

“HAVE WE MISSED THE CHINA ‘FACTOR’?”: EVIDENCE FROM BRAZIL AND MEXICO

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ABSTRACT

China’s rapid economic growth created new challenges and opportunities to Latin America. Much ink has been spilt analysing how countries in the region surfed the Chinese wave of commodity-based prosperity. There is fertile and quite unexplored territory, however, to analyse how these regional powers in the Global South, from a comparative perspective, have interacted with China as they tried to improve their international position over the 2000s. We analyse in this article how Brazil and Mexico dealt with China’s presence and strategic goals in Latin America and assess the outcomes they extracted from this relationship. We draw evidence from and offer comparisons across at least two presidencies in each country (Lula and Rousseff in Brazil, and Fox, Calderón, and Peña Nieto in Mexico) over the 2000s, which allows us to grasp the variation in ideological, governance style, and electoral legitimacy. We ground our theoretical framework in the concept of international insertion, a Southern-based framework that opens space to understand and explain how countries in the South behave in international politics from a different point of view. We claim that the efforts made by national governments in both countries to improve their positions achieved limited or transitory results—in particular if read in light of China as a strategic factor.

Keywords: Brazil; Mexico; China; Latin America; international insertion; emerging powers.

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“HAVE WE MISSED THE CHINA ‘FACTOR’?”: EVIDENCE FROM BRAZIL AND MEXICO

China’s rapid economic growth created new challenges and opportunities to Latin America (Denoon 2017; Myers and Wise 2017; Wise and Ching 2017). Much ink has been spilt analysing how countries in the region surfed the Chinese wave of commodity-based prosperity. Wei (2019) offers an interesting novel angle by comparing the differences between the cases of Brazil and Mexico to explain variations in how successful China was in achieving its strategic goals in Latin America. He notes that China’s relations were more consequential with Brazil than Mexico, both economically and politically. There is a fertile and quite unexplored territory, however, to analyse how these two major regional powerhouses, from a comparative perspective, have interacted with China as they tried to improve their international position over the 2000s.

In this article, we analyse how Brazil and Mexico dealt with China’s presence and strategic goals in Latin America and assess the outcomes they extracted from this relationship. We claim that the efforts made by national governments in both countries to improve their positions achieved limited or transitory results—in particular if read in light of China as a strategic factor. Besides structural and contextual limitations posed by their semi-peripheral positions, their success was constrained by the inconsistency of national policies, capital, institutional, and technological deficits, and their failure to understand and strategically act upon China’s growing centrality to the future of the international order.

To show how structural and contextual limitations posed by their semi-peripheral positions constrained the results achieved by both countries, we ground our theoretical framework in the concept of international insertion, a Southern-based framework that opens space to explain how countries in the South behave in international politics. By insertion, we mean the efforts to combine foreign, economic, and defence public policies to seek recognition and alter their status in the international system. We draw evidence from and offer comparisons across at least two presidencies in each country (Lula and Rousseff in Brazil, and Fox, Calderón, and Peña Nieto in Mexico) over the 2000s, which allows us to grasp the variation in ideological, governance style, and electoral legitimacy.

Our contribution advances theoretically and empirically on how regional powers in the South have related to China, by analysing in a comparative perspective, how Brazil and Mexico failed to strategically engage with the country. By focusing on the perspectives of Southern countries, we shift the usual narrow theoretical framework focused on Northern priorities and ideas, to an explanation of the different preoccupations and ambitions towards the international order Southern countries hold. Our findings show how China is particularly important to study Latin America’s—and more broadly, Southern—insertion due to its dual condition and strategy: as a developing country acting as part of the South, and as a great power with gatekeeping behaviour.

The remainder of this article is divided into six sections, plus a conclusion. The Chinese presence in Latin America works is our starting point, a *datum* we briefly review, highlighting its economic and strategic objectives. We turn next to our conceptual framework, drawing on the idea of international insertion to frame how Southern countries’ international ambitions differ from those in the North. In sections three and four we analyse the international insertion strategies of Brazil and Mexico, factored into three key areas (economic interactions, diplomatic relations, and defence and security cooperation). These function as general interpretations of how each country attempted to build agency spaces over the 2000s. In section five we assess how Brazil and Mexico played the ‘China’ factor in their respective insertion strategies. The final section weighs our dependent variables and presents evidence of how Brazil and Mexico missed China as an opportunity to build space agency and obtain recognition.

China in Latin America

Following the *Go Out* policy introduced in 1999, and its accession to the World Trade Organization (WTO) in 2001¹, China used its foreign reserves, investment capacity, and domestic market opening to sustain a course of unprecedented economic growth. China's growth fuelled a massive demand for goods, services, and natural resources on a global scale (Friedberg 2018). Regarding Latin America, Beijing adopted a careful approach to its economic and diplomatic relations with the region. On the one hand, China avoided interfering and being too exposed to the internal situation of each country —as in the case of Venezuela (Kaplan and Penfold 2019). On the other, it did not significantly increase security cooperation with Latin American countries.

