SM

SOUTH AMERICA

Officer Block 2 and Enlisted Block 3

An Introduction to the South America Region

Regional, Culture, and Language Familiarization (RCLF) Program

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Introduction

One must distinguish between the study of regions, countries, and cultures. Chapters 1 through 6 in this document introduce a region and provide some information about its countries and their relationships. They do not introduce a culture or cultures. Those chapters simply provide knowledge about the region and the environment in which people with different cultures live.

Regions and states do not have a single culture; instead they have multiple, diverse cultures. Cultures are not necessarily bound by national borders. There may be multiple cultures in a single state, while people sharing a single culture may live in more than one state.

The case study in Chapter 7 is about one specific culture in the region. Building upon the information provided in chapters 1 through 6, Chapter 7 introduces one of the many cultures in the South America region, using concepts discussed in the Operational Culture General document.

Introduction to South America

According to General John F. Kelly, USMC, Commander of the U.S. Southern Command (USSOUTHCOM), this region is increasingly important to the U.S. national interest.[1] The priority mission of USSOUTHCOM is Countering Transnational Organized Crime (CTOC) in response to the challenges posed by the spread of transnational organized crime in the region.[2] Secondly, General Kelley says that building partner capacity is the cornerstone of U.S. engagement strategy in the region, particularly with Colombia, with whom the Commander views as one of our strongest allies.[3] In Peru, USSOUTHCOM and the Drug Enforcement Administration (DEA), are continuing to support Peru's ongoing efforts against the Shining Path guerilla organization. In Brazil our military-to-military cooperation at the operational and tactical levels remains strong, as the U.S. continues to engage with Brazilian security forces for the 2014 World Cup and 2016 Olympics.[4]

Sgt Travis D. Nessel, USMC, 3rd Amphibious Assault Battalion, marks a path with yellow palm tree leaves during jungle warfare training in Colombia on 3 August 2010. The unit was deployed in support of Operation Southern Exchange 2010 (Source: Defense.gov; photo by Cpl Brian J. Slaght, USMC.)

South America is the fourth largest continent on Earth, it includes 12 independent countries and 2 foreign territories (the Falkland Islands and French Guiana).

As a Marine assigned to the South America region, your growing understanding of the cultural and security-related aspects of this particular region can give you the tools to help you better navigate, should you be deployed to the region.

South America has always been an important partner of the U.S.; both politically and economically; but South America's history of political and economic instability has long been a security concern for the United States. Violence, illegal drugs, trafficking, and transnational criminal organizations are issues that require close political-military cooperation between the United States and its South American partners.

For decades, Marines have engaged their South American counterparts in a variety of cooperative security activities, including exercises involving infantry tactics and logistics. An excellent example of this cooperation is UNITAS, which is a USSOUTHCOM-sponsored, multilateral maritime training exercise, and the world's longest-running allied military exercise.[5] In all, more than 30 ships, 2 submarines, and 50 aircraft participated on the UNITAS Gold in May 2014 – in celebration of 50 years of the exercise.[6]

Aimed at enhancing security cooperation and improving coalition operations, this annual exercise involves participating forces in a variety of maritime scenarios in Atlantic and Pacific waters around South America.[7] UNITAS Atlantic also includes the Marine Corps exercise, Partnership of the Americas.[8] This USMC exercise began in 2006 as a company-level, multinational exercise where a Marine Corps unit traveled to Chile – and, subsequently, to Peru -- to conduct military-to military exchanges.[9]

Geographic Overview

Why a Geographic Overview Matters to You as a Marine

Geographic features include physical and biological factors tied to location, topography, climate, soil, environmental hazards, flora, and fauna. These features influence human and social characteristics such as beliefs, behaviors, social organization, economy, and politics, to name a few. This is not to say that geography determines how people and societies behave, but rather that it has varying effects on what they believe and do.

The locations of rivers, mountains, deserts, and coasts have great influence on where people live, what crops can be raised, and what modes of transportation are suitable. Climate and weather influence how people dress, work, and earn a living. Natural disasters like hurricanes, flooding, and earthquakes can devastate a region, and dislocate a great number of people.

South America Global Location

South America is the fourth largest continent in the world, and covers 12% of the earth's land mass.[10] This region is almost double the size of the continental United States.

