowledge helps us decipher the direction of human social development. However, historical knowledge not only enables but also constrains our speculations about future options;
- In our thinking about IR, we should be aware that our ideas about IR may be historically bound;
- Historical narratives about world politics are intertwined with the theories (or interpretations) about the fundamental characteristics of world politics (SUGANAMI, 2014, p. 19)

ES AND REALISM, LIBERALISM, CONSTRUCTIVISM

The English School positions itself as a *via media* between the mainstream approaches of IR. In the view of Buzan, the ES overlaps in many aspects with Realism, Liberalism, Constructivism and other approaches to IR and this holism and

methodological eclecticism position it to integrate the discipline, more than to add to the differentiations that tend to divide it (BUZAN, 2014, p, 37).

This capacity of the English School to connect with most of the main branches of IR theory, according to Buzan, "is a reflection of its holistic approach stemming back to Wight's three traditions" (p. 37). These three traditions, as described by Wight (1977), are Realism (Hobbesian), Rationalism (Grotian) and Revolutionism (Kantian). Buzan points out that the English School does not see each of these traditions as being somehow mutually exclusive and stresses that the ES approach is holistic because it takes a wide range of variables into account, which also explains both its theoretical and methodological eclecticism (BUZAN, 2014, p. 37). However, Buzan also indicates that "the English School's picture of international relations is both more complicated and less determinate" (p. 26), as the author continues:

> "Like that of realists and liberals, it starts with the state but, through its concepts of international and world society, primary institutions, and *raison de système*, it has a deeper and more social vision of international order than either. The idea of primary institutions makes it considerably more than just a via media between them. Because international societies can come in a great variety of forms, the English School can offer various visions of the future and contains no teleological assumptions about how things will unfold" (BUZAN, 2014, P. 26).

The English School can be positioned, in the view of Buzan (2014), in the following aspects in relation to other mainstream IR theories:

- **Realism:**

The main difference is between system and society, since for the English School international society stresses the *social* aspects against the more mechanical idea of international system proposed by realists. Also, ES shares its state-centrism with realists, but the concept of Power is not a dominant feature for ES as it is for Realism. Realists see states as given and anarchy as an essentially material condition which leads to the

balance of power; instead, for the English School states and anarchy are social constructions which can lead to a variety of processes.

However, Buzan emphasizes that there are more similarities between classical realism and the English School, and the differences are more obvious in relation to neorealism (p. 25, 27). The English School and Realism differ in some quite basic issues, in the view of Buzan, in that

> "Realists take the international system as their main, perhaps only, object of study, whereas for the English School the international system is just one of the things taken into account, with the main focus being on international society. International systems are amenable to positivist approaches and mechanistic theories, whereas international societies lend themselves more to historical, legal and constructivist approaches. Realists abstract themselves out of history by assuming both the permanent domination of power and survival motives and the timeless universality of anarchic structure and the balance of power as a 'hidden hand' mechanism. By contrast, the English School is always concerned about historical contingency and has a wider vision of both state motivations (which includes the realist one) and international system structures. Where it comes closest to realism is in its primary institutions of the balance of power and great power management. Yet, for the English School, the balance of power is a social contract, not a mechanistic property of the system, which is a profoundly different understanding" (BUZAN, 2014, p. 29).

- **Liberalism:**

Buzan sees a close approximation between the English School and regime theory, but indicates that Liberalism is more focused on civil society, NGOs and other non-state institutions, while the ES focuses mainly on the state and primary institutions (BUZAN, 2014, p. 30)

There is an overlap and "significant complementarity" linking the English School and liberalism, particularly in regime theory, in the view of Buzan. But the author points out that there are also significant differences:

- “Regime theory is focused more on contemporary events, while the English School has a mainly historical perspective;

- Regime theory is concerned primarily with particular human constructed arrangements, formally or informally organised, whereas the English School is concerned primarily with ‘historically constructed normative structures’;

- The English School has placed a lot of emphasis on the way in which the institutions of international society and its members are mutually constitutive. For the English School the primary institutions define both the rules of the game and what the pieces are. Buzan adds that this difference is complemented and reinforced by the methods used by these approaches, with regime theory largely linked to rational choice and the English School anchored on history, normative political theory and international legal theory;

- Regime theory and its analysis rests in terms of actors pursuing self-interest and utilizing mechanisms of rational choice, while the English School focuses mainly on common interests and shared values among actors and the mechanisms of international order” (BUZAN, 2014, p. 30).

- **Constructivism:**

For Buzan, “any study of society is necessarily constructivist in some central way, because society cannot be understood as anything other than a social construction” (p. 32). In that sense, the author agrees with Dunne (2012) in the sense that “the English School was ‘constructivist’ before constructivism became mainstream”. (BUZAN, 2014, p. 32).

Buzan stresses that The English School has its main roots in the study of history, political theory and international law, whereas constructivism grew out of debates about epistemology and method. He cites authors such as Suganami, who perceives many parallels between the English School and Wendt’s constructivism, including state-centrism, a bottom-up theory of society and a macro-sociological approach; but he sees differences most starkly both in the historicism of the English School versus Wendt’s ahistoricism and in the different conceptions of anarchy (BUZAN, 2014, p. 33).

ES CORE CONCEPTS

The main concept of the English School and distinguishing marker in the realm of International Relations is that of “international society”. In the view of Green (2014), “the international society is conceived as society in which states are the primary actors, collectively producing the rules and accepted practices by which they manage their interrelations, and their action reflects the ideas, cultural contexts, identities, and shared understandings of individual and state actors” (p. 1).

> The theoretical foundations of the English School and the concept of international society synthesizes and reflects the thought of major European authors in the notion of the three “worlds” of IR (international system/Hobbes, international society/Grotius, and world society/Kant), and the main “institutions” which structure and order the international realm (diplomacy, the balance of power, international law, major powers, war, and others), and ways of discussing the degree of cultural convergence within them (GREEN, 2014, p. 1).

English School is a “poor fit for what it represents”, tells us Buzan (2014). The author points out that some of its founding figures were not English – Hedley Bull was Australian, Charles Manning, South African – and its focus has always been on history and theory for the global level of international relations. There is nothing particularly English about its ideas, Buzan adds, which might be understood as an European amalgam of history, law, sociology and political theory; Grotius, a key classical theorist with whom the English School is most closely associated, is a Dutchman; and the ES was initially funded by American foundations such as Rockefeller and Ford (BUZAN, 2014, p. 5).

The English School, according to Suganami (2005) is “a historically constituted and evolving cluster of scholars with a number of plausible and interrelated stories to tell about them” (p. 30). The author stresses that this is an evolving cluster of mainly UK-based contributors to international relations, who broadly agree in treating the international society perspective — or 'rationalism' in Wight's sense — as a particularly important way to interpret world politics and intellectual disposition with close

professional connections, “similar to a club or a network due the participants personal connections and similar concerns” (SUGANAMI, 2005, p. 30).

Summarizing the conception of IR to the English School, Barry Buzan (2014) sees IR “(..) as a world not merely of power or prudence or wealth or capability or domination but also one of recognition, association, membership, equality, equity, legitimate interests, rights, reciprocity, customs and conventions, agreements and disagreements, disputes, offenses, injuries, damages, reparations, and the rest” (BUZAN, 2014, p. 5).

In the twenty-first century, the English School both consolidated itself and “the long-neglected subject of international society at the regional level” began to receive attention, according to Buzan, attracting scholar Asia, particularly in China and Japan. Buzan stresses that ES resonates with historical approaches to IR and also “serves as an antidote to what some see as the excessive influence of American IR theory in their universities” (2014, p. 11). The English School in these contexts is taken as justification for developing more national approaches to IR theory (BUZAN, 2014, p. 11).

The classical English School posits a theoretical, and historical, framework, summarizes Halliday (2009), combining elements of classical realism (such emphasis on military power and competition, the primacy of the state, the role of great powers, and the interstate function of wars), with themes associated with a ‘liberal’ or ‘Grotian’ approach to international relations (such as the acceptance of shared values of a formal, legal, and informal, ‘institutional’ character). “The English School combines recognition of the self-interest and structurally intrinsic competitiveness, which is present in the international system, with an insistence on the other factors, be they customary, legal or ideological, which mitigate and to some degree shape such relations” (HALLIDAY, 2009, p. 2, 3).

The three traditions idea, is summarized by Buzan (2014), in his own words, in the following terms:

- “*International system* (Hobbes /Machiavelli/ realism) is about power politics among states and puts the structure and process of international anarchy at the centre of IR theory. This position

> is broadly parallel to mainstream realism and neorealism and is thus well developed and clearly understood outside the English School. It is based on an ontology of states and is generally approached with a positivist epistemology, materialist and rationalist methodologies, and structural theories.
> - *International society* (Grotius/rationalism), or sometimes *states-system*, or *interstate society*, or *society of states*, is about the institutionalization of mutual interest and identity among states and puts the creation and maintenance of shared norms, rules and institutions at the centre of IR theory. The basic idea of international society is quite simple: just as human beings as individuals live in societies which they both shape and are shaped by, so also states live in an international society which they shape and are shaped by. Wight (1991: 137) nicely captures it with the idea that international society is a social contract among societies themselves each constituted by their own social contract.2 But because states are very different entities from individual human beings, this international society is *not* analogous to domestic society.
> - *World society* (Kant/revolutionism) takes individuals, non-state organizations and ultimately the global population as a whole as the focus of global societal identities and arrangements and puts transcendence of the state system at the centre of IR theory. Revolutionism is mostly about forms of universalist cosmopolitanism" (BUZAN, 2014, p. 12).

In the view of Buzan, in the English School perspective all these three elements are in continuous coexistence and interplay, with the "main question at any given time and place being how strong they are in relation to each other" (BUZAN, 2014, p. 14, 15).

The English School approach to IR is making a significant impact in continental Europe as well as in the USA, Canada, Australia, China and India, adds Dunne (2013). In Britain, the ES has once more become the dominant theoretical voice, according to the author. In that sense, "contrary to what is implied by the name, the English school was never very English and is even less so today" (DUNNE, 2013, p. 133)

INTERNATIONAL SOCIETY: DEFINITION, PROPERTIES

One of the main concepts of the English School approach is that of “international society”. In the words of Hedley Bull, international society comes into being when “a group of states, conscious of certain common interests and common values, forms a society in the sense that they conceive themselves to be bound by a common set of rules in their relations with one another, and share in the working of common institutions” (BULL, 1977, p. 13).

The first key element of international society, in the words of Dunne (2013), is that membership is confined to sovereign states, where actors both claim sovereignty and recognize one another’s right to the same prerogatives. The author stresses that the act of mutual recognition indicates the presence of a social practice; this recognition is the first step in the construction of an international society (DUNNE, 2013, p. 139). However, as Dunne adds, recognition is not a sufficient condition for the existence of an international society; the actors must have some minimal common interests such as trade, freedom of travel, or simply the need for stability (p. 140).

International society should be thought of in ontological terms (as a social structure) and agential terms (a capacity for action), in the view of Dunne (2005). The structural terms refers to powers, tendencies, properties and rules, that take the form of enablement and constraints on action; agency captures the way in which representatives of 'international society' have clarified and codified rules about diplomatic immunity, the laws of war, principles of coexistence following a breakdown in order, and so on. (DUNNE, 2005, p. 68, 69) “International society is a social fact, one that is external to each state but also internal to all” (DUNNE, 2005, p. 69).

In Wight’s (2002, 140, 141) authoritative words:

> “There are several kinds of arguments to show that international society is indeed a society; one of the most important is the existence of international institutions. It is clear that where there is law, there is society; similarly, where there are institutions, there is a society. ‘Institutions’ here does not mean determinate organizations housed in determinate buildings, such as the League

> of Nations in the Palais des Nations, or the United Nations in the East River building; but rather what historians and sociologists mean: 'Recognized and established usages governing the relations between individuals or groups'; for example, 'property', or 'marriage'. An institution in this sense is 'an enduring complex, integrated, organized behaviour pattern through which social control is exerted and by means of which the fundamental social desires or needs are met" (WIGHT, 2002, p. 140, 141).

The arguments of classical Hedley Bull's text *The Anarchical Society (1977),* are summarized as follow, in the words of Suganami (2005)*:*

- "Security against violence, observance of agreements, and stability of property, private or public—or life, truth, and property'—are the three elementary, primary, and universal goals of social life (Bull 1977: 5). A society cannot be said to be orderly, or even to exist, if these goals are not met to some extent; and order is a pattern of activity that sustains such goals (Bull 1977: 4—5).
- Order is not the only goal that is important; justice is also important. However, *The Anarchical Society* is dedicated to analysing how order is sustained in contemporary world politics through the workings of international society (Bull 1977: pp. xii-xiii).
- As for international order, or order in international society, six elementary and primary goals are discernible, which have been pursued in modern international society especially by its leading members: (a) the preservation of the system or society of states itself against the challenges to create a universal empire or challenges by supra-, sub-, and trans-state actors to undermine the position of sovereign states as the principal actors in world politics; (*b)* the maintenance of the Independence or external sovereignty of individual states; *(c)* peace in the sense of the absence of war among member states of international society as the normal condition of their relationship, to be breached only in special circumstances and according to principles that are generally accepted; *(d)* limitation of interstate violence; and *(e)* observance of international agreements; (/) the stability of what belongs to each state's sovereign jurisdiction (Bull 1977: 16-20).