Trade with Latin America and the Caribbean (LAC) increased 22-fold between 2000 and 2012, going from USD 12 to over USD 270 billion. In 2018, China was the second trade partner for the entire region, the first for Brazil, and among the top three trading partners for Mexico. In financial terms, China became an increasingly important source of capital: by 2015, Chinese sovereign lending had increased to USD 29 billion, nearly twice the combined figure of all the Western multilateral development banks. In 2016, the total stock of Chinese Outflows of Foreign Direct Investment (OFDI) destined to Latin America was USD 207.1 billion —15.26% of the Chinese OFDI stock in the world. PRC's originated foreign direct investment in the region increased from USD 35 billion in 2003 to USD 129.83 in 2018 (Dussel 2016; Myers and Gallagher 2019; Myers and Wise 2017; Wei 2019).

Under Hu Jintao (2002-2012), China significantly expanded its engagement with Latin America. These trends have continued under Xi Jinping (2013-), even with worse global conditions. China released in 2008 its first official policy on Latin America pledging to strengthen the cooperation with the region. In 2009, alongside Brazil, Russia, and India, the country formally initiated what would become the BRICS Forum (South Africa joined the group in 2011). Similarly, China signed Free Trade Agreements (FTAs) with Chile (2009) and Costa Rica (2007) and upgraded its bilateral relations with Brazil (2012) to the status of global strategic partnership. Since 2013, new diplomatic relations have been either established or upgraded². In 2018, out of 66 PRC's strategic partnerships in the world, 10 of them had been signed with countries in the region³. Following the creation of the Community of Latin American and Caribbean States (CELAC) in 2011, the China-CELAC Forum for dialogue and cooperation was founded in 2015. Beijing issued in 2016 a second policy document to guide its relations with Latin America. In June 2018, members or prospective members of the Asian Infrastructure Investment Bank (AIIB) included Argentina, Bolivia, Brazil, Chile, Ecuador, Peru, and Venezuela.

One common explanation for both the success and the limits of China's relation with Latin America interprets it as a Chinese decision to not provoke the US. The American hegemony argument is incomplete to explain China's behaviour towards the region or Washington responses to it (Long 2018). It misses the point by treating countries in the region as if they lack agency⁴. What is more, China indeed did not (and does not) pose a military challenge to the US in Latin America (Ellis 2018). Tokatlian (2018) argues that no extra-regional power has a military presence comparable with the US South Command, its array of bases and across the board security cooperation arrangements (over 75) through various institutions. Despite Washington's comfortable security position in the region, China

¹ See also China (2008; 2016).

² With Panama, Dominican Republic, and El Salvador for the former, and with Mexico, Argentina, and Costa Rica for the latter.

³ Brazil (1993), Venezuela (2001), Mexico (2003), Argentina (2004), Peru (2008), Chile (2012), Costa Rica (2015), Ecuador (2015), Uruguay (2016), and Bolivia (2018)

⁴ For instance, Latin American governments with distinct political orientations pursued post-hegemonic multilateral initiatives not including the US (see Riggiozzi and Tussie 2012).

was labelled its major threat in the hemisphere since 2016 due to global factors, not because of actual interactions in the region (Cepik 2019).

In a similar vein, Urdinez and his colleagues (2016) argue that the effect of US hegemony on Latin America's trade with China is smaller than in the realm of investments. Dussel (2017) shows that trade was potentially affected: between 2001 and 2014, about 72% of US exports to Latin America and the Caribbean were under competitive pressure from China. Such pressures notwithstanding, Koleski and Blivas (2018, 28) demonstrated that Washington has not displaced by Beijing at the top of economic relations with the region. In 2016 the US was the largest export market for 20 countries in Latin America and the Caribbean and the second largest for another seven. Much in the same way, over 45% of LAC's total exports went to the US. China was the largest export market for three countries and the second largest for just one more. Only 9% of LAC's total exports went to China. The US share of total LAC's imports was 32%, and China responded to 18% of total LAC's imports in 2016. The distance between the first (US) and the second trading partner (China) for the entire region is thus apparent.

In sum, Beijing has behaved towards Latin America as part of its global development strategy and became one of its major economic partners—even though Chinese figures have not surpassed US ones—with a conscious choice to avoid to cross what Washington considered as red lines—i.e. strategic and military engagement with countries in the region. From the evidence hinted above, it is compelling to agree with Wise and Ching (2017) in refuting a hawkish interpretation of China's presence in Latin America (Mearsheimer and Walt 2016). China was neither prevented by the US dominant position in the region nor it has aimed at or caused this position to be structurally altered (Cepik 2019). The United States may have been a factor in Mexico's or Brazil's decisions regarding China, but it was not the sole factor. As hinted above, our interpretation of China's role in Latin American escapes the deterministic view of mainstream IR theories. Our conceptual framework—to what we turn next—allows more theoretical space for additional variables to explain how and why Brazil and Mexico used—or failed to use—Chinese presence in the region to change their positions in the international order.