Countries

The region includes 12 countries: Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Suriname, Uruguay, and Venezuela

Plus two foreign territories: Falklands or Malvinas (Great Britain) and French Guiana (France)

Source: LANIC

Topography – Major Features

The main topographic features in South America are:

(1) The Andes Mountains, to the west, stretch from the southern tip of the continent to Venezuela in the north, and contain dozens of peaks that reach over 20,577 feet (6,271.9 meters).[11] The Andes also contain numerous glaciers in the north, an extensive plateau known as the *Altiplano,* and the driest desert on earth – the Atacama Desert, stretching from northern Chile, through Peru, to Southern Ecuador.[12]

(2) Guiana Highlands is a heavily forested plateau that covers the southern half of Venezuela, all of the Guianas except for the low Atlantic coastal plain, the northern part of Brazil, and a portion of southeastern Colombia.[13]

(3) The Amazon Basin has more than 1,000 tributaries irrigating almost half of the continent, and provides 31% of all the fresh water on Earth.[14] The Amazon and Orinoco rivers are joined by tributaries and flow east to the Atlantic Ocean.[15]

(4) The central lowlands are east of the Andes; they include the plains of Patagonia, the grasslands of the Pampas, and the Gran Chaco.[16]

(5) The Atlantic coastal plains are narrow and follow the entire Atlantic coast. Structurally, these plains are located in the continental shelf of South America.

South America Sub-Regions

South America can be divided into three sub-regions, with countries grouped together based on their geographic location and/or common culture. These regions include:

> **The Andean Region** (Northern, Central, and Southern)
> **Brazil**
> **The Guianas**

Note: For commerce and trade purposes, Brazil may be grouped as part of the Southern Cone, while Argentina may be grouped in both the Southern Andean region and the Southern Cone.

Source: LANIC

The Andean Region

Northern Andean Countries:
Colombia and Venezuela (both with a Caribbean and Pacific coast).

The main geographic characteristics are:[17]
- The Pacific coastlands;
- The Caribbean coastlands;
- The Andean Ridge;
- The *Oriente* (tropical lowlands in the east).

Colombia is a country segmented by physical features, but transportation costs across regions are high. Regional differences are strong and reflect differences in culture and socioeconomic standards. There are many regional centers and major cities.
Venezuela's Lake Maracaibo region (Caribbean lowlands) have a different culture from the rest of the country. People in the Lake Maracaibo region are characterized by a Caribbean culture that is looked down upon, in every sense, by inhabitants of the cooler Andean towns.[18]

Central Andes countries like Ecuador and Peru have a Pacific coastline, but Bolivia – another Central Andres country -- is landlocked. The main geographic characteristics of the Central Andes region are:[19]
- The *costa* (coast): There are tropical coastal forests in Ecuador, and a coastal desert in Peru.
- The *sierra* (mountains): In southern Peru, the two main *cordilleras* (mountains) spread in an extensive high plain, the *altiplano*, with Lake Titicaca spanning the border between Peru and Bolivia.
- The *Oriente* (region east of the Andes): tropical rainforest lowlands (*selva*) are drained by tributaries of the Amazon River.

La Paz, Administrative Capital of Bolivia, the highest capital in the world at 12,007 ft. (Source: CIA World Factbook)

Southern Andean Countries: Chile, Argentina, Paraguay and Uruguay. Argentina's topography is grouped with Paraguay's and Uruguay's:[20] Argentina's topography is also grouped with Paraguay's and Uruguay's, in the southern cone of South America.

Peru and Bolivia – Coca plant cultivation has been part of traditional farming systems in the Andes since pre-Columbian times.[21] Coca is a folk plant used as a stimulant, and chewed to suppress hunger, cold, and fatigue.[22] The dried leaves were transported by *llamas* from the *oriente* to the *sierra*. It was easier to transport coca leaves than potatoes for trade purposes, so coca became a traditional and profitable crop.

Chile's main regions are:
- **Northern**: characterized by the Atacama Desert.
- **Middle:** contains extensive plains with the Aconcagua River in the north, and the Bío-Bío valley in the south. The region also includes large cities such as Santiago and Valparaiso-Viña del Mar.
- **Southern**: marked by dense woodlands, hinterland, with the far south region comprised of offshore islands, fjords, glaciers, and mountains.