- These goals are sustained, and a degree of order is achieved, by a combination of rules and institutions that have evolved in modern international society. The former are of three types: (a) 'the fundamental or constitutional normative principle of world polities' in the modern era; *(b)* 'the rules of coexistence'; and *(c)* 'the rules concerned to regulate cooperation among states—whether on a universal or on a more limited scale' (Bull 1977: 67-70). The latter includes the sovereign states (Bull 1977: 71-3) and the five other institutions of modern international society: the balance of power, international law, diplomacy, war, and the concert of great powers (Bull 1977: chs. 5-9)". (SUGANAMI, 2005, p. 35)

Although Bull's overall concern in *The Anarchical Society* was the problem of order in international relations, Shouenborg (2014) synthesizes that the substance of the discussion is about the workings of five institutions: (i) the balance of power, (ii) international law, (iii) diplomacy, (vi) war, and (v) the great powers (SHOUENBORG, 2014, p. 77).

Some authors make the argument that the English School is primarily concerned with the study of institutions, and in fact, Suganami (2003) has called them "(...) 'institutionalists' in view of their interest in identifying, and investigating the workings of, the institutions of international society, or a cluster of social rules, conventions, and practices that provide its members with a framework for identifying what is the done thing and what is not in the day-to-day management of their interactions" (p. 253).

Barry Buzan (2009) makes a particular distinction between primary and secondary institutions, to the study international societies, according to Navari (2009): primary institutions represent fundamental underlying norms, and are more evolved than designed, such as sovereignty, diplomacy, and international law; secondary institutions, by contrast, are relatively specific, concrete, and are usually designed (mainly intergovernmental organizations and regimes). Buzan suggests that the nature and complexity of their primary and secondary institutions is what characterizes and identifies historical state systems; this focus on institutions also permits the identification of regional state systems (NAVARI, 2009, p. 16).

In Buzan's own definition,

- "*Primary and secondary institutions* This usage is also not (yet) well established, even though the understanding it represents is deeply implicit in the whole idea of international society. It relates to the common usage of 'institution', which can be understood either in quite specific terms, as 'an organisation or establishment founded for a specific purpose', or in more general ones, as 'an established custom, law, or relationship in a society or community'.
- *Primary institutions* are those talked about by the English School and reflect the second usage of 'institution' above. They are deep and relatively durable social practices in the sense of being evolved more than designed. These practices must not only be shared among the members of international society but also be seen among them as legitimate behaviour. Primary institutions are thus about the shared identity of the members of international society. They are constitutive of both states and international society, in that they define not only the basic character of states but also their patterns of legitimate behaviour in relation to each other, as well as the criteria for membership of international society. The classical 'Westphalian' set consists of sovereignty, territoriality, the balance of power, war, diplomacy, international law and great power management, to which could be added nationalism, human equality and, more recently and controversially, the market. But primary institutions can be found across history wherever states have formed an international society.
- *Secondary institutions* are those talked about in regime theory and by liberal institutionalists and relate to the organizational usage of the term. They are the products of a certain types of international society (most obviously liberal, but possibly other types as well) and are for the most part intergovernmental arrangements consciously designed by states to serve specific functional purposes. They include the United Nations, the World Bank, the World Trade Organization and the nuclear non-proliferation regime. Secondary institutions are a relatively recent invention, first appearing as part of industrial modernity in the later decades of the nineteenth century" (BUZAN, 2014, P. 16 E 17)

Buzan adds that primary institutions are differentiated from secondary ones by being deeper and more evolved, and by having a much longer history and offer a way of seeing international society as a form of social structure (BUZAN, 2014, p. 78, 79).

However, Buzan emphasizes that classical English School literature is unclear about defining primary institutions and cites Holsti (2004: 18, 24) as providing an operational definition and criteria for identifying primary institutions:

- existence of patterned, recurrent practices;
- existence of coherent sets of ideas/beliefs that frame these practices and make them purposive;
- presence of norms, rules and etiquettes that both prescribe and proscribe legitimate behaviour.

However, Buzan proposes a more general definition:

- they are relatively fundamental and durable practices that are evolved more than designed; and
- they are constitutive of actors and their patterns of legitimate activity in relation to each other (BUZAN, 2014, p. 175, 176).

By offering a holistic approach, overcoming the chronic fragmentation of IR as a discipline, and linking world history, international law and historical sociology - even with limited capacity to generate hypotheses and to predict the evolution of international society -, the English School 'has earned its place' in the IR canon, in the view of Buzan (2014). However, because its characteristic, Buzan adds that the ES will never going to satisfy those who hold that positivism is the only acceptable form of knowledge in IR: "It is not alone in that and has no need to apologize for it" (BUZAN, 2014, p. 186)

ES IN REGIONAL CONTEXTS

One of the most significant theoretical and empirical advancements of the ES is the recent turn to the regional scale (BUZAN & GONZALES-PELAEZ, 2009). With the end of the Cold War, the role of regions has assumed increasing importance.

The concept of "region", according to Buzan (2012), describes "a geographically clustered subsystem of states that is sufficiently distinctive in terms of its internal structure and process to be meaningfully differentiated from a wider international system or society of which it is part" (p. 22). For the author, the region is a level of analysis between the international system and the unit (state) level and the geographical element is crucial. The author explains that the geographical clustering is justified because most interactions amongst units will travel more easily over short distances. However, regions are not just subsystems of states in an international system, "but a specific type of subsystem defined by geographical clustering" (BUZAN, 2012, p. 22).

The rise of a Westphalian form of international society produced a set of states that were homogenous in the sense of all being sovereign equals. For colonized of non-Western nations, the price of being accepted as equals by the West was the adoption of the basic primary institutions of Westphalian international society such as sovereignty, non-intervention, diplomacy, international law, great power management, nationalism, explains Buzan. However, these social structures can form distinct regional levels (BUZAN, 2012, p. 25).

The regional structure and its differentiation is a much more important feature of contemporary world politics, in the view of Buzan (2012). While once there was a hegemonic Western core over a variety of regional peripheries, this seems to be moving towards a more polycentric structure, in a more decentred international system/society containing several regional cores, the author points out. In this scenario, "the outcome would be a layered international society in which regional differentiations and dynamics would become more important, and the global dynamics of hegemony and western/global international society less important" (BUZAN, 2012, p. 45).

In considering the adoption of the English School conceptual toolbox in regional contexts, Costa-Buranelli (2014) questions how institutions of global international

society can be adopted, re-interpreted or rejected, and if these institutions can be modified, potentially having several international societies, each of them having its own interpretation of a given norm or institutions (COSTA-BURANELLI, 2014, p. 24). The author cautions about the risk of "conceptual stretching" (a notion proposed by Sartori 1970, 57).

> (...) "ES institutions, being wide concepts and "big words" of politics, are potentially subject to meaninglessness if all their facets and differentiations are sacrificed on the altar of general conceptualisation. This is especially true if, passing from the global to the regional, concepts (and therefore institutions) "travel" from one domain to several others, where the same concept can be seen in different terms (Sartori 1970, Acharya 2004). In the past, even the recent one, there was no need to do this, as the global international society was the reflection of a single, coherent social configuration, the Western-liberal one. Now, with several regional domains, a sharper definition of global institutions is necessary if we are to trace their change and semantic/social renegotiation in several regional international societies. These features should be then present in all the different interpretations of institutions across regions, so that the conceptual cornerstone of the institution remains intact while other features may change" (COSTA-BURANELLI, 2014, p. 31).

In that sense, the link between conceptualisation of institutions, their regional interpretations and the intervening role of norm localisation can help avoid the danger of a "one-size-fits-all" approach in verifying the presence/adoption of a given institution in some regional contexts, according to Costa-Buranelli (COSTA-BURANELLI, 2014, p. 33).

The English School approach is attracting attention and being reinterpreted not only in Europe and the USA, but in other regions of the world, such as China, India and Latin America. For Zhang (2014), the ES is attractive in Asia because "it seems willing and able to accommodate a culturally diverse set of intellectual approaches and historical experiences" (p. 235). In East Asia, the growth of IR has been accompanied by a distinctive learning trajectory and theory development, where "building homegrown

theories that incorporate and reflect indigenous ideas, traditions, historical experience, and perspectives is an important part of construction/innovation" (ZHANG, 2014, p. 235)

ES IN SOUTH AMERICA

South America constitutes a distinct international system linked to other systems, particularly to Central America and North America, but with its own unique properties and dynamics, for Holsti (1996, p. 150). The region has seen exceptionally high rates of peaceful conflict resolution or toleration of conflicts that remain unresolved but are not likely to be settled by recourse to war, making South America an "intriguing anomaly', in the view of Holsti.

The South American system cannot be understood adequately without recognition of the strong legal tradition that has underlain regional diplomacy in the region, stresses Holsti. "The pattern of conflict resolution in the twentieth century is unique when compared to other regions of the world. That uniqueness can best be understood as deriving from historical traditions, culture, and the importance small states place on laws and norms as protective devices" (HOLSTI, 1996, p. 181).

South American governments have frequently chosen legal means for defusing actual or potential crises, with a history of policymakers analysing issues from a legal rather than geostrategic perspective, according to Holsti. For the author, South America is almost unique in its legalistic "diplomatic culture" because in the region there is a tradition and sense of gaining honour by meeting legal obligations, which is not divorced from questions of national interest.

Arbitral procedures for resolving conflicts have been used at extraordinarily high rates compared to other regions of the world, Holsti points out: from the 1820s until 1970, South American countries used arbitration procedures 151 times and, after this, the Beagle Channel dispute was arbitrated by the Queen of England and by the Pope

(HOLSTI, 1996, p. 155, 156). However, the author stresses that military capabilities in some regions of South America continued to be targeted toward neighbours (p. 160).

The foundations for the legalism in the region "reside in the ancient Spanish and Portuguese tradition of appealing to Seville, Lisbon, or to the Pope to settle problems between the colonies, and in canon law, which is a judicial archetype" (p. 171). Holsti points out that those aspiring to be part of the South American elite have traditionally earned doctorates in civil or canon law, "and until recently most foreign ministers and career diplomats held law degrees" (HOLSTI, 1996, p. 170, 171).

Latin America can be considered as an "international regional society", in the pioneering argument developed by Kacowicz (2005). The author stresses that since the early 19th century, the newly independent Latin American countries have gradually developed complex institutions and a sophisticated regional system of international law and institutions, which included a series of regional norms that have regulated their international and national behaviour (KACOWICZ, 2005, p. 25).

No other region the world has so many treaties, letters, documents, conventions and resolutions, be it multilateral and/or bilateral, that establish obligations to settle international disputes, which demonstrates the existence of rich mechanisms of peaceful conflict resolution, in the view of Kacowicz (p, 25). However, the region has a culture of resolving disputes and conflicts in a particular way, according to the author: the break between formal principles and legal organization and the operation of pragmatic and informal institutions are related to the formation of a collective identity collective in the region, which is - at the same time - a colonial vestige, according to the author.

In the Americas, Kacowicz sees a recurrent thread that links the Monroe Doctrine, developed in 1823, through the *Tratado de Unión Perpetua* (Treaty of Perpetual Unity) proposed by Bolívar and signed in the Panama Congress in 1826, until the creation of contemporary Inter-American institutions, including the South American Community of Nations, where the theme of "exceptionalism", where the region is considered as a special place governed by international law in contradiction with power politics that predominated in Europe (p, 25). In Latin America, particularly, the author

stresses that this tradition in favour of international law is partly to prevent war and potential intervention of powerful extra-regional powers, especially the United States. The author emphasizes that the principles of non-transfer of territories (*uti possidetis*); non-intervention; non-recognition of territorial conquests; the use of morality in international relations; equality of states and respect for sovereignty (p. 26).

The elements of the Latin American society, according to Kacowicz, are identified as common interests and values shared, general goals of any international society:

- The states were obviously interested in preserving the regional system of independent states;
- They have remained firm regarding the respect for their sovereignty and independence, evidenced by the promotion of the principle of non-intervention;
- They have maintained regional peace, being the absence of war considered the normal condition in their international relations;
- By resorting to peaceful mechanisms of conflicts and maintaining diplomatic relationships within the general framework of international law, restricted the use of violence in their relationships (KACOWICZ, 2005, p. 25).

However, Kacowicz considers that all these common elements have allowed Latin American countries to reach a high degree of civility in their international relations that represent a contradiction, a paradox, when in juxtaposition with the “uncivilized, if not brutal” political relations within their own borders. This paradox has its origin, according to Kacowicz, in the common values and in the political culture of the region (p. 26).

The social, political values, and economic essentials in Latin America are derived from the European tradition, which makes the region to be part of the Western Christian culture (or "civilization"), according to Kacowicz (p. 26). “The political and diplomatic systems of the region are rooted in a strong culture of legalism, conditioned by idealism, paternalism, legalism and formalism, the author points out, adding that “the Hispanic tradition of political monism, organicism, legal idealism and patrimonialism has forged

the dominant political values system" (p. 26). In the international level, "this legalistic culture helps us understand the singular importance of legal and formal procedures in the elaboration of public policies and how to deal with international conflicts by Latin American countries" (p. 26).