A concept to understand international relations from the South

Mainstream IR theories give scarce attention to how those in the South attempt to better position themselves within the international order. The differences between central and peripheral countries' development levels, ambitions and concerns put aside any type of inquiry about how peripheral nations could engage with and participate in international decision-making. Further, the premise of a correlation between might and achievements forced Southern states to compare their results with the North and not to the process of agency creation itself (Chagas-Bastos 2018). The creation of agency spaces is relational and takes place when countries are able to cooperate to build institutions, coalitions, alliances and bilateral or multilateral negotiations. Some branches of public policy—defence, economic and foreign policies—are more directly related to such efforts. Even without hierarchising or analysing the interaction between each of them, we assume that the interaction of all three among them and with other countries are causal to the international insertion of a country.

The mainstream baseline premises are troubling because they assume that Southern and Northern countries hold the same international ambitions and behaviour patterns. Russell and Tokatlian (2015) argue that it would be more appropriate to speak of a general 'logic' (autonomy vs acquiescence) rather than of grand strategy to grasp how Southern states behave. They pinpoint that Southern logics may oscillate, be less consistent across relevant areas of public policy, and rarely codified into comprehensive official documents. This has led to Southern countries' demands being misattributed and treated as a search for status in international politics. As Adler-Nissen and Zarakol (in press) pinpoint, the problem with mainstream interpretations IR of the 'rest' is ontological: they

assume that oscillation derives from international *or* domestic factors. In fact, when peripheral countries claimed more active and pre-eminent roles as they integrated into the global productive and financial chains, “the domestic/international distinction ceases to be as meaningful as it was in the last century” (Adler-Nissen and Zarakol in press).

To clear up the confusion about the different interpretations about Southern and Northern countries’ ambitions and actions, Chagas-Bastos (in press) argues that peripheral and semi-peripheral states need to perform a previous necessary movement to those countries attempting to transition from the condition of one who seeks to be recognised as part of, to one who is admitted as possessing and capable of seeking status within the contemporary international order. In order to perform such movement decision-makers in Southern capitals make efforts to combine foreign, economic, and defence public policies efforts towards abroad in a coordinated whole to create agency spaces⁵ — transcending the (almost) exclusively economic and material catch-up focus of previous decades. Due to its hybrid nature, these policies are combined in a process of social decoding, feedback, and redefinition among them. Social decoding is understood in this context as the process of translating national interests in light of international contexts —paying attention to its constraints and opportunities. Eventually, the success or failure of international insertion hinge on how governments and bureaucracies interpret such contexts and project their insertion strategies abroad.

These are what Chagas-Bastos conceptualises as *international insertion* and its analytical framework —i.e., factoring foreign, economic, and defence policies towards abroad, in light of the ideas, interests, and institutions embedded in them. As hinted above, the concept addresses from a Southern perspective the preoccupations and ambitions towards the international order peripheral and semi-peripheral countries hold. Grounded on this framework, we explore panoramically in the next two sections the efforts Brazil and Mexico made to broaden their margins of manoeuvre within the international order. These efforts can be evaluated in light of its inter-temporal consistency and congruence between the vectors represented by the economic, foreign, and defence.

Brazil’s attempt to global prominence

Throughout the 1990s and 2000s, Brazilian leaders worked to insert Brazil in the global governance decision-making group. As part of broader development ambitions, the country persevered for some years in a strategy to expand its agency spaces and obtain recognition. More recently, inconsistencies between economic, foreign and defense policies, as well as differences between elites in the social decoding opportunities and risks, have weakened Brazil's international insertion efforts. The 1988 Constitution democratic pact was the cornerstone of the historical quest for development and its break-up in 2016 has provoked deep changes in Brazilian insertion options and strategy.

The country’s competitive political landscape between Cardoso (1994-2002) and Lula (2003-2010) did not prevent some continuity and allowed innovation (Paes and Martins, 2015; Rodriguez 2012). Brazil's international engagement under Cardoso and Lula adopted presidential diplomacy as its *modus operandi* to position the country within global hierarchies (Borges and Chagas-Bastos 2017; Lima and Hirst 2006). Dilma Rousseff took office in 2011 aiming at deepening the social reforms initiated by Lula. The conflicts associated with Rousseff’s temper and resistances to her development agenda was the tone of her first tenure, leading to her re-election in 2014 by a narrow margin. Complicating matters further, business elites proved more than reluctant to respond to Rousseff’s attempts to revive the economy through fiscal incentives and disbursement. By 2015, a deep economic slowdown, a broad coalition of centre-right political forces (including former allies), middle-class demonstrations, business elites’ dissatisfaction, and acutely polarised institutions

⁵ Agentic spaces are the locus where actions take shape in international relations —i.e., be them institutions, coalitions, alliances, bilateral or multilateral negotiations, among other forms of political and economic interactions.

cornered her government. Since Rousseff's removal from the presidency via a controversial impeachment process in 2016, Brazil has entered a new political phase in which political and economic crises feedback (Anderson 2019; Singer 2018). We briefly examine next the three insertion vectors of Brazilian insertion: economic, foreign, and defence policies.