The War of the Pacific (1879-1883) was a dispute between Bolivia (allied with Peru) and Chile over the sovereignty of the mineral-rich coastal area of the Atacama Desert.[23] Bolivia suffered a humiliating defeat and lost its entire coastal territory to Chile.

Argentina, Paraguay and Uruguay's main regions:[24]
- High Andean lands in the northwest (cold, dry).
- Lowlands between the Andes and the Atlantic (semi-arid Gran Chaco) and the Argentine plains, the *Pampas*.
- Argentine *Patagonia* desert in the south.

Ushuaia, the southernmost point in Argentina (Source: CIA World Factbook)

Brazil

Brazil can be considered as an entire sub-region in South America because it is the largest country in the region by area and population, with a distinct language and many regional cultures.[27] Brazil's landmass is equal to the continental United States, and its population is the fifth-largest in the world.

Brazil's main geographic regions:[28]

The Guiana Highlands are rich in minerals, but this region is largely unexplored.

The Amazon Basin has the largest volume of water compared to any other river system on Earth.

The Brazilian Plateau (highlands) is similar to the Guiana Highlands.

The Atlantic Coastal Plain has been utilized for food production from pre-Columbian times to present.

The plains are generally narrow and discontinuous because of the highlands; it merges in the south and west with the grassy plains of Uruguay.[29]

Source: Wikipedia

The Guianas

Countries in this region are Suriname and Guyana, plus the territory of French Guiana. Due to their coastal location and the thick forest that separates these countries from the rest of South America, the Guianas are isolated from the rest of the region.

The Guiana Highlands are rich in minerals, including gold, diamonds, and bauxite.[30]

Suriname's geography consists mostly of rolling hills and a narrow coastal plain with swamps.

The region is sparsely populated, with the population of Guyana estimated at 800,000; Suriname at 573,311,[31] and French Guiana at 200,000.[32] People in Suriname largely reside along the coast.

Suriname is the smallest independent country on the South American continent. Suriname is a country that is easy to enter illegally because rainforests obscure its borders. Since the mid-1980s, Brazilians have settled in Suriname's capital, Paramaribo, or eastern Suriname, where they mine gold.[33]

Note: For historic, economic, and cultural reasons the Guianas are associated with the Caribbean region. The Guiana's countries and territory were colonized by North Europeans (British, Dutch and French). The local population cultivated sugar cane, a major cash crop.[34] Nevertheless, the Guianas are geographically part of South America.

South America's Main Rivers

Source: CAOCL

South America has extensive river networks:

The Amazon basin is located in the countries of Bolivia, Brazil, Colombia, Ecuador, Guyana, Peru, Suriname, and Venezuela. The Amazon River carries a greater volume of water than any other river on earth.[35] Navigation on the Amazon is unobstructed by rapids, all the way through Brazil and upstream of the Peruvian port of Iquitos.[36] The Amazon could become a major commercial route into the heart of the Amazon, but there are few centers of activity.

Magdalena River (Colombia) – Offers access to the core of Colombia, but water levels vary seasonally.[37]

River Orinoco (Venezuela) – In the wet season, the water levels are high; levels are low in the dry season.[38]

Plata River system (Brazil, Uruguay, Argentina) – This river system is silt-laden, but some vessels go inland even though mud banks make navigation difficult. The Paraná River joins the Paraguay River and the Rio de la Plata, making a spectacular descent over the Iguaçu Falls.

The Plata River System is also home to the hydroelectric plant of Itaipu, located on the Paraná River, on the border between Brazil and Paraguay.