"Latin America contains much more than the realists would allow for and much less than the liberals do", according to Federico Merke (2011, p. 4). The author stresses that key realist variables for going to war, such as anarchy, security dilemmas and uneven distribution of power, are present in the region but, even so, there were very few conflicts between Latin American states in the 20th Century; neither prominent variables of Liberalism, such as democracy, international regimes nor economic interdependence were the determinants for the construction of this area of peace, in the view of Merke (2011).

In *Unpacking South American International Society: A Historical Sketch*, Merke (2014) examines the region's primary institutions and its historical contours in the *longue durée* of the South American international society. To the five institutions listed by Hedley Bull in *The Anarchical Society* (balance of power, international law, war, diplomacy, and great power management), Merke adds "*concertación"* and regionalism, to the South American international regional society (p. 72).

Making a distinction between two interstates societies in Latin America, which for Merke are "a Central American interstate society acting as a sub-complex within North America, and a South American interstate society" (p. 71), the author points out that South America "seems to be a more self-contained region", derived from "its geopolitical location and its degree of insulation from extra-regional influences, South America developed its own relatively autonomous regional balances of power" (MERKE, 2014, p. 71).

The discourse and practice of international law, fundamental in the construction of South America as a regional society "went beyond normal acceptance", for Merke, who adds:

> "Some of today's international norms are South American contributions: *uti possidetis*; the ban of conquest as a valid mode of territorial possession; the limitation to the exercise of diplomatic protection in favour of foreigners (Calvo Doctrine); the prohibition of foreign intervention for collecting debts (Drago Doctrine); diplomatic asylum, the ruling out of colonialism, and the extension of sovereign rights for coastal states" (MERKE, 2014, p. 76).

In terms of balance of power and extra-regional great power management, Merke points out that the U.S. has not intervened in South America in comparison with the level of intervention in Central America and the region displays "an even combination of great power management and balance of power in a way that both institutions overlap each other in sometimes unrecognizable ways" (2014, p. 76). Merke proposes that South American regional interstate society has evolved beyond the dynamics of power balancing and is "closer to a security regime" (p. 77, 78).

Diplomacy has been a central discourse and practice in the history of South America, in the view of Merke, which represents "a complex repertoire of formal and informal mechanisms to channel conflict within a framework of agreed norms and rules, namely non-intervention, *uti possidetis*, and peaceful conflict resolution" (p. 78). Merke adds three "particular derivative institutions from diplomacy", which the author considers to be *concertación*, hemispheric organization, and regionalism.

Concertación (literally concertation) is "a unique institution of South America" and is defined "as a loose form of international organization based on consensus-seeking and peaceful settlement of disputes", in the view of Merke, which points out that the normative instrumental of concertación is *uti possidetis*, non-aggression, non-intervention and arbitration. This institution is "embedded in a deep-seated imaginary of South America as a *Patria Grande*, namely a nation (interhuman society) split into twenty-two republics (an interstate society)", according to Merke (2014, p. 83).

ES AND REGIONAL SECURITY COMPLEX THEORY (RSCT)

The English School theoretical framing for the study of international security incorporates elements of other mainstream IR theories. In their approach to International Security, as Buzan (2014) points out, Realism and Marxism see a world of enemies and rivals running on a logic of survival, coercion, calculation, relative gains and inevitable conflict; Liberalism sees a world of rivals and friends running on a logic of calculation, belief, absolute gains and the possibility of Peace; and constructivism considers the logic of enemies, rivals and friends, running on a logic of coercion, calculation and belief. The advantage of the ES, in the view of Buzan, is to incorporate these approaches and contextualize them in a range of possible types of international society (BUZAN, 2014, p. 181).

According to Buzan, "a security complex is defined as a group of states whose primary security concerns link together sufficiently closely that their national securities cannot realistically be considered apart from one another Security complexes emphasise the interdependence of rivalry as well as that of shared interests" (BUZAN, 1991, p. 190).

In *Regions and Powers*, Buzan and Wæver proposed that "outside global-level powers impinge on RSCs in various ways, but seldom, short of overlay, determine the regional security dynamics" (BUZAN, 2012, p. 43). The rivalry between superpowers, according to Buzan, influenced regional development in various ways "ranging from arms supplies (e.g., the Middle East, South Asia) through alliances (most regions) to direct interventions (e.g., Southeast Asia)" (p. 43). However, Buzan stresses that these regions represented security dynamics that were independent of great power influence even though they were amplified or muted by great power involvement (BUZAN, 2012, p. 43).

The end of bipolarity and the removal of the Cold War overlay from regional politics and regional conflicts, in the view of Ayoob (2010), have made it imperative that international and regional security analyses must identify "the key variables that affect the construction and maintenance of regional order, defined `the mode of conflict management within the regional security complex'" (AYOOB, 2010, p. 247). The author stresses that conflict management within regions will be driven largely by regional

considerations and must be undertaken primarily by states belonging to the region: “Such conflict management cannot succeed unless there is a consensus within discrete regions regarding the form of regional order appropriate for each region” (AYOOB, 2010, p. 47). For Ayoob, there is a need for regional states to move from conceiving the region merely as a system of interacting units to the notion of a `regional society’, which, for him is “a necessary steppingstone towards the building of orderly and peaceful regional communities” (p. 247).

The importance of regions is judged by great power decision-makers in much more utilitarian terms, including possession of strategic resources, volume of trade and investment, and pressure from powerful domestic constituencies, in the view of Ayoob: “Great power involvement in regional security complexes can be best explained by arranging such involvement on a continuum ranging from 'disinterest’ or 'low involvement’ through 'instrumental intervention’ to 'identification’ ” (AYOOB, 2010, p. 252).

For the study of security within and between regions, Buzan (2012) proposes an approach to the study of regional international security which combines two theoretical perspectives: Regional Security Complex Theory (RSCT) from the Copenhagen School, and international society from the English School (p. 26).

Buzan emphasizes that these perspectives enable one to take a nuanced view of the differentiation among contemporary regions: while RSCT focuses on how security dynamics have shaped modern regions since their formation; the English School approach focuses on the extent to which these security dynamics “have generated constructions of international society at the regional level that are significantly distinctive from the western norms and institutions that define the global level of international society” (BUZAN, 2012, p. 26).

“Primary institutions are deep, organic, evolved ideas and practices that constitute both the players and the game of international relations”, according to Buzan (2010, p. 41). Primary institutions of international society, such as sovereignty, territoriality, balance of power, international law, diplomacy, nationalism, great power management and the Market, are the key to approach the processes of securitization,

in Buzan's proposition. The agenda of international security is impacted strongly by institutions such as sovereignty, territoriality, nationalism, defining and framing the discourse of security and such institutions might become the referent object for the process of securitization (BUZAN, 2010, p. 41)

Combining the English School and RSCT perspectives allows for the regional international societies to be viewed as a set of ideal types, according to Buzan (2012). This can be used also for comparing regional international societies both with each other and with the western/global core. Buzan proposes than an English School scheme which has four general types of international society, in his own words:

> - "*Power-Political* represents much the same as the traditional English School's "international system", based largely on enmity and the possibility of war, but where there is also some diplomacy, alliance-making and trade. Survival is the main motive for the states and institutions are minimal, mostly confined to rules of war, recognition, and diplomacy;
> - *Coexistence* means a pluralist, Westphalian system in which the core institutions of interstate society are the balance of power, sovereignty, territoriality, diplomacy, great power management, war, and international law;
> - *Cooperative* requires developments that go significantly beyond coexistence, incorporating the more solidarist side of the English School and can be in the guise of interstate cooperative projects such as the creation of a shared market economy, the pursuit of human rights, joint pursuit of big science, collective environmental management, and suchlike;
> - *Convergence* means the development of a substantial enough range of shared values within a set of states to make them adopt similar political, legal, and economic forms. The main empirical case is the EU" (BUZAN, 2012, p. 27, 28).

These four types, Buzan adds, overlap with the set of three ideal types from RSCT, which depends on whether security interdependence is defined more by amity or more by enmity:

- "*Conflict formations*, in which the main drivers of security interdependence are fear, rivalry, and mutual securitizations (mainly power-political and some coexistence);
- *Security regimes*, in which states have made arrangements to reduce the security dilemma among them, and therefore to constrain processes of mutual securitization (bridging across coexistence and cooperative);
- *Security communities*, in which states have desecuritized their relationships and no longer expect or prepare to use force against each other (bridging across cooperative and convergence)" (BUZAN, 2012, p. 27, 28).

The spectrum of types of international society can be set up in various ways and the type of international society has "huge consequences" for its agenda of international security, Buzan stresses. The author points out that "the classical English School view of coexistence international societies, like the realist one, stresses great powers, war and the balance of power as key institutions of the social order"; while in cooperative and convergence international societies, war and the balance of power will be respectively marginalized or nearly eliminated as institutions (BUZAN, 2014, p. 181)

For Buzan, "South America contain mainly modern states, but a mix of natural states and open-access orders, in coexistence/cooperation international societies that have moved towards becoming security regimes" (BUZAN,2012, p. 40)

CONCLUSION

By considering historical processes in the *longue durée* and by consist of being a *via media* between contending diverging mainstream IR theories, in attempting to bridge some elements of those frameworks, the English School presents itself as a multi-

layered and complex approach, which presents itself as a very suitable framework in the study of regional contexts, especially South America.

The methodological pluralism and holistic possibilities are also characteristics of the ES which is of special interest to us in the next chapter, where we accept the proposition by Barry Buzan of combining his Regional Security Complex Theory (RSCT) with the English School approach, analysing the contemporary South American Regional Security.

Chapter 6

DEFENCE COOPERATION AND MILITARIZATION IN CONTEMPORARY SOUTH AMERICA

INTRODUCTION

The agenda of issues, divisions and tensions in South American international security remains similar for the last three decades, even while the region has undergone profound changes and made strides in the area of international security and cooperation in Defence in recent years. Scholars have described the absence of war and low interstate military conflicts, coupled with efforts of cooperation and high levels of internal violence, as a "puzzle" (BUZAN & WAEVER, 2003), an "intriguing anomaly" (HOLSTI, 1996), a "paradox" (KACOWICZ, 2016) both on empirical and theoretical grounds. "The diplomacy of cooperation coexists with that of militarized coercion, just as in the past", in the view of Mares and Kacowicz, who add that "multiple topics in the international security outlook in the region have deep historical roots and significant manifestations in the region today" (KACOWICZ & MARES, 2016, p. 11).

Hemispheric agreements and institutions, such as the Organization of American States (OAS) and the Inter-American Defence Board (IADB), continue to play a relevant role in the region; joint military exercises and the participation of several South American nations in United Nations (UN) peacekeeping troops have strengthened and intensified; while new arrangements and institutions were created and developed, such as the establishment in 2008 of the South American Defence Council (*Consejo de Defensa Sudamericano*, or CDS). However, the sources of division and tensions, such as differences in threat perceptions, tensions over democratization and economic integration, "the same obstacles that plagued the development of a consensual regional security agenda during the 1990s (...) are now on the agenda of the new regional security institutions" (TRINKUNAS, 2013, p. 85).

The region is still regarded as a region with low interstate conflict concerns, However, state to state conflicts and tensions are still relevant, as seen in several instances, such as long-standing territorial contests and areas in dispute; sub-regional balances and instabilities; militarization and rearmament of many countries in the region. In addition, as many scholars indicate, the issues of “intermestic” security such as threats from non-state (organized crime) and sub-state military forces (such as paramilitaries), drug trafficking and transnational criminal gangs with ramifications throughout the region, are a local, international and global concern. Cooperation to foster security and development in the region is very significant, however with organizations which overlap in their scope and aims and still lacking institutionalization, as seen in the disbandment of the UNASUR and, consequently, its CDS.

Informed by the combination of the frameworks of Buzan and Waever's (2003) Regional Security Complexes Theory (RSCT) and the English School of IR, following a proposal by Buzan (2012), and methodologically based on a systematic review (PETTICREW & ROBERTS, 2006) as a research design, it advances the argument that the South American primary institutions are fundamental dimensions for understanding the processes of cooperation and militarization of the region's international security contexts and dynamics. Moreover, we find evidence suggesting that the region, instead of a conflictual or a cooperative, continues to be a security regime.

THEORETICAL PUZZLE OF INTERNATIONAL SECURITY AND DEFENCE IN SOUTH AMERICA

There is a profound questioning and theorizing by International Security scholars about (and in) South America as to what accounts for the conflicting (and almost paradoxical) processes that involves, at the same time, cooperation efforts to improve security between nation-states and movements of militarization and the possibility of conflicts – even war – between the nations in the region. Scholars point out the limitations of mainstream IR theories commonly used to analyse the South American context, namely of a Realist and Liberal nature, not only to describe and explain, but more than that, to "understand" what accounts for this puzzle, and call for multidisciplinary or “multi perspective” frameworks (ADLER & GREVE, 2009; BATTAGLINO, 2012; DUARTE-VILLA & DE SOUZA PIMENTA, 2016; VILLA, 2018).

The theoretical puzzle comes when different accounts and analyses – based on the mainstream frameworks which privilege certain aspects in detriment of others – confront each other and find contradictory and very different pictures: where Realism finds conflict and militarization, Liberalism and Constructivism emphasize cooperation and discusses a Security Community in South America. As in the mainstream perspectives in International Relations at the global level, most authors see in Realism-Neorealism the most appropriate approach to understanding the same reality, emphasizing balance of power, aspects such as the security dilemma, militarization, arms race, and the hegemonic stability theory applied to the South American context (MARES, 2012; BATTAGLINO, 2012; SCHENONI, 2015). Others, based on either more Liberal or more Constructivist approaches focus on the analysis of issues of cooperation, democratic peace, and whether the region constitutes a security community (HURRELL, 1998; OELSNER, 2016).