The insertion economic vector received special attention under Lula. He started an unprecedented level of support to the internationalisation of Brazilian national champions policy, i.e., companies in the sectors of oil, minerals, construction, and animal protein. The initial success of such initiatives was facilitated by the high prices of commodities and the low global interest rates for much of the period. These made possible that Brazilian companies extend their operations to South America, Africa, China and the United States, and borrow strong currencies abroad to expand their export-oriented (not necessarily in lieu of, but usually aligned with) domestic-market focused activities. It should also be noted that the economic success under Lula was partially based on prolonged exchange rates overvaluing the Brazilian Real (Moreno and Segura-Ubierno 2014). The counter-cyclical measures to contain the 2007-8 economic crisis in the Brazilian economy — consisting of tax exemptions to the industrial sector, interest loan reduction, comprehensive social policies and an aggressive public works agenda— were unable to prevent an economic slowdown after an abrupt decline in investments and commodity prices in 2014 (Boschi and Pinho 2018).

On the foreign policy side, Brazil diversified its partnerships. Under Lula, Brazil deepened its involvement with South America and expanded its presence in new regions, such as Africa and the Middle East. At the same time, Brazil developed new ties with other regional powers, in particular within the Global South (Burges 2009; 2017; Fonseca 2017; Ioris 2011). Brazil has fostered its cooperation with emerging economies, especially through new multilateral initiatives, such as the IBSA, BRICS, and the G20 (Milani et al. 2014; 2017; Stuenkel 2015). In the case of South America, regional institutions have proven to lack enough resources and political background to survive the test of an increasingly polarised situation. Rousseff deemphasised the relevance of diplomatic assertiveness (Chagas-Bastos and Franzoni 2019; Reis da Silva and Pérez 2019). Her foreign policy approach fulfilled the constitutional requirements with little innovation, given that her second tenure was defined by acute political and economic crises.

The security and defence vector of Brazilian insertion strategy varied over the period —but were largely guided by the principles of the 1988 Constitution (development, non-intervention, peaceful settlement of disputes, and repudiation of terrorism and racism). Cardoso administration placed emphasis on the search for recognition via adherence to multilateral agreements (e.g., Nuclear Non-Proliferation Treaty), and via participation in multilateral institutions (e.g., the United Nations Security Council [UNSC] and the Commission Hemispheric Security Committee of the Organization of American States). Lula made efforts to build new capabilities and to cooperate with new partners. There were investments in naval (with France), aerial (with the Swedish Saab and the US Boeing), and land equipment modernisation. For the first time, a Southern country was given the leadership of a peacekeeping mission —the MINUSTAH in Haiti. At the national level, the Armed Forces were used more and more in law and order operations (Cepik and Licks Bertol 2016). At the multilateral level, the UNASUR Defence Council and the BRICS ministers of security and defence forum must be highlighted (Lima et al. 2017). During Rousseff years the insertion defence vector followed its economic and diplomatic counterparts. Still, the security of major events (the World Cup and the Olympics), cyber threats, deficits in the space sector and maritime security stood out on the 2010s Brazilian agenda (Duarte and Kenkel 2019; Vaz et al. 2017).

Mexico's tight margins of manoeuvre

Mexico has oscillated between being embedded dependent on the US and attempting autonomous patterns of development and international insertion. One could speak more of a spiral path of desired independence while deepening ties with the US given the recurrent patterns in which

these options have repeated themselves since the 1980s (González 2001; Lajous Vargas 2012). Various Mexican governments have pledged since the mid-1980s debt crisis to curb the country's economic dependence on the United States. Later in the 2000s, Presidents Fox (2000-2006), Calderón (2006-2012), and Peña Nieto (2012-2018), even though coming from different sides of the political spectrum⁶ maintained the same course of action while attempting to diversify established economic partnerships. In short, there was a general alignment, despite the party in power, with the tenets prescribed by the Washington Consensus (Garza Elizondo et al. 2014; Ros 2015). Similar to the Brazilian case, inconsistencies between economic, foreign and defense policies, have weakened Mexico's international insertion efforts. The marked contrast with Brazil, however, draws on two key factors. Firstly, the intensity and frequency of such oscillations in Mexico, as hinted above, were lower than in Brazil. Secondly, whereas Brazil reduced its insertion efforts under Rouseff and Temer, Peña Nieto finally understood that it was at least necessary to attempt to engage with China. We review below each of the factors in Mexico's insertion.