The Itaipu power plant is the largest operating facility in the world:[39]

Iguaçu Falls, Brazil (Source: Courtesy of Denise Slater; CAOCL)

> "The bi-national power plant generated a total of 90,453 million megawatts in 2013 which is enough to supply all of the demand for electric power in Brazil for about 74 days; the State of São Paulo for about eight months and three days; the State of Paraná for about three years and four months; the city of Rio de Janeiro for five years and three months; the city of São Paulo for three years and one month. Paraguay would be supplied with electricity for eight years and two months. The entire world would be supplied for a day and a half."[40]

Itaipu Dam in Brazil is the largest in the world (Source: Itaipu.gov.br)

Some highlights of South American rivers, extracted from the guide *Working with Latin American Militaries* produced by the USMC Center for Advanced Operational Culture Learning – CAOCL:[41]

- South America Rivers complement road networks.
- Most militaries are focused on riverine operations.
- The common order of battle is divided into riverine units.
- Rivers provide the only surface access to many remote areas.
- The areas adjacent to rivers are subject to flooding and consequently to humanitarian assistance (HA) and disaster relief (DR) missions.
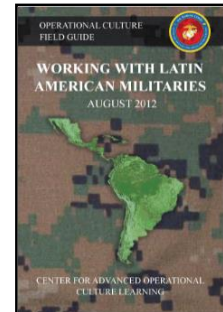
Climate and Weather

South America experiences a wide variety of climates. Tropical conditions prevail over more than half the continent, which includes most countries having only two seasons; rainy and dry seasons.[42] The rainy season occurs in the southern hemisphere summer months, from December to February.[43] The dry season takes place in the southern hemisphere's winter months, from July to August.[44]

Temperatures are cooler in the southern extreme of the equator, such as in the Patagonia desert and the southern regions of Argentina. Additionally, the Andes Ridges present cold and arid conditions along the Pacific coast and western slopes.[45] The Pacific side tends to be colder than the Atlantic side, due to the effects of a cold ocean current, known as the Peru Current.

Recommended Reading:

For a complete systematic and regional geographic survey of Latin America:

Brian W. Blouet and Olwyn M. Blouet, *Latin America and the Caribbean*, 6th Edition (John Wiley & Sons).

Climate Zones, Scenario A2 2001 - 2025, South America

National Aggregates of Geospatial Data Collection

PLACE III
Population, Landscape, and Climate Estimates

Projection: South America Equidistant Conic

A: Tropical
- Aw - winter dry
- Am - monsoonal
- Af - fully humid
- As - summer dry

B: Dry
- BSk - cold, steppe
- BWk - cold, desert
- BSh - hot, steppe
- BWh - hot, desert

C: Temperate
- Cfc - fully humid, cool summer
- Cfb - fully humid, warm summer
- Csb - summer dry and warm
- Csc - summer dry and cool
- Cfa - fully humid, hot summer
- Cwa - winter dry, hot summer
- Csa - summer dry and hot
- Cwb - winter dry, warm summer
- Cwc - winter dry, cool summer

D: Cold
- Dwc - winter dry, cool summer
- Dwb - winter dry, warm summer
- Dfb - fully humid, warm summer
- Dfc - fully humid, cool summer
- Dsa - summer dry and hot
- Dsb - summer dry and warm
- Dsc - summer dry and cool
- Dwa - winter dry, hot summer
- Dfa - fully humid, hot summer
- Dwd - winter dry, extremely continental
- Dfd - fully humid, extremely continental
- Dsd - summer dry, extremely continental

E: Polar
- EF - frost
- ET - tundra

Source: SEDAC/CIESIN – University of Columbia

Some highlights of the impact of South American geographic features on the cultures of the region, extracted from the guide *Working with Latin American Militaries,* produced by the USMC – CAOCL.[46]

"Regionalism and Culture - The impact of geography on culture can be traced back to settlement patterns during the colonization of Latin America. The Andes formed a natural barrier that divided the Spanish colonized countries from Brazil, which was colonized by Portugal. On both sides of the Andes, the European conquerors pushed indigenous populations into less desirable areas. Geographic and climatic variations have produced relatively well-defined "ethno-cultural" groups among different regions of many countries. During colonization, for example, Spaniards preferred the cooler highlands and avoided the tropical areas (thus avoiding mosquitoes, yellow fever, and malaria).

 These circumstances contributed to the deep regionalism that remains to this day. Regional sentiment however, has shifted from being focused on ethnicity to being mostly based along cultural lines of the various regions. Most Colombians in the Caribbean region, for example, are historically and culturally attached to the Caribbean Islands but, many of the officers and some of the NCOs come from the more affluent Andean regions. Regionalism is strong and affects every interaction among Colombian troops, NCOs and officers.