Many studies in and about the region have adopted the conceptual tools of Regional Security Complex Theory (RSCT) mostly in combination with either Realism, Liberalism or Constructivism, which have produced highly valuable insights, however tending to reproduce these dichotomies. The complexity of the South American international security context could benefit also from holistic approaches, a research program which is embraced by the English School (BUZAN, 2014). The combination of RSCT, from the Copenhagen School, with elements of the English School (ES), was proposed by Barry Buzan (2012), the author of the RSCT (with Ole Waever, 2003) and one the leading scholars of the ES research program.

In Villa's evaluation (2018), analyses of international security in the region tend to present two different views: "(…) either South America as a zone of peace or partial security community, or South America as a mixed region where there is coexistence of an area more closely linked to traditional security principles (the Andean region) and another that sees the emergence of a weak security community"[39] (VILLA, 2018, p. 143).

[39] (…) "ou América do Sul como uma zona de paz ou de parcial comunidade de segurança, ou América do Sul como uma região mista em que coexiste uma região mais atrelada a princípios tradicionais de segurança (a região andina) e outra de que vê a emergência de uma comunidade de segurança fraca" (VILLA, 2018, p. 143).

The English School retains its potential for synthesizing grand theory, Buzan (2014) stresses, by the rebuttal of the argument about incommensurability between paradigms that separates liberal, realist and Marxian approaches to IR, overcoming the fragmentation of IR as a discipline. Thus, the English School's holistic approach to knowledge creation contrasts with the 'fragmented' approach dominant in the US (BUZAN, 2014, p. 23).

The English School theoretical framing for the analysis of international security incorporates elements of other mainstream IR theories. In their approach to International Security, as Buzan (2014) points out, Realism and Marxism see a world of enemies and rivals running on a logic of survival, coercion, calculation, relative gains and inevitable conflict; Liberalism sees a world of rivals and friends running on a logic of calculation, belief, absolute gains and the possibility of Peace; and constructivism considers the logic of enemies, rivals and friends, running on a logic of coercion, calculation and belief. The advantage of the ES, in the view of Buzan, is to incorporate these approaches and contextualize them in a range of possible types of international society (BUZAN, 2014, p. 181).

A Regional Security Complex (RSC) is an intermediate level of analysis between States and the global system, where these extremes of national and global security interplay, and "refers to the level where states or other units link together sufficiently closely that their securities cannot be considered separate from each other" (p. 43). Furthermore, RSC theory "has a historical dimension that enables current developments to be linked both Cold War and pre-Cold War patterns in the international system" (BUZAN & WAEVER, 2003, p, 40).

The RSC Theory aims to create a subsystem that privileges the regional dimension and, for this, part of the idea of security regions built by States that are so close in security issues that cannot be thought separately. Its theoretical foundation brings references of the Realist mainstream, of the Liberal theories, but mainly of the constructivism, because it thinks interdependence as fruit of the practice of the actors for security, who or what they securitize, that is, "security is what the actors make it" (BUZAN & WAEVER, 2003, p. 48).

The essential structure of a RSC, according to Buzan & Waever, is defined by two kinds of relations: power relations (balance of power) and patterns of amity/enmity, which are "historically derived" (2003, p. 49, 50). The authors list the main variables for the empirical support of the Theory of Regional Security Complexes, which are based on geographical proximity, added to an anarchic international system permeated by the power relations between states. The geographical component refers to the fact that states of limited power have their influence restricted, in general, towards their neighbours, that is, relations of security interdependence are based on the power of the units in question, the power exercised within the regional complex of security, in which the proximity experience added to the fears of the actors builds relations of friendship / enmity.

The South American RSC was, according to Buzan & Waever (2003), "something of a puzzle" (p. 305). However, the authors considered the region as "standard" RSC (with its security concerns being driven mainly by its own dynamics, not by a great power). The United States is considered as an external actor in the South American RSC, although the US, in a "highly asymmetrical" relationship with South America, does influence the region and it is a "major factor" in the regional security calculations: "But the US engagement is not constant and the United States neither 'rules' the region nor even generally shapes it" (p. 309).

The configuration of RSC in South America, according to Buzan & Waever (2003) was considered intermediate, that is, it would constitute a "security regime" (situated between "conflict formation" and "security community"), and its main security dynamics "predates, continued during and still exists after the Cold War" (p. 309). The South American RSC was divided by the authors into two regional subcomplexes: 1) the Southern Cone (Brazil, Argentina, Uruguay, Bolivia, Paraguay and Chile), which is "gradually pointing towards a security community"; 2) the Andean (Colombia, Venezuela, Ecuador, Peru, Suriname and Guyana), which presents a conflictual and unstable situation, aggravated by transnational security problems (such as drug trafficking).

The security concept proposed by Buzan and Waever in the RSCT encompasses not only material and structural aspects, but also the processes of social interaction between the actors. This conception is also reflected in the English School research program which, according to Buzan (2014), is interested in analysing the social dynamics such as the ideational forces, the rules of conduct, the intentionality of the actors, and the normative tensions and problems generated by the interplay of these factors.

Models of international security and definitions of threats are questionable and, as Hurrell (2007) emphasizes, there is a danger of imposing external categories on to regional realities, adding that "even if they also have global connections and ramifications, most security threats are tied to local and regional circumstances, and have to be understood through complex cultural and contextual filters" (p. 132).

National Defence remains at the centre of the concerns of many South American governments, even with little chance and/or probability of war between them, with military forces prepared for the possibility of imminent war. In this chapter, we focus on the more traditional concept of Defence, understood here in a military and state-centred conception, such as "the study of the threat, use, and control of military force" (WALT, 1991, p. 212).

This delimitation in the concept of Defence finds resonance in the fact that most studies on Latin American defence are still based on the state and traditional aspects of threats, and the problematic distinction between international "security" and defence in the region. Saint-Pierre (2011), warns of the "danger" in dislocating the different nature of these concepts, and on the adoption of a "multidimensional" approach to security in the region, since most issues, such as migration and poverty, reflect the State's deficiencies in offering economic, political and social conditions, constituting "more than threats, they are clear symptoms of incomplete sovereignty and the unwanted consequences of deficient democracies" (SAINT-PIERRE, 2011, P. 415). The author warns that the concept of "multidimensional security"

> (...) "indiscriminately mixes various elements of a different nature (such as threat, danger, challenge, enemy), of varied origins (such as social, political, economic, environmental, energy), which

> require various types of responses (economic, public health, cultural, educational , military, police), articulated by different state agencies (different ministries and state secretariats), society and people"[40] (SAINT-PIERRE, 2011, p. 409).

The strengthening of police forces or their replacement by Armed Military forces in certain activities has been an increasingly frequent trend in Latin America, according to Saint-Pierre (2011), reflecting the uncontrolled growth of violence and crime that seems to overcome the public security capacity. This process, according to the author, has led to the deprofessionalization of the Armed Forces and, in many cases, to their corruption in the face of the economic power of crime, with no effective results: "Removing the Armed Forces from their role of foreign policy means weakening both, not solving the problem of public security and hiding the problem to be solved, that is, adapting the police forces to the current challenges in public security"[41] (p. 431).

Countries face security challenges, however, increasingly intertwined in tensions between processes of national and international dimensions, redefinition of concepts of national security, internal security, and national defence, in addition to the challenges of maintaining cooperation and regional security, in the analysis of Celi de La Torre & Grabendorff (2020). Traditional concepts and mechanisms, in the view of the authors, whether national or multilateral, do not respond effectively to this reality (CELI DE LA TORRE & GRABENDORFF, 2020).

INTERNATIONAL SOCIETY AND INSTITUTIONS

In the English School approach, primary institutions represent fundamental underlying norms, and are more evolved than designed, according to Navari (2009, p. 16). Hurrell (2002) explains that "(...) by an institution we do not necessarily imply an organisation or administrative machinery, but rather a set of habits and practices"

[40] (...) mistura indiscriminadamente vários elementos de natureza diferente (como ameaça, perigo, desafio, inimigo), de origens variadas (como sociais, políticas, econômicas, ambientais, energéticas), que requerem vários tipos de respostas (econômicas, de saúde pública, culturais, educativas, militares, policiais), articuladas por diferentes agências do Estado (os diferentes ministérios e secretarias do Estado), da sociedade e das pessoas (SAINT-PIERRE, 2011, p. 409).

[41] "Retirar as Forças Armadas do seu papel específico na política externa significa debilitar esta e aquelas, não resolver o problema da segurança pública e ocultar o problema a ser resolvido, isto é, adequar as forças policiais para os desafios atuais da segurança pública" (SAINT-PIERRE, 2011, p. 431).

(HURRELL, 2002, p. 71). Different from primary institutions such as sovereignty, diplomacy, international law, the secondary institutions, are relatively specific, concrete, and are usually designed (mainly intergovernmental organizations and regimes) (NAVARI, 2009).

"Primary institutions" of international society, such as sovereignty, territoriality, balance of power, international law, diplomacy, nationalism, great power management, are the key to approach the processes of securitization, for Buzan (2010). The agenda of international security is impacted strongly by institutions such as sovereignty, territoriality, nationalism, which might define and frame the discourse of security and become the referent object for the process of securitization (BUZAN, 2010, p. 41).

Secondary institutions are those mostly analysed in regime theory and liberal institutionalists and relate to the organizational usage of the term. They are for the most part intergovernmental arrangements consciously designed by states to serve specific functional purposes, according to Buzan. They include the United Nations, the World Bank, the World Trade Organization and the nuclear non-proliferation regime (BUZAN, 2014, p. 16, 17).

The idea of "society" expressed in the concept of International Society elaborated by Hedley Bull, "does not in any way imply that relations among states are necessarily peaceful, stable or harmonious" (ALDERSON & HURRELL, 2000, p. 4). Levels of conflict or cooperation occur against the backdrop of shared institutions, and by considering the importance of a common framework of rules and social norms, power and conflict might "play a major, even at times dominant, role in international relations" (ALDERSON & HURRELL, 2000, p. 4).

Power remains a central 'institution' of international society as analysed by Bull, in the view of Alderson & Hurrell, when we consider that the balance of power, the role of Great Powers and Great Power management, and the institution of war are all about it (2000, p. 5). The framework of norms, according to these authors, "shape the game of power politics, the nature and identity of the actors, the purposes for which force could be used, and the ways in which actors justify and legitimize their actions" (p. 23).

Moreover, concepts such as state sovereignty, international law and war, are not given by power politics, according to Alderson and Hurrell, who add: “Rather shared and historically grounded understandings of war or sovereignty define what the nature of the game is, how it is to be played and, critically, how it might change or evolve” (ALDERSON & HURRELL, 2000, p. 24).

Latin America can be considered as an “international regional society”, in the argument developed by Kacowicz (2005). The author emphasizes, as norms of this society, the principles of non-transfer of territories (*uti possidetis*); non-intervention; non-recognition of territorial conquests; the use of morality in international relations; equality of states and respect for sovereignty (KACOWICZ, 2005, p. 26).

The South American system cannot be understood adequately without recognition of the strong legal tradition that has underlain regional diplomacy in the region, stresses Holsti. “The pattern of conflict resolution in the twentieth century is unique when compared to other regions of the world. That uniqueness can best be understood as deriving from historical traditions, culture, and the importance small states place on laws and norms as protective devices” (HOLSTI, 1996, p. 181).

MILITARIZATION IN SOUTH AMERICAN COUNTRIES

In 2020, the new version of the national defence policy announced by Brazil caused concern throughout the region (INFOBAE, 2020). The document expresses a shift in Brazil's foreign security policy, indicating that the Brazilian Armed Forces consider that South America *is no longer a region free of possible armed conflicts* and are preparing to intervene in the "solution" of regional problems[42]. Citing tensions and crises in the country's strategic environment, according to the document Brazil could be motivated

[42] The documents National Defence Policy and National Defence Strategy were delivered by the Brazilian Ministry of Defence for approval by that country's National Congress in August 2020. Regarding the possibility of conflicts and Brazilian involvement in the region, the documents state verbatim: “(...) the possibility of tensions and crises in the strategic environment cannot be ignored, with possible consequences for Brazil, so that the country may be motivated to contribute to the solution of possible controversies or even to defend its interests” (Item 2.3.10, p. 17). In Portuguese: *“* (...) *não se pode desconsiderar a possibilidade da ocorrência de tensões e crises no entorno estratégico, com possíveis desdobramentos para o Brasil, de modo que o País poderá ver-se motivado a contribuir para a solução de eventuais controvérsias ou mesmo para defender seus interesses” (item 2.3.10, p. 17*). Available online: https://www.gov.br/defesa/pt-br/assuntos/copy_of_estado-e-defesa/pnd_end_congresso_.pdf

to seek to contribute to the solution of eventual controversies or to defend their interests. The Amazon, as well as the South Atlantic, is an area of geostrategic interest for Brazil, because of its biodiversity, mineral and water resources as well as energy potential, is a priority for the country, says the official document. The Amazon forest is the largest water and biodiversity reserve in the world, 60% of which belongs to Brazil.