The underlying rationale for Mexico's economic insertion vector, in particular between 2006 and 2018, aimed at opening markets and to take advantage of closer economic integration with the US market via NAFTA. This strategy would not only help Mexico to address the severe financial and productive hurdles the country faced but also (at least) maximise untapped economic opportunities —by attracting foreign direct investments and technological innovation. Even though the latter turned out to be true across the 2000s, this trend was not trouble-free: between 2008 and 2012 Mexican economy contracted 7% —with worse rates than during the mid-1990s recession (World Bank 2020). Peña Nieto failed reform attempts in the public education system and the energy sector frustrated Mexican hopes of sustained growth —resulting in shallow levels of public approval (with the lowest level of 12% in January 2017; Somuano 2018) that fed mounting opposition.

On the foreign policy vector, Fox aimed to expand Mexico's leeway within global hierarchies. But the so-called Castañeda Doctrine ended up deepening Mexican dependence on the US (Sandoval 2008). The low legitimacy of Calderón's winning ticket in the presidential election of 2006 crippled his own international insertion strategy (Bastidas 2012; Covarrubias 2013; 2014; Garza Elizondo et al. 2014). Calderón concentrated then on the symbols of being the host of multilateral negotiations. First, the global negotiations regarding climate change under the COP16 took place in Cancun, in 2011. Second, he was an eloquent host to the G20 Los Cabos Summit in June 2012, defending the global trade, open markets, and reductions in global protectionism. Under Calderón, Mexico maintained a high degree of coincidence with US positions in the International Monetary Fund, the United Nations General Assembly, and the World Trade Organization (González and Velázquez 2014). What is more, bilateral relations with the US have focused since the 2000s on trade liberalisation, immigration, remittances, and drug trafficking (Castañeda 2011). In the end, rather than being able to diversify Mexico's insertion away from the United States, Calderón repeated Fox's outcome: once more entangling Mexico with its wealthier and more powerful neighbour.

Migration issues were the dominant agenda-setting to the security and defence vector of Mexico's insertion strategy under Fox. The campaigning to reform the US immigration policy was frustrated after the new Security Border Initiative, and other securitising measures adopted by the US after the September 11 events. Even though Mexico did not support the Iraq invasion in 2003, the focus continued to be the tense cooperation with the US regarding border control and illegal drug trafficking (Benitez 2008). The agenda, however, was mainly concerned with security issues (Hussain and Schiavon 2013).

The South American drug cartels turned Mexico into an important cocaine transit route to the US market and the Mexican cartels engaged in violence to dispute territory and profits. Calderón seized the opportunity to intensify the use of police and armed forces and to refocus its relations with

⁶ Fox and Calderón are members of the PAN (National Action Party), and Peña Nieto comes from the almost centenary PRI (Institutional Revolutionary Party).

the US around the Merida Initiative (Lucatello 2009; Velázquez Flores and Lallande 2009)⁷. With this shift, US decision-makers conflated drug-traffickers to terrorists, but the policies pursued failed to curb cross-border drug trade or the smuggling of illegal guns (Villa et al. 2015). On the contrary, the levels of violence increased both internally in Mexico and, to a lesser extent, across the more than 3,000 kilometres border. Under Calderón, the official numbers for homicides rocketed from 11,806 to 21,824, plus thousands of disappearances and human rights violations (Bergman 2018). Peña Nieto attempted and failed to bring down violence while reducing direct military attacks to drug-trafficking organisations and drug shipments (Ramírez Meda and Rochin Aguilar 2017). Trump's aggressive policy against immigrants (Mexicans and Central Americans) has weakened cooperation between the two countries; it has not made, however, the Mexican government to modify its insertion strategy on security and defence issues in any significant way (Chabat 2019).

How have Brazil and Mexico played the 'China' factor?

China became one of the most decisive factors shaping Brazil's economic insertion vector. The total trade flow between Brazil and China rose 43 times in 18 years (from USD 2.3 billion in 2000 to USD 98.9 in 2018; Zhou 2019). In 2009, China became Brazil's largest trading partner, the total flow was USD 36.1 billion. In 2012, China was the destination of 30.3% of the Brazilian exports, and the source of 24% of its imports (Ramanzini Jr and Ribeiro 2013, 168). There is an observable trend of surplus for Brazil in bilateral trade. Brazilian exports to China grew 3.5% in 2018, with a trade balance surplus growth of 1.6% due to an increase of volume and value of major commodities (Ray and Wang 2019). Bilateral economic relations intensified in the last decade due to robust Chinese investments and financial agreements. The stock of Chinese direct investment in Brazil went from USD 326 million in 2005 to 57.9 billion in 2018 (Hiratuka 2019). The flow of Chinese investments from 2000 to 2010 was primarily concentrated in the commodities sector (oil, minerals and soybeans), and until 2014-2015, the investment profile has changed to the industrial and service and financial sectors (Xu 2017). In 2018, China invested USD 3 billion in Brazil, 66% lower than the 8.8 billion registered in 2017 (Cariello 2019).