 Regional culture in Latin America has also created economic discrepancies between regions, which has deepened regionalism in many countries and made a "national culture" difficult to accomplish.

 This economic gap between regions has affected access to education and services between the urban and rural areas. While most Latin American countries are highly urbanized, heavily populated metropolitan centers have seen considerable increases of their urban poor. This paradox remains a challenge for the entire region."

Environmental Hazards

The region is prone to disasters related to heavy rains during the rainy season (December to February), and these rains are notorious for causing devastating floods and mudslides.[47] Another source of weather-related hazards are the severe droughts that occur during the dry season (from July to August).[48]

South America's location in the "Pacific Rim of Fire," make the Andean ridges prone to volcanic eruptions and earthquakes. Almost every major city in the Andean region has been devastated at least once by an earthquake.

Volcano *Nevado del Ruiz,* Colombia (Source: USGS)

The **Armero** mud flow disaster in Colombia: *Nevado Del Ruiz* erupted on November 13, 1985. Although the eruption was small, it caused a large mud flow which swept through the town of *Armero* almost 131 ft. (40 km) away from the summit. Over 23,000 people were killed.[49]

Earthquakes
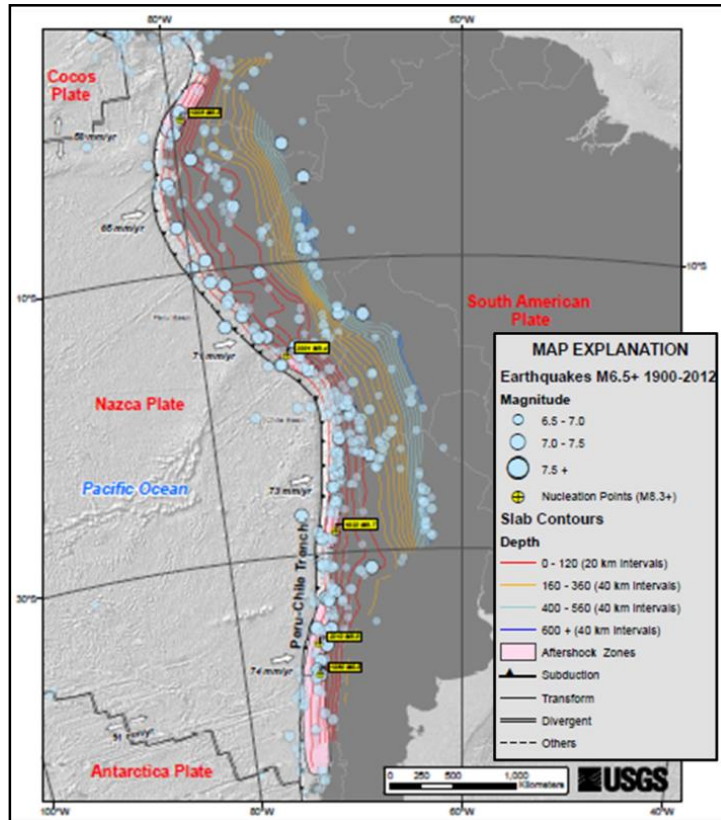
South America Seismic Activity (Source: USGS)

Devastation following the 8.8 magnitude earthquake in Chile (Source: U.S. Embassy.gov)

Earthquake in Chile: In February 2010, Chile experienced an 8.8 magnitude earthquake.[50] At least 523 people were killed, about 12,000 were injured, and about 800,000 people were displaced. In the Valparaiso area, at least 370,000 houses, 4,013 schools, 79 hospitals, and 4,200 boats were damaged or destroyed by the earthquake and tsunami. At least 1.8 million people were affected in the Bío-Bío valley, Maule, and Metropolitan region.[51] The total economic loss in Chile was estimated at 30 billion USD.[52]