The sources of interstate conflict, such as boundary and territorial issues; disputed natural resources; porosity of borders propitious to transnational crime, cross-border insurgency, drug and arms trade, and illegal migration are all present in most regions of South America. As Thies (2016) emphasize, these issues do not necessarily become militarized, but they often do – and it might be "(...) still be premature to completely eliminate the idea of interstate war from our understanding of Latin American conflict" (p. 116).

Thies indicated that not much more than a decade ago, the strategic triangle formed by Colombia, Ecuador, and Venezuela have been to the brink of war. In 2008, Venezuela sent 6,000 troops to the border and Ecuador mobilized its military, after the Colombian military attacked a guerrilla camp in the former. "A week later, the three presidents ended the crisis at a meeting of the Rio Group in the Dominican Republic, though Colombia and Ecuador did not re-establish diplomatic relations until 2010" (THIES, 2016, p. 116). Even if the conclusion of this crisis, among others, demonstrates not only the potential for war but aspects of presidential diplomacy and "*concertación*" in South America, military build-up continues in the region and is a matter for concern.

However military expenditure numbers might be misleading or misrepresented, they might offer some clues for the regional movements, with caution. As Colgan (2011) warns

> (...) "because military expenditure is one indicator of military strength, countries have a strategic incentive to dissimulate in their official figures. Thus, both the reliability and validity of these data require a degree of analytical caution beyond what is normally expected for other quantitative datasets (e. g. measures of GDP)" (COLGAN 2011, p. 548).

Brazil accounts for half of all defence spending in Latin America, Trinkunas pointed out (2013, p. 85). Brazil seeks a constant match between its defence expenditures with the total sum of the rest of South America, which, in Monteiro's (2014) assessment, seems to be the situation of “equilibrium” in order to maintain its leadership position in the region (p 145). These observations are also reflected in the RESDAL (2016) data, which shows that between 2006 and 2016, Brazil concentrated almost 50% of the total sum of South American military budgets (in 2016, US $ 19,978,247,480). The data that draws the most attention is Venezuela, the second largest budget in 2016 (US $ 8,549,765,946), and which was the only country that continually increased its budget in all the years of the series, despite going through an economic downturn in some of these years. Colombia comes in third (US $ 4,916,946,842 Colombia) and Chile was the fourth largest budget (US $ 4,571,174,008), still according to RESDAL data (2016).

Analysis of resources allocated to the defence budget tend to associate it to those related to the purchase of weapons, Battaglino (2016) indicated. However, the author calls attention to the fact that in relation to the South American countries’ defence budgets, there is no relationship between total defence spending and weapons purchases. Based on data by SIPRI 2014, the author stresses that Arms purchases have greatly increased in South America in recent years, climbing 92 per cent in South America in period of 2005–2013 compared to 1997–2005 ($6.3 billion dollars between 1997 and 2004 to $12.5 billion between 2005 and 2013) (BATTAGLINO, 2016, p. 231).

Chile is the biggest spender on arms in the region, with a military budget four times smaller than Brazil; and Venezuela is the second-largest importer of weapons. Chilean arms purchases are among the most challenging for analysts to understand, according to Battaglino, since they “(...) do not appear to be part of Chile’s international peacekeeping profile. The purchases, nevertheless, also increase Chile’s abilities within its neighbourhood” (2016, p. 236). In the case of Venezuela, the acquisition of military equipment has been driven not only by economic surge in resources, but also by “a shift in perceptions of threat, which has identified the United States as the main threat to

security (BATTAGLINO, 2016, p. 237). These data are in line with the conclusions made by Villa (VILLA, 2018) as the author finds evidence that the new political-military goals of countries like Brazil, Chile and Venezuela, taking into account medium-term trends, "began to consolidate in the 2003-2007 period" (VILLA, 2018, p. 139), which was a period of political changes and vigorous economic expansion in South America.

Brazil, Chile and Venezuela stood out in the first two decades of the 2000s as the main armament buyers in Latin America, purchasing sophisticated armaments such as Chile's American F-16 fighter planes, Russian Sukhoi-30 planes by Venezuela, and the Swedish Gripen-NG aircraft by Brazil (DUARTE-VILLA & DE SOUZA PIMENTA, 2016). These cyclical military investments, in Duarte-Villa and De Souza Pimenta's view, point "to the emergence of traditional security dilemmas between neighbouring countries" (p. 453).

The purchase of sophisticated weapons, especially Chile, Venezuela and Brazil (but not restricted to these countries) in the last twenty years represents "a critical point" that tensions the idea of a permanent (democratic) zone of peace in South America, according to Villa (2018), who adds: "The critical South American moments are not the wars, due to their absence, but the moments when an arms build-up is operated" (p. 139).

In the period of 2005-2013, according to Battaglino (2016), there was a significant increase in the amount of purchases in South America, with a rise in sales from suppliers such as Spain, Italy, Holland, and the emergence of China and Russia as new players in the regional arms trade, and the main armaments acquired in most cases are different types of aircrafts, followed by ships. The author emphasized that in two cases, Chile and Venezuela, there were substantial increases in acquisitions (BATTAGLINO, 2016, p 235).

Brazil, Venezuela, and, to a lesser extent, Chile, in Villa's analysis (2018), seek to modernize their military power capabilities, while seeking to strengthen strategic ties and partnerships with governments considered to be global suppliers of advanced military material. However, the author points out that "there is a condition of a political nature that fuels the arms build-up of the South American regional security system,

which has little to do with strictly traditional concerns in itself, in military terms" (VILLA, 2018, p. 151). Emphasizing that "there are certainly domestic motivations that also encourage build-up in the case of these three countries" (p. 151), Villa warned that, due to the non-explicit nature of the domestic security goals and regional policies of these countries, they generate fears in several neighbour countries, due to the asymmetry and poverty of information and communication, in addition to the low institutionalization of confidence measures between actors.

The process of modernization of the military and arms acquisitions provide conditions for the resurgence of mistrust or misrepresentation of neighbours in relation to the countries that lead this build-up, in the assessment of Villa (2018, p. 151). The author pointed out that the South American arms build-up reveals two simultaneous and contradictory movements: one that pulls towards traditional (neo)security and militarization assets and another that seeks to generate confidence building measures efforts (VILLA, 2018, p. 154).

> "The regional and global goals of countries like Brazil, Chile and Venezuela, which are more political than military goals themselves, however, suffer from the problem of misrepresentation, given that it is not clear to some of the neighbouring states of these three countries what are the motivations behind the build-up. Thus, what for Brazil, Chile and Venezuela could seem like political goals are interpreted as traditional goals by neighbours, or even between them, as in the case of Brazil-Venezuela. (...) misrepresentation is common to the South American complex, and not located in the Andean subcomplex, or at least, poles of irradiation of the suspicions about the motivations involving countries of both subsystems"[43] (VILLA, 2018, p. 157).

[43] "As metas regionais e globais de países como Brasil, Chile e a Venezuela, que são metas mais de natureza política que militar propriamente dito, contudo, sofrem do problema de *misrepresentation*, dado que não é claro para alguns dos Estados vizinhos àqueles três países quais são as motivações por trás do *build-up* destes. Assim, o que para Brasil, Chile e Venezuela poderiam parecer metas políticas são interpretadas como metas tradicionais por vizinhos, ou mesmo entre eles, como no caso Brasil-Venezuela. (...) a *misrepresentation* é comum ao complexo sul-americano, e não localizadas no subcomplexo andino, ou no mínimo a polos estatais de irradiação das desconfianças sobre as motivações envolve países de ambos subsistemas" (VILLA, 2018, p. 157).

The apparent arms race of the early 2000s is a result of “perceptions of increased domestic and international threats have spurred higher levels of defence spending, particularly in the cases of Colombia and Venezuela” (TRINKUNAS, 2013, 85). This process creates problems, according to Duarte-Villa and De Souza Pimenta (2016), who warned the cases of Brazil, Chile and Venezuela as particularly relevant, since the lack of clarity about the intentions of these countries fuels suspicions that the arms build-up have traditional military objectives related to the security dilemma (DUARTE-VILLA & DE SOUZA PIMENTA, 2016, p. 454).

GREAT POWERS AND EXTRA-REGIONAL INFLUENCE

In the South American Regional Security Complex proposed by Buzan & Waever, the United States is considered an external actor. However, even if the United States has not directly intervened or invaded militarily any South American country, Washington remains a central actor in the region, in the view of Long (2018),” even in periods of less notable diplomatic activity” (p. 120).

While the region is economically dependent on the United States, the superpower has never intervened directly with troops in the territory of South American countries, Mijares stressed (2018). According to the author, there is a generalization of “a dual vision” in South America in relation to the U.S., which contributes to a latent general policy of a search for autonomy regarding the country: “On the one hand, it does not intervene directly, as it did in the rest of the region between 1846 and 1989; on the other hand, its political and economic influence is constant due to its capabilities and proximity” (MIJARES, 2018, p. 270)

In terms of international security, the economic, ideological and geopolitical divergences with Venezuela and the fight against drugs in Colombia reveal a strong impact in the context of the Andean subcomplex, and this is the region where the extra-regional and grand power management dimension finds a critical point, which might complicate an already complex situation. As Thies (2016) pointed out: "Great Power interventions have often served both as a source and potential resolution of some conflicts" (p. 114).

In Colombia, although advertised by the US as primarily “counter narcotic program” (which mostly failed), Plan Colombia has been “an undisputed success” as a counterinsurgency program — along with the various forms of covert US assistance that came with it —, according to *The Washington Post* (2016). The newspaper states that “Washington learned to love Latin American intervention again”. Plan Colombia (2000-2006, a US $7.5 billion policy programme) anti-drug result was disappointing, as illegal coca remained a major problem, cocaine production decreased by only 5.3% in the period of implementation and human rights abuses were rampant -- “between 2004 and 2008, army troops extrajudicially executed more than 3,000 peasants, farmers, activists and community leaders to dress them in FARC uniforms and claimed they were killed in battle” (FRANZ, 2017).

The “intervention by invitation” by the US was an initiative by the Colombian government, according to Tickner (2008, p. 70), which did not resolve the articulation between armed conflict and narcotraffic in the country. However, this process of militarization meant that Colombian soldiers received training and technology (including Black Hawk helicopters), which made the country’s military to be viewed as “Latin America's best-prepared and most professional military” (WASHINGTON POST, 2016). Among other efforts, the US government provided (in a “top-secret” program revealed by *The Washington Post*) satellite-guided bomb “kits” to the Colombian forces that killed more than two dozen FARC commanders, which “included extensive CIA support and billions of dollars in additional ‘black budget’ secret funding”, according to the newspaper. By 2003, the American embassy in Bogotá counted with nearly 5,000 staff members and private contractors, making it the largest U.S. embassy in the world (WASHINGTON POST, 2016).

In Venezuela’s case, the political instability and the ideological differences of the US with the country only worsen and generate a state of alert, especially with the Bolivarian government's closer relations with Russia and China. Military cooperation between the armed forces of Venezuela and Russia, in the view of Ayerbe (2019), has generated “speculation in the US government on Russian regional geopolitical ambitions” (p. 25). The author cited the case of the Russian military arrival in Venezuela in the beginning of 2018 of joint exercises, which included military aircraft with the

capacity to transport long range missiles and nuclear weapons. Russia has consolidated a trend over the years, according to Villa (2018), of being the main arms supplier to Venezuela, accounting for the supply of 93% of the arms purchased by the Bolivarian government in the period 2003-2007 (p. 146).

The political instability in Venezuela reached a heightened risk of international military conflict in 2019 when humanitarian convoys led by the United States, Colombia and Brazil, carrying hundreds of tons of medical and food supplies were blocked at Venezuela's borders with Colombia and Brazil. Maduro accused the United States of plotting a military intervention using humanitarian convoys as the pretext for a US-led military invasion (TELEGRAPH, 2019).

The United States pressured Brazil to allow American troops into its territory, but the proposal was refused by the Brazilian Defence Department out of concern that the situation would evolve into open conflict, *Folha de S. Paulo* newspaper reported (2019). According to the newspaper, Colombia had around 1,000 US troops on the ground and set up a distribution centre in Cúcuta, a town at the border with Venezuela, where American soldiers "worked freely" (FOLHA, 2019).

The tension was diffused (even if temporarily) by diplomacy: The Lima Group, formed by the governments of Argentina, Brasil, Canada, Chile, Colombia, Guatemala, Honduras, Panama, Paraguay, Peru condemned the government of Nicolas Maduro and called for political and democratic solutions (ITAMARATY, 2019). In an address delivered at the Lima Group meeting, Brazil's Vice-President Hamilton Mourão ruled out the possibility of an intervention in Venezuela and called for a peaceful solution for "democratic co-existence in the Americas, with no extreme measures" (AGÊNCIA BRASIL, 2019)

In September 2019, the countries that form the Rio Treaty inter-American defence pact decided to activate the treaty with the goal of "acting collectively" in the Venezuela crisis. The Ministers of Foreign Affairs of the States Parties to the Inter-American Treaty of Reciprocal Assistance - Argentina, Bahamas, Brazil, Chile, Colombia, Costa Rica, Cuba, El Salvador, United States, Guatemala, Haiti, Honduras, Panama, Paraguay, Peru, Dominican Republic, Trinidad and Tobago, Uruguay and Venezuela -

adopted a resolution recognizing the threat posed by Nicolás Maduro's regime to the security and stability of the Hemisphere (ITAMARATY, 2019b).