The relative decline in Chinese growth rates led to a reduction in Brazil's export revenues. To make things more difficult, Europe faced a sustained economic stasis and the US focused on its own recovery since 2009, further constraining the demands of the emergent world in multilateral negotiations.

Following the establishment of diplomatic relations with the PRC in 1974, cooperation between both countries reached its highest point during Lula administration. The two countries had already signed what would be China's first strategic partnership with another country in the post-Cold War context in 1993, but it further improved in 2004 with the creation of the Chinese-Brazilian High-Level Concertation and Cooperation Commission (COSBAN). During Lula's tenure, about 30 new bilateral cooperation agreements were signed. Between 2003 and 2015 the presidents of both countries held 15 bilateral talks, counting state visits and bilateral agendas during summit meetings. In 2012, both countries elevated their relationship to a Global Strategic Partnership (Marcondes and Barbosa 2018). The most recent joint action plan was signed for the 2015-2021 period (Lima 2016). At the multilateral level, cooperation between Brazil and China was significant but asymmetrical in initiatives to deconcentrate political and economic power in the international system (e.g., G20, BRICS, CELAC, AIIB, New Development Bank)⁸.

Cooperation in defence matters between Brazil and China was limited. Despite high ranking bilateral visits, and the creation of a Joint Commission for Exchange and Cooperation (2004), and the

⁷ The Merida Initiative was a US aid program estimated at about USD 1.4 billion, funding military equipment acquisition, intelligence, technological and personnel training (Arteaga 2009; Olson and Wilson 2010).

⁸ Brazil is a founding member of the NDB, but only a Prospective Founding Member of the AIIB.

signature of a Framework Agreement on Defence Cooperation (2011), not much was implemented (Marcondes and Barbosa 2018). The agreements with the China Electronics Corporation, the China National Electronics Import and Export Corp, and the China Aerospace Science and Industry Corporation to develop parts of strategic projects linked to remote sensing and surveillance in the Amazon and the South Atlantic did not develop as expected. Even areas with a history of cooperation, like the Sino-Brazil Earth Resources Satellite program (Cepik 2011) and aeronautics (e.g., a joint venture between Embraer and China Aviation Industry Corp; Schneider and Ioris 2018), have experienced declining financial and political investments because of Brazilian strategic inconsistencies and a growing technological gap.

Mexico's economic relations with China have grown in importance but remained conflictual due to trade imbalances. In 2000, China did not figure within the top-five Mexican trading partners; only two years later, it became Mexico's second trading partner. Chinese economic presence in the Mexican economy was consistent over the 2000s. China exported USD 2.58 billion to Mexico in 2000, while Mexican exports were USD 433 million. By 2017, Mexico exported USD 8.98 billion to China, while imports were USD 52.1. Chinese global commercial success affected Mexico's market share in North America. Gallagher and Dussel (2013) note that in 2013, 82% of Mexico's exports of 'high-tech' goods (which represented 40% of the country's total exports) were at risk of being negatively affected by RPC's competition. Two additional aspects should be noted. First, what has been called an increasing 'Latin-Americanisation' of the terms of the trade. Former medium to high-level technological content in Mexican exports to China (e.g., integrated circuits, telephones, semiconductors, optical equipment) were replaced by raw materials and less aggregated value goods (e.g., crude oil and copper ore). Second, for several reasons, including complex NAFTA regulations, Chinese cumulative stock of OFDI in Mexico from 1999 to 2015 was USD 409 million, less than 0.1% of Mexico's total FDI in that period (Dussel et al. 2013; Dussel 2017).

Although Fox and Calderón have largely ignored China in their diplomatic efforts, Peña Nieto could no longer do so (Cornejo 2008; 2013). In 2003 the relationship was elevated to *Strategic Association*. Between 2000 and 2018, presidents of both countries met only seven times, four of them after 2012. During the State Visit of President Peña Nieto in November 2014, he and President Xi Jinping signed 14 agreements in sectors such as banking, energy, technological, educational, food, tourism, commerce, and industrial cooperation and investment. Not much has resulted from those agreements (Cornejo, 2019).

Despite supporting CELAC and participating in the China-CELAC Forum, foreign policy under Peña Nieto was also mainly about the United States (Covarrubias 2019). Immigration issues and the so-called border wall captured much of the bilateral agenda when the Trump administration started, along with the NAFTA renegotiations and the proposed United States-Mexico-Canada Agreement (USMCA; Villarreal and Fergusson 2019). By 2018, Mexico had signed 11 FTAs involving 46 countries, including most economies of the Western Hemisphere, as well as Japan and the European Union (OECD 2019). Moreover, Mexico launched along with Chile, Colombia, and Peru, the Pacific Alliance, a sort of counterbalance for the blocs promoted by Brazil (UNASUR) and Venezuela (ALBA).