Picture depicting potentially dangerous landslides areas in the city of Rio de Janeiro, Brazil (Source: USGS)
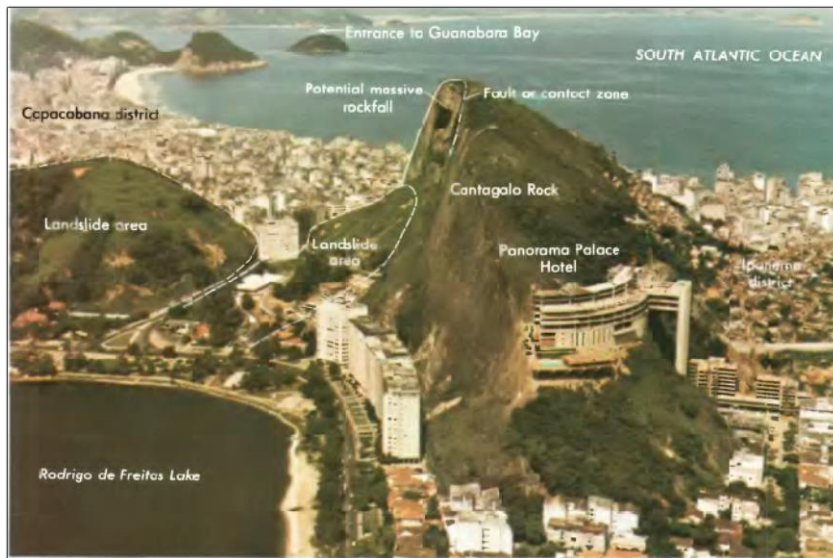
Mudslides

Mudslides are a common occurrence along the Great Escarpment that separates the Atlantic Coastal plain of Brazil from the Brazilian highlands.[53] Heavy annual rainfall causes flooding or mudslides in the same areas every year. These disasters are especially damaging to the urban poor, because they often live in sub-standard housing in flood-prone areas.[54]

In 2011, a series of floods and mudslides in the Rio de Janeiro state affected five cities and killed 800 people.[55] Seven hundred Brazilian army soldiers were sent to assist emergency personnel.[56]

Source: Wikipedia, photo by *Agência Brasil*

Deforestation

Deforestation continues to be a significant environmental concern in South America, especially in the world's largest rainforest, the Amazon. Approximately 20 % of the forest has been cut down in the past 40 years, and scientists predict that another 20% will be cut in the next 20 years.[57] The Brazilian government has set aside forest conservation areas and reserves for indigenous inhabitants, in addition to passing environmental protection legislation. However, the forests continue to be logged illegally.[58]

The satellite photo below depict images of the Santa Cruz region of Bolivia; the photo on the left was taken in 1984 and the other one in 2000.[59] In just a few short years, intense agricultural development has transformed the forest.[60]

Satellite images of the rainforest - Santa Cruz, Bolivia, 1984 (Source: USGS/NASA)

Satellite images of the rainforest - Santa Cruz, Bolivia, 2000 (Source: USGS/NASA)

Historical Overview

Why History Matters to You as a Marine

History provides you with knowledge of how people, institutions, and states in a region evolved into what they are today. It also provides insights into how people collectively think about their group and other groups. In other words, history not only shapes a region's current affairs, but also tells us something about the historical roots of the individual and group identities of its inhabitants.

History does not predict how groups, institutions, and states in a region may behave in the future. Instead, it provides insights into what is possible and probable.

Historical Overview

South American history can be summarized in six major periods:

Pre-Hispanic
European conquest
Colonial period
Independence
Post-independence
Twentieth century

Pre-Hispanic period

Prior to the arrival of Europeans to the continent, South America was home to many indigenous populations; some of these native groups were more advanced than others. In the Northern Andes, populations lived in hierarchically organized chiefdoms or small kingdoms. Some of the wealthiest chiefdoms and the most important trading centers were located in present-day Colombia. They were the *Tairona's* chiefdoms (1000-1550). Neighboring chiefdoms competed and battled each other around the same time period, such as the *Zenú* chiefdom and the *Muisca* chiefdom, just to mention a few.[61] In Ecuador, the coastal *Manteño* peoples controlled long-distance sea trade.[62]

The Inca Empire of Peru included present-day Ecuador, and was one of the largest civilizations in the Pre-Columbian era. The Incan Empire extended through six present-day South American countries: Argentina, Bolivia, Chile, Colombia, Ecuador and Peru. The Bolivian and Peruvian populations are the ones that present the stronger Amerindian heritage.