In economic terms, China is rapidly growing its importance and influence in the region. In 2009, China assumed the position of Brazil's first trading partner. In neighbouring Argentina, in 2015, an agreement was signed to buy Chinese fighters and ocean patrol vessels, for US$ 1 billion, while also giving the Chinese the right to build a satellite-tracking station in the province of Neuquén, in Argentine Patagonia. The Chinese say the site has no military purpose and was designed as part of a lunar mission to be launched in 2017. But satellite experts say some of the equipment may also have military uses and call attention to the fact that the facility operator is a unit of the People's Liberation Army, the name of all Chinese military services (MENEZES & BRAGATTI, 2020).

"INTERMESTIC" DIMENSIONS OF INTERNAL SOCIAL CONFLICTS

The internal social conflicts and violence, along with deficiency in national public security services of most countries in South America affect their neighbours and become transnational (intermestic) issues. Latin America remains the world's most violent region not at war, according to the British magazine *The Economist* (2017), based on data from the Brazilian think-tank Igarapé Institute. The report found that 43 of the 50 most murderous cities in the world and eight of the top ten countries were in Latin America and the Caribbean, as Brazil was the highest in the world's overall murder capital: 56,212 people were killed there in 2015 (ECONOMIST, 2017).

"The problem is not only violence but the lack of state capacity to depend on an efficient justice system to face this violence", in the view of Merke (2011, p. 15). The widespread violence and the criminal groups, drug cartels and arms trafficking, human trafficking represents a challenge for the countries in the region. Although adopted by the countries in the region, international standards such as democracy and human rights are poorly enforced or ineffective, so the region "has yet to reach" the phase of forming a security community, according to Merke: "(...) the dark side of civil society – drugs, arms and people trafficking and organized crime - has become a real challenge for regional Society" (MERKE, 2011, p. 29).

Duarte-Villa and De Souza Pimenta (2016), pointed out that most of the diplomatic frictions of Colombia with its neighbours in recent years, for example, were the result of domestic conflicts in this country. The pressures and tensions were generated by the action of criminal gangs, guerrilla groups and drug traffickers, interpenetrating borders with an intense practice of arms smuggling and route to illegal drug trade, and mass migrations to neighbouring countries (DUARTE-VILLA & DE SOUZA PIMENTA, 2016, p. 460).

Conflicts and disputes between gangs for control over contraband, narcotraffic, illegal mining, combine with corruption, weak public and ineffective institutions and local and regional security services not only contribute to the high levels of violence across the region and are an international concern, especially when combined with highly organized armed groups, such as the National Liberation Army (ELN, for its acronym in Spanish).

The ELN is now the most powerful criminal group in Latin America, according to *FORBES* (2020), expanding its operations in the whole of Colombia and reaching Venezuela, with the possibility of "becoming a Colombian-Venezuelan revolutionary army, which will have profound consequences for both countries and for the criminal landscape of the region". The group has expanded not only geographically, but its scope, from kidnapping and extortion, to illegal mining, smuggling and drug trafficking, taking advantage of the chaos in Venezuela to take control of key routes along the border (FORBES, 2020).

Colombian authorities estimate that around 40% of the ELN fighting force – or 1,000 rebels - operate from Venezuelan according to *France24* (2019), which cites actions such as a car bombing at a Bogota police academy that killed more than 20 mostly young cadets**.** These factors, domestic and transnational, affect regional peace, preventing South America from changing its status from negative peace to security community (DUARTE-VILLA & DE SOUZA PIMENTA, 2016).

DEFENCE COOPERATION AND REGIONALISM

Diplomacy has been a central discourse and practice in the history of South America, according to Merke (2014), which represents "a complex repertoire of formal and informal mechanisms to channel conflict within a framework of agreed norms and rules, namely non-intervention, *uti possidetis*, and peaceful conflict resolution" (p. 78). Merke adds three "particular derivative institutions from diplomacy", which the author considers to be *concertación*, hemispheric organization, and regionalism. In the view of Merke, *concertación* (literally concertation) is "a unique institution of South America" and is defined "as a loose form of international organization based on consensus-seeking and peaceful settlement of disputes" (p. 78) , which points out that the normative instrumental of *concertación* is *uti possidetis*, non-aggression, non-intervention and arbitration. This institution is "embedded in a deep-seated imaginary of South America as a *Patria Grande*, namely a nation (interhuman society) split into twenty-two republics (an interstate society)", according to Merke, and

> (...) "shows a preference for organizational contacts to maximize scarce resources, to convey the existence of a regional identity, to increase the significance and leverage of individual nations within and outside the group, and to gather and act upon information more effectively. From the IR perspective, *concertación* goes beyond power politics yet it stops short of liberal institutionalized cooperation. Simply put, South America's diplomatic culture contains much more than realists would admit and much less than liberals would prefer" (MERKE, 2014, p. 83).

Defence and military cooperation have expanded in South America, albeit in a gradual and volatile manner, in bilateral efforts or at a regional scale. In recent years, several overlapping and competing initiatives and arrangements have been created and operate in the area of defence and international security in South America, which found their materialization in institutions such as, within UNASUR, the South American Defence Council (CDS, for its acronym in Spanish), the Centre for Strategic Studies (CEED, for its acronym in Spanish) and the Defence College (ESUDE, acronym in Spanish); and, in the case of the Bolivarian Alliance for Latin American Peoples (ALBA), the School of Defence and Sovereignty (BRAGATTI, 2019).

This process of competition and overlapping of different organizations and efforts has reflected political and strategic pluralization in the region, impacting South American security and defence institutions and architecture, which, in defining regional objectives and responses, seek to differentiate themselves from hemispheric and extra-regional institutions. Hemispheric institutions might not reflect the interests and priorities of the region. There are several initiatives and regional efforts in different parts of the continent, such as in North America, which has the Security and Prosperity Partnership of North America (SPP), reuniting the US, Canada and Mexico. In the South American context, these initiatives seek to adapt to specific needs, risks and threats, as well as to the interests of self-defence and security promoted by some South American state actors (BRAGATTI, 2019; VILLA & BRAGATTI, 2015).

In essence, it is possible to identify characteristics of *concertación* in the CDS which, in the analysis of Villa & Bragatti (2015), consisted in a pragmatic forum based on: 1) an understanding mechanism on consultation and coordination in the field of defence and security; 2) a forum for annual meetings of the Armed Forces Major States; 3) a forum for exchange in the area of military education; 4) a mechanism for sub regional participation in peacekeeping; 5) a forum for the construction of identities in defence, and a common vision of security and defence, based on specific needs and common interests of the countries of the region (VILLA & BRAGATTI, 2015). For Sanahuja & Verdes-Montenegro (2014), the CDS carried out a process of regionalization starting of a common framework process and an instance of communication, socialization and learning between the nations in the region.

The primary institution of sovereignty, as in most Latin American regionalist efforts, is central in the comprehension and formation of UNASUR and its CDS. The aversion of any kind of supranationality, the centrality of politics, the search for regional autonomy, rather than the economic-commercial aspects would explain/ reinforce the institutional "minimalism" of UNASUR, which could be a positive factor for the institution, as well as its weakness and disintegration. Since it completed ten years, in 2018, 6 countries (Argentina, Brazil, Chile, Colombia, Paraguay and Peru) announced suspension of membership in the institution, claiming that the bloc has been adrift. Mijares & Nolte (2018) emphasize that from the outset UNASUR possessed the germ of

its current crisis and its potential self-destruction, due to the lax organization design, the pre-eminence of national autonomies over regional integration and the lack of a supranational institutionality of the bloc, what the authors call a “paradox of autonomy” (MIJARES & NOLTE, 2018).

UNASUR succeeded in mediating the crisis in the context of the attack by the Colombian Armed Forces against the Colombian guerrilla camp in Ecuador in 2008. The institution also played an important role in the management and control of subsequent political crises, the discussion on the installation and use of Colombian military bases by the USA in 2008-2009; the attempted coup in Ecuador, in 2010; as well as the mediation of the crisis between the opposition and government in Venezuela in 2014, among other situations, demonstrating that UNASUR’s actions represent a “differentiated international political subsystem” in the region (PEÑA, 2009).

On the discursive side, the objectives of this institution are to preserve stability in South America, as a zone of peace, and the formation of a South American vision of defence, to identify threats and risks, to coordinate actions and articulate a common position in the international forums (UNASUR, 2008). Conceptually, the process of deepening and implementing an expression of identity and common interests in the South American defence area at the institutional level is complex, in a context where plural perceptions in defence prevailed.

On the institutional front, the CDS began to develop a certain growth of a denser organizational structure in recent years: in addition to the Centre for Strategic Defence Studies (CEED), in Buenos Aires, there was also the creation and inauguration of the South American Defence School (ESUDE), based in Quito. Other actions reinforced and stimulated defence cooperation on the continent, such as the definition of Action Plans in the area of security and defence, and the construction of a common methodology for measuring military spending on defence and exchange in military training (MIRANDA GONÇALVES & BRAGATTI, 2018)

The CDS avoided entering more emphatically into security aspects, in region heavily affected by actors and non-state and transnational security processes such as drug trafficking, organized crime, smuggling of arms and people, presence of guerrilla or

paramilitary insurgent groups, urban violence, among. In its place, the CDS is restricted to the notion of defence.

The CDS also differed from ALBA's defence integration proposal, especially in the concept of collective security assumed by the latter. However, for some authors, such as Héctor Saint-Pierre (2011), the aim at "hard defence" of the CDS was well founded: this would prevent the armed forces of South American countries from being used to solve public security problems and thus focus on national defence.

A more sophisticated conflict resolution mechanism was still absent in the CDS, and the potential for conflicts have not been solved, such as border issues between Chile and Bolivia, with the former claiming right of exit to the sea; between Colombia and Nicaragua, as a result of the dispute over sovereignty over the archipelago of San Andrés; between Colombia and Venezuela regarding the delimitation of the continental shelf of the Gulf of Venezuela (or Gulf of Maracaibo); Venezuela and Guyana on the Essequibo River basin, for example (PAGLIARI, 2015).

Several authors pointed out the serious limitations of South American defence cooperation initiatives. According to Regueiro & Barzaga (2012), there were no indications in concrete policies that point to a convergence between the countries and the various processes in this space. There were deep differences between participants in relation to core issues, and the basic policy of countries and integration priorities have not changed, along with a gap between political statements and effective actions of cooperation in Defence, according to Saint-Pierre & Montoya (2014). The authors point to the lack of common doctrine in defence initiatives in South America, where new military doctrines for cooperation in this area have not been elaborated or assimilated and, in general, the strategic designs still anachronistically reflect the expectations prior to the end of the Cold War: "[...] the attitudes that point to regional cooperation in the area of defence are confined to confidence-building gestures, still far from obeying a design consistent with a cooperative process" (SAINT-PIERRE & MONTOYA, 2014, p. 35). The publication of the South American report of defence spending opens a new path of institutionalization, as member countries meet and have a clear notion of their budgets

and expectation of the annual report of their defence costs (SANAHUJA & VERDES-MONTENEGRO, 2014; SAINT-PIERRE & MONTOYA, 2014).

The South American system of defence diplomacy shows two faces, in the analysis of Mijares (2018): one institutional, such as the CDS, and other spontaneous, based on the evaluation of capabilities and national interests. “The first responds to supranational institutional aspirations, geared toward giving the region an articulated order through coordination, while the second is the result of historical, ideological, and geopolitical conditions. This parallelism would be irrelevant if both were not mutually exclusive” (MIJARES, 2018, p. 275).

The experience shared among several South American nations in sending troops to peacekeeping missions for the United Nations was a factor to potentiate the exchange of information and confidence measures among the countries of the region. The participation of South America in peace operations is not recent: since the founding of the UN, Argentina, Brazil, Chile and Uruguay have sent military observers for missions of the organization in various parts of the world. However, starting in the 1990s (and especially after the 2000s), this participation reached unprecedented levels, constituting the region with the greatest contribution in UN peace missions. These South American countries identified that participation in UN peace missions is an integral part of the commitment to maintaining peace and international security (SOUZA NETO, 2013; BRAGATTI & COSTA, 2018).

Participation in UN peacekeeping missions is an important element in the approach and cooperation in security and defence matters for the South American countries. According to Aguilar, in the early 2010’s the South American States had participated in 56 UN operations and around that time, of the 16 operations in progress, 12 had the presence of South American countries. As an example of an outstanding training centre in the region, it is worth mentioning the Argentine Joint Training Centre for Peace Operations (CAECOPAZ), established in 1995; the Joint Peace Operations Centre (CECOPAC) in Chile, started in 2002; and the Joint Peace Operations Centre of Brazil (CCOPAB) created in 2010. The centres specialized for the necessary training for

peace operations, in addition to developing exchanges between instructors and students in the subcontinent (AGUILAR, 2011; LLENDERROZAS, 2007).