Cooperation with China in the area of defence was even more limited because of the privilege of US relations. To our knowledge, apart from a few towed artillery pieces procured from NORINCO up to 2004, China was not a weapons supplier to the Mexican government. The secretaries responsible for defence and naval affairs visited China in 2016, and high-level exchanges comprised most of the existing cooperation. In the China-Latin America Advanced Defence Forum, China and Mexico committed to increasing bilateral training and experience sharing but it came into remaining to be seen (Dussel and Levy-Dabbah 2018).

Missed opportunities

Brazil underutilised the partnership with China because of social contradictions and strategy errors. The limitations combined difficulties of accommodating and finding agreements among contradictory socio-economic interests, defining long-term objectives, and creating an integrative framework to negotiate with Chinese counterparts (Cardoso 2016). The industrial business community and centre-right political forces, for instance, opposed the international insertion strategy proposed by Lula and the emphasis given to cooperation with China. The same national sectors were against the recognition of China as a market economy (2005) and later pressured Rousseff for protectionist measures and demands against China in the WTO. Those actors preferred a macroeconomic policy that maintained appreciated exchange rates and supported a veto coalition against bilateral trade and investment agreements (Pereira 2018; Powell 2016).

There were two key flaws in Lula's strategy — kept with less intensity under Rousseff. First, Brazilian foreign policy insisted on an unrealistic campaign to obtain a permanent seat at the UNSC. This insistence alienated Argentina and China, Brazil's two most important international partners (Ramanzini Jr and Ribeiro 2013). Second, although the overall results of Lula's insertion strategy were positive, its lack of sustainability was caused by the dispersion of scarce political resources in multiple initiatives (Chagas Bastos and Franzoni 2019; Milani et al. 2017). The lack of well-coordinated priorities with its main strategic partners, the fall in tax revenue and increasing political polarisation since 2014 imposed defensive choices on the Brazilian government. What Malamud (2017) called "Brazilian rollback" was perhaps inevitable given the change in the correlation of forces in national and international affairs. Brazil and China signed in 2012 a *Global Strategic Partnership*. On the Chinese side, the partnership with Brazil was consistent with its grand strategy, and China had the means and long-term interest in the relationship with Brazil. On the other hand, however, Brazil failed to build the ends and the means to substantiate the new status of the partnership (Lima 2016; Zhou 2019).

Mexico's bilateral relations with China were elevated to the category of *Strategic Integral Association* in 2013. However, the practical consequences of the new status were even more limited than with Brazil. Blunders related to failed investment projects (the high-speed train from Querétaro to Mexico City, or the Dragon Mart Project in Cancún, for example), and other tensions arising from the Latin American-US relations (e.g., Venezuela and Cuba) prevented more coherent and proactive approaches from the government and the business community in Mexico on how to deal with China (Cornejo 2019; Dussel 2019). In political terms, the overall balance of Mexico's insertion strategy between 2000 and 2018 is negative, although less oscillating than Brazil's trajectory (Chagas Bastos and Franzoni 2019). One shall recognise that Mexico took part in multilateral initiatives, such as the Paris Agreement, the Global Compact for Migration, and the Nuclear Weapon Ban Treaty. The US open hostility under Trump towards such multilateral initiatives, however, compromised their significance for Mexico because of its overreliance on Washington (Covarrubias 2019). Fox's failure to promote the Free Trade Area of the Americas (FTAA), and the emptying of CELAC, UNASUR, and Pacific Alliance under Peña Nieto, put Mexico at odds and side-lined Latin America and the Caribbean in its international insertion strategy (González and Morales 2019).

In economic terms, the balance for the 2000-2018 period in Mexico is scarcely positive — which makes the insistence of different governments on the same strategy somewhat surprising. Mexico's participation in the NAFTA/USMCA and the negotiation of dozens of bilateral and multilateral FTAs can be associated with the country's per capita income growth. It went from USD 7,158 in 2000 to USD 9,698 in 2018. When compared to China, or even Brazil, Mexico's GDP growth is significantly lower. While China's nominal GDP increased 13-fold between 2000 and 2018, Brazil's GDP rose from USD 655 billion in 2000 to 1.8 trillion in 2018, whereas Mexican economy went from USD 707 billion to 1.2 trillion (World Bank 2020).

To Brazil, one of the limitations was the dissent between the economic and political elites, whereas to Mexico it was some ‘blind consensus’. In other words, the notion that the only path to enter the ‘First World’ was subordinate participation in the integration process with the US. This was partly because of a reduction in the state capacities (budget and personnel) for implementing a foreign policy that directed more and more towards the US and Canada (Schiavon and Figueroa 2019). Yet, it also stemmed from a strategic mistake: the failed replacement of the Estrada Doctrine by the so-called Castañeda Doctrine during the PAN governments. In abandoning Latin America and the Global South, Mexico lost relevance in relation to its past in the G-77 and in the Non-Aligned Movement. Besides, the country did not take part in important complementary global governance initiatives driven by China since the 2008-9 crisis.