The ALCOPAZ (Latin American Association of Training Centres for Peace Operations) is an association of peacekeeping training centres, an initiative presented by Argentina with the objective of promoting efficiency and effectiveness in the involvement of Latin America in peace operations. The association was created in August 2008 and its current members include Argentina, Brazil, Chile, Colombia, Paraguay, Ecuador, Guatemala, Peru and Uruguay. One of the main effects of the association is to present a common voice in the International Association of Peacekeeping Training Centres (IAPTC), as well as to serve as a forum to share lessons learned, exchanges between centres, academic research initiatives on the issues related to peace operations and promote the exchange of knowledge between the military, police and civilian components, with the aim of encouraging the standardization of training and procedures to follow the UN guidelines (SOUZA NETO, 2013).

The implementation of joint military exercises, several of them carried out periodically for years, the consensual disclosure of expenditures and military budget, the disclosure of the "defence white papers" of each country and the integration and development of some joint projects in the defence industry, are examples of how cooperation in defence in the South American continent has the potential to profoundly continue to develop. Several efforts and processes of cooperation existed before or were created alongside, overlapping or competing with the CDS of UNASUR, and continue to develop their course.

PARADOXES OF THE SOUTH AMERICAN REGION

The institutions of South American international society express ambivalences and paradoxes specific to this region and are reflected in the practical and theoretical-conceptual aspects of security and defence. Paradoxes are expressed in empirical and theoretical terms in the processes of militarization, tensions and conflicts, in addition to being manifested in concerted and cooperative efforts, which are both stimulated and limited by institutions such as sovereignty, diplomacy, international law, balance of power, great power management, *concertación*, among others.

The South American region presents contradictory and simultaneous movements of military build-up and multiple instances of defence cooperation. After years of economic crises, the increase in economic resources since the 2000s has enabled modernization, to a greater or lesser extent and with specificities, as in Chile, where the FFAA receive immense resources from the copper law. More and more countries in the region use the armed forces to carry out internal activities, such as policing favelas in Brazil, for example, which reveals the state's shortcomings in providing basic social services to the population and ineffective public security.

One of the characteristics of militarization of conflicts and threat of war (such as the movement of troops across borders) in the region, according to Mares (2012), is its use as a strategy, more than a real possibility of war and conflict, but as a tool of negotiation among Latin American states. Mares points to several instances in which not only the leaders of these countries saw and obtained gains in using the threat of inter-state violence, but also the lack of sanctions or inaction of the regional institutions of international security in the region served as an "incentive" to this practice. Multiple, overlapping regional security institutions do not follow an institutional script when dealing with a crisis; only the International Court of Justice maintains a consistent approach to resolve disputes. Consultations and meetings of Defence, according to the author, generally do not deal with disputes between Latin American nations, preferring to leave them for bilateral negotiations. Mares points out that if the Latin American community developed a norm that would make the use of force illegitimate, not only to conquer territory, but also when it affects relations between states; any strategy of use of force in Latin America would damage the initiator's behaviour in the community's view. The author suggests that the strategic balance in Latin America can be changed to always favour the status quo:

> “This would essentially make Latin America a collective security system: if the target of militarization cannot make action irrelevant, all other members would commit to impose sanctions on the initiator. From a strictly balance of power perspective, this would mean that status quo states would need to have sufficient capacities to defeat revisionist military adventures from the outset

> in order to deter others from provoking a crisis" (MARES, 2012, p. 622)

The balance of power processes in the region are multiple, diverse and take different forms. If a regional organization such as UNASUR might had aspects of balancing towards the United States and its Hemispheric institutions, some authors stress that countries in the region might see Brazil, because of its size and capabilities, as a potential regional hegemon in South America.

Smaller countries such as Bolivia, Paraguay, and Uruguay, in a strictly Realist account, would predictably have bandwagon behaviour towards Brazil, according to Schenoni (2015); however, secondary powers such Argentina and Venezuela which, in general terms, adopt not a balancing behaviour, but a bandwagon strategy towards Brazil (SCHENONI, 2015). Flemes and Wehner (2015) find that the foreign policy strategy adopted by the countries in the region towards Brazil was composed of multiple efforts of institutional binding, buffering and economic diversification, which the authors call "soft-balancing".

Countries in the South American region seek solutions based on diplomacy and international law, rather than power display. For Merke (2014b), "power in the region works upon a broader canvass of political and social arrangements that diminish systemic pressures towards balancing or bandwagon" (p. 179). In this sense, primary institutions such as *concertación*, non-intervention, and other aspects of South American international society are fundamental for understanding the region: "Balance of power is very much ameliorated by the workings of other institutions such as collective power management, diplomacy and international law" (MERKE, 2014b, p. 179).

Power politics and potential tensions are seen in the region "particularly through still problematic dyads" (MERKE, 2014b, p. 183), such as Chile-Bolivia, Chile-Peru, Colombia-Venezuela, Peru-Ecuador and Peru-Bolivia. However, the patterns of interaction of the countries in the region towards Brazil exhibit dynamics of both

convergence and divergence and “therefore neither balance nor bandwagon has taken place in South America” (MERKE, 2014b, p. 183).

Theoretically, Buzan and Waever (2003) proposed two quite distinct subcomplexes regarding security dynamics, with Brazil as the link country between them. Brazil, due to its dynamics, makes the South American CRS remain as one, however maintaining the two subcomplexes (Andean and Southern Cone) quite demarcated both geographically and by their respective security dynamics. However, even with accentuated regional differences, several countries in the region adopt dualistic behaviour, in processes of military build-up along with cooperation.

Both the Andean and Southern Cone subcomplexes, in the analysis of Duarte-Villa and De Souza Pimenta (2016), present similar patterns regarding state threats and weaknesses, the permanence of traditional issues, such as internal and external security dilemmas, whether derived from political conflicts and domestic social or military investments in the Armed Forces. In this sense, for these authors, the separation between a subcomplex with more traditional security dynamics and militarized behaviour in the Andean countries and another that would approach a security community in the Southern Cone, “(...) doesn't make sense (...) since both are permeated by traditional behaviours that lead to traditional security dilemmas, even if these dilemmas are in the realm of representations about intentions”[44] (DUARTE-VILLA & DE SOUZA PIMENTA, 2016, p. 455).

South America is a region with very particular dynamics that involve, concomitantly, elements of conflict and cooperation, in the evaluation of Medeiros Filho (2010). Both the cooperative and the conflictual duality of both subregions can be contemplated with this author's proposal for a broader geographical notion of South America's security dynamics. As both integration and fragmentation movements coexist in both regions, Medeiros Filho proposes a division of the region according to two major arches: the “Arch of Stability” and the “Arch of Instability” - while the first would

[44] (...) não faz sentido (...) já que ambos são perpassados por comportamentos tradicionais que levam a dilemas de segurança tradicionais, mesmo que esses dilemas estejam no campo das representações sobre as intenções” (DUARTE-VILLA & DE SOUZA PIMENTA, 2016, p. 455).

correspond to the Atlantic strip (extended Mercosur), the second refers to the portion where potential areas of armed conflicts persist, notably “Amazonia” and “Andes”. (MEDEIROS FILHO, 2010, p. 65).

Source: MEDEIROS, 2010.

The levels of “geopolitical integration” in South America, according to Medeiros Filho, seem to obey a line of increasing gradation between the Atlantic vertex (greater level of integration / stability) and a Pacific vertex (compromised integration and regional instability) (2010, p. 65). Note that in this conception both Brazil and Chile are in both "arches", situated in both vertices.

The South American security complex has its own characteristics and dynamics, even if theoretical and empirical questions are raised about the variability and specificity of the two regional subcomplexes. From the theoretical point of view of RSCT, according to the Buzan & Waever (2003), South America constitutes a “security regime”. Medeiros Filho (2010) points out that this security regime was marked by a paradox: absence of wars and high levels of social violence, which are not homogeneous in the South American space.

The perception of threats and the potential for defence cooperation among the military personnel of countries in the South American region was assessed by Oscar Medeiros Filho (2010), who based on interviews with members of Armed Forces of the

countries of the region, came to the conclusion that there is a great diversity of perceptions about threats and about the meaning of regional cooperation and the strength model to be adopted, but the perception is positive about “regional peace” (p. 181).

With regard to the military's perceptions of what constitutes a threat to the security of South American states, with different degrees of intensity, in general there was a combination of factors, according to Medeiros Filho (2010), and the establishment of degrees of priority becomes an arduous task, in a mix between “classic threats” (usually a border problem with a neighbour), “internal threats” (armed groups that jeopardize the status quo of the State), “transnational threats” (related to all types of illegal activities) linked to international crime networks) and “extra-regional threats” (involving the possibility of war with a great power). “There is hardly a case where the military's concern refers only to one of the types suggested above” (MEDEIROS FILHO, 2010, p. 181).

The idea that international greed for the region's natural resources was one of the greatest threats to the security of South American countries seems to be growing among the military of the region as well, according to Medeiros Filho (2010, p. 183). This concern might be potentialized by instances such as a special report on the probable wars of the 21st century, where *The New York Times* listed the fight over natural resources, especially the dispute over the Amazon, as the world’s contemporary main source of tension. In the article *Why we might fight*, the newspaper points out that the international voracity for natural resources such as oil, the competition for minerals and coping with the effects of climate change are a fundamental concern of international defence and security to the United States government. According to the report, the US Military confirmed these issues represent a new source of conflict and have systematically become a new field of study in research centres, the Pentagon, and intelligence agencies. The Amazon rainforest was one of the hot spots for the outbreak of a possible world war still in this century, among other reasons, for access, control or protection of the biodiversity of the region; arable land and habitable areas; the largest hydrographic basin in the world (covering an area of 7 million km²), as well as its impact

on the maintenance of the global supply of oxygen, and the dispute over its water, pharmaceuticals, and mineral resources (NYT, 2012).

Still on the South American armed forces perceptions, Medeiros Filho (2010) considered emblematic the suspicion of military personnel in the region - mainly Venezuelans - about alleged United States' ambiguous intentions in the region. The regional cooperation processes (exemplified by the UNASUR CDS), for Argentina, may represent the overcoming of the "neighbour-threat" model, historically represented by the rivalry with Brazil and Chile; for Brazil, in addition to combating organized crime in the region, the South American union and "regional peace" are envisaged as a necessary condition for the country to exercise a role of regional leadership and projection in the International System; the Paraguayan and Bolivian military see in regional cooperation a possibility of access to defence resources; the Chilean, Uruguayan and Colombian military share more sceptical perceptions regarding the proposal for regional integration, which, according to Medeiros Filho, "suggests a certain' geopolitical isolation of these countries in relation to their surroundings" (2010, p. 184).

The notion of dialogue and elements of *concertacion* are present also among the military forces of the distinct South American countries. As Felix Martin (2006) demonstrated, there is a transnational confraternity among the military in South America. For the author, over the last decades in the region there is an increasing political power and autonomy of the military, which controls the war-making decision, changing progressively their mission from external to internal protection of the state. "With an ever-increasing stake in the national political process, the military became confrontational at home and peaceful toward the other regional national armies" (MARTIN, 2006, p. 181).

In South America, according to Martin (2006), there is a "militarist peace" where the soldiers and other members of the armed forces, tend to develop "similar values, beliefs, and principles that foster an increasing identification with the interest, progress, and success of the military institution in their respective countries" (p. 181). The armed forces play a direct role in the national political process in these societies, due to lack of effective civilian control over the armed forces. This process makes the armed forces

more concerned with internal threats, such as socioeconomic and political issues: “In a region such as South America where this phenomenon became generalized over a seventy-year period, the military of the region developed a sense of transnational identity or regional confraternity that enhanced the prospect for interstate peace” (MARTIN, 2006, p. 181)

Coping with transnational threats in South America requires effective cooperation and greater participation and involvement by various public security agencies - not the Armed Forces – in actions managed by the security agencies (national police, gendarmeries, etc.), in the analysis of Medeiros Filho (2010). Because these institutions are not “impregnated with national symbolism”, security agencies have more flexibility to advance cooperative security policies that could allow, for example, police forces to cross borders and enter the territories of a neighbouring country (MEDEIROS FILHO, 2010, p. 199-200).

In the assessment of Pablo Celi De La Torre & Wolf Grabendorff (2020), there is an imperative need for effective cooperation in the region, not depending on circumstances or political leanings of governments:

> “The construction of regional security demands inclusive and diverse cooperation mechanisms, with a strategic sense of community of States and not limited by the differences in the political orientation of the governments and the variable situations of the various government systems present in the region” (CELI DE LA TORRE & GRABENDORFF, 2020).

CONCLUSION

The argument of this chapter is that a comprehensive approach, avoiding the customary dichotomies and divergent assessments between Realists and Liberals, is required to understand the dual process of militarization and defence cooperation in South America. Both scholars and policy makers might benefit from the holistic, informed by long term historical aspects, provided by the English School of IR.

Diplomacy, international law, the defence of sovereignty, territoriality, elements of balance of power, militarization, all compose a reality which, depending on contexts, might accentuate some of these elements of South American international society, in detriment to others. However, these are all in play in the South American region and scholars and policymakers alike benefit from holistic approaches.

Shifts in definitions of threat and conflictual perceptions, such as the recent documents announced by Brazil, might generate more instability and conflicts, rather than produce peace and stability. The modernization of the military and arms build-up and the responses given by South American countries to security and defence issues have the potential to generate misrepresentation, requiring that policy makers and scholars alike consider the theoretical and empirical "canvass" of the South American international Society institutions, which enables - and restrains - both conflicts and also deeper cooperation.