When Peña Nieto tried to emphasise the partnership with China to attract investment and reduce excessive dependence on the United States, it was too little and too late. In fact, there was an increase in visits and high-level discussions. Peña Nieto made four state visits to China between 2013 and 2017, the same number added to all Mexican presidents since Zedillo in 1996 (Cornejo 2019). The improvement in diplomatic relations was insufficient to produce significant economic and geopolitical effects on Mexico’s insertion. The failure of Chinese investment projects in Mexico and the very low presence of Mexican companies operating in the Chinese market, in this sense, is a mirror of the Mexican government’s inability to resolve problems with China through bilateral arrangements endowed with means, authority and transparency (Dussel and Levy-Dabbah 2018).

Finally, the slowdown of Chinese GDP growth rates, dropping from an annual average rate of 9.61% (1989-2017) to 6.6% in 2018 (World Bank 2020), reduced China’s demand for commodities. The impact in Latin America was direct: it reduced growth by 1-2% on average since 2013 (see Wise and Ching 2017).

There were also issues on the Chinese side. President Xi Jinping proposed in 2014 the build-up of a joint cooperation framework based on the China-CELAC plan, with three pillars (trade, investment, and finance), and six fields (energy, infrastructure, agriculture, manufacturing, scientific and technological innovation, and IT). Cui (2016) noted that disparities between countries in the region and national turmoil within each country demanded an institutional response from China that was more sensitive to different contexts.

We echo Wei (2019) on recognising the fact that China has less experience in Latin America than in Asia or Africa. To guarantee its long-term strategic interests, Beijing needs to attempt to improve its political and institutional knowledge about each country. In the cases of Brazil and Mexico, economic inducement and diplomatic instruments were insufficient and point out the necessity to directly assist institutional and cooperation capacity building.

In sum, the end of the commodity boom, the slower pace of Chinese growth, and internal crises in different Latin American countries have posed growing challenges for the region and its relations with China.

Conclusion

We analysed in this paper how and why Brazil and Mexico used the opportunities and challenges given by the Chinese presence in Latin to attempt to change their positions in the international order. Their attempts reached limited results, even though they had China to spring out of their international insertion. They were provisory (Brazil) or negative (Mexico), failing to alter their structural subordinate place within the global economic and political hierarchies.

We demonstrated that, on the one hand, Brazil under Lula and Rousseff pursued an omnidirectional strategy that could not focus on its more immediate, regional surroundings, or on a stronger and consensual basis to pursue global transformative goals through South-South cooperation. On the other, Mexico under Calderón and Peña Nieto ended up deepening its ties with the United States, failing to be a ‘bridge between the North and the South’. Moreover, the countries

underestimated how much politics is a factor in determining trade and investment decisions made by Chinese relevant actors. Even though Brazil worked closely with China, the lack of national consensus regarding long-term goals contributed to hinder the sustainability of Brazilian strategy. Mexico also got trapped in its perception of China as a commercial threat, but as a serious partner to balance its excessive dependency from the US. Evidence of this is corroborated by voting patterns at the UN General Assembly since 2000 that showed more convergence between Brazil and China, whereas Mexico aligns more with the US (see Ramanzini Jr and Ribeiro 2013).

On a counterfactual and normative note, three scenarios would have been possible. First, Brazil could have increased cooperation with China to make effective its *Global Strategic Partnership*, as Mexico should have been a lot less deferential to the United States agenda in the region. Second, Brazil and Mexico should have attempted to increase their bilateral cooperation and multilateral coordination to unite the region around a sustainable development agenda (Stanley 2018). This would have responded to the persistent systemic pressures and produced sufficient ‘hedging’ regarding the great powers (Korolev 2016). This would certainly have been proven difficult for both Latin American countries. Taking into account the failure of their largely solipsist logics of autonomy (Brazil) and acquiescence (Mexico), one is compelled to critically evaluate.

Coordinated initiatives with China, such as bilateral investment agreements, technology transfer agreements in priority industrial sectors, or strategic business partnerships (besides mergers and acquisitions) in third markets could have been driven by a regional cooperation logic. The US might have responded more forcefully, or China might not have gone along with Brazilian and Mexican insertion strategies. These prospective scenarios might have produced more autonomy and an enhancement of international position of both countries —informing potential research paths to take in the future.

In fact, both countries treated China more as an economic opportunity/threat than a strategic partner. While Brasília overestimated its ability to autonomously pursue various global and regional initiatives without prioritising among them, Mexico overestimated the security and development benefits that it would accrue from its choice to deepen its dependence on the United States since 2000. In relative terms, China has become more important to Latin America than the opposite. In 2016, Chinese exports to Brazil represented 0.01% of total Chinese exports, while exports to Mexico accounted for 0.02% (OEC 2020). Those sectors that benefited from the increased Chinese presence in Latin America (such as consumers of industrialised products in Mexico or agribusiness in Brazil), and those that felt threatened (such as the electronics industry in both countries), failed to find common ground to seek strategic responses to Chinese presence —a comprehensive approach that could have gone beyond a mere reaction to the ‘China factor’.

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