In 2009, Andrés Malamud already diagnosed that the region was heading towards growing divergence and fragmentation rather than convergence and integration (MALAMUD, 2009). More than a decade later, one could argue that those tendencies might have only grown, since there is more political and ideological divergence between governments of the region, coupled with economic crisis and downturn.

Brazil's foreign policy, the largest country in the region and with greater power to stimulate cooperation and integration, is adrift, in Bolsonaro's government (COSTA LIMA, BRAGATTI & BORGES, 2017a; 2017b). As Carmen Fonseca (2018) pointed out, between 2011 and 2016, in an international environment of economic crisis and strong domestic political instability, with the consequent impeachment of President Dilma Rousseff, there was a "downward curve of Brazil's international protagonism" (p. 14). Even in its best moments Brazil leadership faces regional resistance, in what Malamud very aptly called a "leader without followers" (2011).

These issues are profound and deep-rooted in the region, where the relationship with cooperation, regionalism and integration is quite paradoxical, as Gardini defines: "Latin America is divided between a rhetorical, almost theatrical, support for continental

solidarity and integration and a strong, practical preference for national sovereignty and interest, accompanied by a traditional aversion to supranationality" (GARDINI, 2011, p. 250).

CONCLUSION

One of the main arguments, both on theoretical and empirical grounds, of this dissertation is that the primary institutions of the South American international society simultaneously stimulate, while also restrain, both war and conflicts and deeper cooperation and peace. The aim was to understand the underlying elements of these processes, with a holistic approach.

The contribution of this work was to explore the potential of English School (ES) to, not only describe and explain the cooperation processes in defence and militarization of the South American region, but to provide some elements for the understanding of deep-rooted, *longue-durée*, of the norms, traditions and the practices of the continent. In doing so, we tension the approaches that emphasize only elements of peace and cooperation (and security community), as well as approaches that focus on conflicting and aspects of instability.

The English School provided, in this analysis, elements for overcoming the divisive approaches expressed by strict adoption of Realist, Liberal or Constructivist concepts and frameworks, especially by the way the ES approaches the institutions - with special attention to the "primary institutions" - of this region. More than a geographical concept, the South American region can be considered from its practices, identities, interests, history and common values, and as a common political effort (as in the case of the institution of UNASUR, for example, or other initiatives to come).

The primary institutions of international society, such as sovereignty, territoriality, balance of power, international law, diplomacy, nationalism, great power management, are key to approach the processes of securitization, as Buzan indicated, and this is visible in the South American context. The agenda of international security of the region is impacted strongly by sovereignty, territoriality, nationalism, as "these institutions might define and frame the discourse of security and might become the referent object for the process of securitization" (BUZAN, 2010, p. 41).

Diplomacy, international law, the defence of sovereignty, territoriality, elements of balance of power, militarization, all compose a reality which, depending on contexts, might accentuate some of these institutions, in detriment to others. However, these are all in constant play in the South American context.

The South American international society expresses the ambivalences and paradoxes specific to this region and are reflected in the practices and theoretical-conceptual aspects of security and defence. Paradoxes are expressed in empirical and theoretical terms in the processes of militarization, tensions and conflicts, in addition to being manifested in concerted and cooperative efforts, which are both stimulated and limited by institutions such as sovereignty, diplomacy, international law, balance of power, great power management, *concertación*, among others.

We share with Merke (2014) the diagnosis that diplomacy has been a central discourse and practice in the history of South America, which represents "a complex repertoire of formal and informal mechanisms to channel conflict within a framework of agreed norms and rules, namely non-intervention, *uti possidetis*, and peaceful conflict resolution" (MERKE, 2014, p. 78). And we also share the proposition by Merke to add three "particular derivative institutions from diplomacy", which the author considers to be *concertación*, hemispheric organization, and regionalism.

We found elements and discussed the importance of *concertación,* "a unique institution of South America" defined "as a loose form of international organization based on consensus-seeking and peaceful settlement of disputes" (MERKE, 2014), and others, such as sovereignty, great power management, regionalism, along with diplomacy, which are all very present in the last few decades and in contemporary tensions and disputes which could destabilize the peace and security of the region.

The South American security complex has its own characteristics and dynamics, even if theoretical and empirical questions are raised about the variability and specificity of the two regional subcomplexes. From the theoretical point of view of RSCT, according to the Buzan & Waever (2003), South America constituted a "security regime": this

research confirms that, twenty years later, the situation did not improve (and even show signs of deteriorating in terms of international security).

Already in 2010, Medeiros Filho pointed out that this security regime is marked by a paradox: absence of wars alongside with high levels of social violence, which are not homogeneous in the South American space. That diagnosis, too, remains all too visible. The region is still regarded as a region with low interstate conflict concerns, however, state to state conflicts and tensions are still relevant, as seen in several instances, such as long-standing territorial contests and areas in dispute; sub-regional balances and instabilities; militarization and rearmament of many countries in the region. In addition, as many scholars indicate, the issues of "intermestic" security such as threats from non-state (organized crime) and sub-state military forces (such as paramilitaries), drug trafficking and transnational criminal gangs with ramifications throughout the region, are a local, international and global concern.

The tension between military concerns and definitions of threats reflect more unresolved social problems and lack of state capacity to confront domestic and transnational conflicts and violence and also its failure to cooperate with neighbours, which could make South America a real security community.

The deactivation of a unique, in the regional scope, forum for consultations, exchange of information and coordination of joint responses in matters of defence and conflict resolution, such as the CDS (even with all its problems), was a *mistake* for the region, which now moves backwards and experiences more uncertainties and where that same trust and friendship, build over time and with effort, between peoples can, through miscalculation, misinformation or malice, more easily be undermined.

The widespread violence and the criminal groups, drug cartels, arms trafficking, represent a challenge for the countries in the region, and are a global concern, as Merke (2011) indicated, an assessment corroborated by this research. Although adopted by the countries in the region, international standards such as democracy and human rights are poorly enforced or ineffective, as Merke indicated. Conflicts and disputes between gangs for control over contraband, narcotraffic, illegal mining, combine with corruption,

weak public and ineffective institutions and local and regional security services, all of which not only contribute to the high levels of violence across the region and are an international concern, especially when combined with highly organized armed groups, as the author reminded us, which resonates with the several authors and issues that we also indicated in this research. Coping with transnational threats in South America requires effective cooperation and greater participation and involvement by various public security agencies - not the Armed Forces – in actions managed by the security agencies, such as national police and others.

Contrary to the interpretation of International Society as the realm of only peace and dialogue, in the English School approach, balance of power and war are central to the analysis. Levels of conflict or cooperation, as Alderson & Hurrell stressed, occur against the backdrop of multiple shared institutions, of a common framework of rules and social norms, where power and conflict might play a major role in international relations. Military build-up and the strong defence of sovereignty might be some of the most visible conflictual elements of the South American international society.

In 2003, Buzan & Waever (2003) considered the configuration of RSC in South America as a constituting a "security regime" (situated in an intermediate level between “conflict formation” and “security community”), and found that its main security dynamics “predates, continued during and still exists after the Cold War” (p. 309). Almost 20 years later, this research found that the agenda of issues, divisions and tensions in South American international security remains much the same (and we do hope it will not become more belligerent and violent), even while the region has undergone profound changes and made strides in the area of international security and cooperation in Defence in recent years.

While new arrangements and institutions were created and developed, such as the establishment in 2008 of the South American Defence Council (*Consejo de Defensa Sudamericano*, or CDS), the sources of division and tensions, such as differences in threat perceptions, tensions over democratization and economic integration, “the same obstacles that plagued the development of a consensual regional security agenda during

the 1990s (...) are now on the agenda of the new regional security institutions" (TRINKUNAS, 2013, p. 85).

The data analysed (academic and NGO reports, documents, news clipping, along with scholarly works) and the adoption of the approach of the English School have tensioned the model of the South-American RSCT as it was proposed in 2003, where Buzan and Waever divided the region into two regional subcomplexes: 1) the Southern Cone – Brazil, Argentina, Uruguay, Bolivia, Paraguay and Chile – pointing towards a security community; 2) the Andean – Colombia, Venezuela, Ecuador, Peru, Suriname and Guyana – which presents a conflictual and unstable situation, aggravated by transnational security problems (such as drug trafficking). We found that this division, while absolutely valid and up to date, might be taken with a more nuanced view, since even after almost 20 years, as Villa aptly has shown, some countries adopt dualistic behaviours.

In this work we demonstrated the deep historical tension between integration vs fragmentation; the almost obsessive pursuit of autonomy by the nations of the region – not allowing supranational bodies or efforts to function and override their authority. Also, the focus on diplomacy and presidentialism; the *concertación,* with the tendency to opt for processes based on consensus-seeking and peaceful settlement of disputes, based on largely historical constructs such as the adoption of *uti possidetis*, the principles of non-aggression, non-intervention and international arbitration.

The CDS of UNASUR, as well as other South American regionalist processes and throughout Latin America, followed an intergovernmental model of association, where sovereign states are the main actors in the formulation and implementation of these same processes. States thus seek to maintain, above the regional vision, the national interest and the preservation of national sovereignty. In this sense, the findings of this research agrees with the analysis made by Zanatta (2010), that centripetal and centrifugal forces have always punctuated and continue to mark the movement of Latin American history. There are the strong and recurrent impulses to cooperation and integration, to political unity and spiritual communion, but on the other, equally or even stronger and recurrent, the reasons for fragmentation remain.

South America continues to face not only (historical) tensions over border disputes and dyadic rivalry, but internal social and political problems and some of the highest numbers of internal violence and public insecurity. The primary institutions of South America reflect the paradoxes and ambivalences of the societies and the States that compose the region. Only by acknowledging and confronting these paradoxes, which elements are important to keep and stimulate and which ones are obsolete and ineffective (or plain violent and unfair), the region can move towards more just and peaceful societies and their surroundings.

It is not clear what kind of model of economic development, justice, democracy, environment protection, human rights, the role of police and the military, equality, access to social and basic needs, regional and global insertion and many other issues these societies are (or will be) adopting (or this is one of the main struggles, and their effects are wide open for anyone to see). Societal, political, cultural, economic and ideological divisions persist and in some cases are being aggravated by economic and political crisis and technological advances, populism, domestic, regional, transnational and global challenges.

Contrary to other regions of the world, such as Europe, the United States (even with all its problems and contradictions), where major wars and social revolts made these societies confront some of these problems, the region faces the ideological and political clash between models of authoritarian, patrimonialist, populist, unjust and violent societies (be it of right or left political leaning) and more inclusive, democratic, egalitarian, pluralist and open models of societies. Even if labour unions and other associations might see some integrationist efforts with suspicion at certain periods, it is more likely, as Sanahuja (2009) very aptly reminds us, that often nationalistic anti-integration attitudes have been an ideological alibi for national elites against international institutions that might limit their influence on governments and act contrary to private interests. If this underlying struggle and tensions are unresolved, processes of regionalism and regional integration will keep being formed, only to fail, fade or disappear sooner or later.

The strengthening of police forces or even their replacement by Armed Military forces in certain activities has been an increasingly frequent trend in Latin America, reflecting the uncontrolled growth of violence and crime that seems to overcome the public security resistance. This process leads to the deprofessionalization of the Armed Forces, with no effective results.

The process of modernization of the military and arms acquisitions, as Battaglino and Villa indicated, by some important countries in the region provide conditions for the resurgence of mistrust or misrepresentation of neighbours in relation to the countries that lead this build-up. And, as the author stresses, this process is complicated by the fact that these are accompanied by simultaneous and contradictory movements: one that signals towards traditional security and militarization and another towards cooperation and generating confidence.

The notion of dialogue and elements of *concertación* are present also among the military forces of the distinct South American countries. The experience shared among several South American nations in sending troops to peacekeeping missions for the United Nations was used as a factor to potentiate the exchange of information and confidence measures among the countries of the region.

The implementation of joint military exercises, several of them underway or carried out periodically for years, the consensual disclosure of expenditures and military budget, the disclosure of the "defence white papers" of each country and the integration and development of some joint projects in the defence industry, are examples of how cooperation in defence in the South American continent has the potential to profoundly continue to develop. Several efforts and processes of cooperation existed before or were created alongside, overlapping or competing with the CDS of UNASUR, and continue to develop their course.

The modernization of the military and arms build-up and the responses given by South American countries to security and defence issues have the potential to generate misrepresentation, requiring that policy makers and scholars alike consider the theoretical and empirical implication of their analysis and prognostics.

The themes of cooperation in defence and militarization, along with a variety of themes of the large area of Defence and Security Studies, are well studied and have been growing vigorously in quantity and quality in the last decades - with important developments such as the creation, in 2005, of the Brazilian Defence Studies Association (*Associação Brasileira de Estudos de Defesa* - ABED), and in 2001, the RESDAL – *Red de Seguridad y Defensa de América Latina.*

The epistemic community in the area of international security and defence in South America is highly skilled, vibrant and conscious of its social responsibility, as Vitelli has demonstrated, and *must* be respected and listened to, along with the participation of all sectors of civil society, as in any real democratic region.

The primary institutions of International Society are very visible and active in South America. Sovereignty, diplomacy, international law, balance of power, great power management, *concertación* are all components of this mosaic, the "canvass" of the South American international Society institutions, which enables while also restrains - both conflicts and deeper cooperation.

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