Source: Wikipedia.org

The Incan Empire occupied one-third of the South American continent, with a population of 9 to 16 million inhabitants under their rule.[63] The Incas achieved a high level of general material well-being and sophistication that rivaled and surpassed many of the great empires in world history.[64]

The Incas excelled in weaving, pottery, metallurgy, architecture, construction engineering, and irrigation agriculture.[65] Political authority was exerted over the entire region by a highly organized bureaucracy, with local officials on the bottom and a supreme ruler at the top.[66]

Statue of Inca Emperor Pachacuti (1438-1472), Machu Picchu, Peru.(Source: CIA World Factbook)

The most remarkable element of the Inca Empire was the *mitmaq* system:[67]

> "The Inca *mitmaq* was used to establish permanent garrisons to maintain control and order on the expanding Inca frontier. What began as a means of complementing productive access to a variety of ecological tiers had become an onerous means of political control under the Incas."[68]

The Incas left the legacy of many traits which are still present in Andean indigenous cultures today, especially in the Quechua culture, prevalent in Peru and Bolivia. For instance, all Inca people collectively worked the land and worshipped the "God of the Sun," the central god and religion of the empire. In return, they received food, as well as *chicha* and coca leaves (which were chewed and used for religious rites and for medicinal purposes).[69]

View of Sacred Plaza in Machu Picchu, Peru, located 7,970 ft. above sea level (Source: CIA World Factbook)

The basic local unit of Incan society was the *ayllu,* and was formed around kinship groups who possessed, collectively, a specific territory.[70] In the *ayllu*, grazing land was held in common ownership, since private property did not exist. Arable land was parceled out to families in proportion to their size.[71] Self-sufficiency was the ideal of Andean society. Family units claimed parcels of land in different ecological niches in the rugged Andean terrain, and developed the ability to produce a wide variety of crops, including maize, potatoes, and quinoa (a protein-rich grain); these subsistence crops were grown at different altitudes.[72]

Historical Timeline: Pre-Hispanic Period

The Incan Empire, occupied one-third of South America, extended through six present-day South American countries: Argentina, Bolivia, Chile, Colombia, Ecuador, and Peru

Inca Emperor Pachacuti (1438-1472)

Machu Picchu, Peru

Spanish invaders, led by Francisco Pizarro, conquered the Incas

The Incan expansion lasted until the Spanish Conquest

BC-AD	1400s	1494	1533
PRE-HISPANIC			EUROPEAN CONQUEST
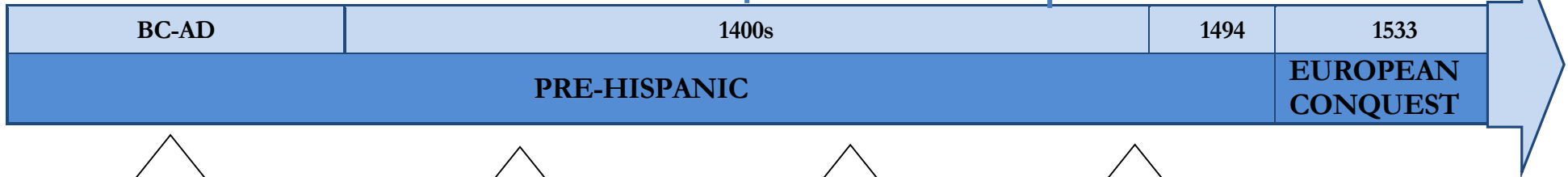
There were many indigenous populations in South America prior to the arrival of European *conquistadors*

The Incas left the legacy of many traits which are still present in the Andean indigenous culture, especially in the Quechua culture in Peru and Bolivia

The Incas followed a highly disciplined bureaucracy with effective authority over most of the Andes

The Inca excelled in weaving, pottery, metallurgy, architecture, construction engineering, and irrigation agriculture

European Conquest (Fifteenth to Sixteenth Century)

Explorers from Spain and Portugal had an advantage over their counterparts from other European monarchies. They possessed navigational technology that enabled them to safely reach the Americas; they had better financial resources; and they had more sophisticated weaponry. Additionally, Spanish and Portuguese explorers, because of their strong Roman Catholicism, were motivated less by a spirit of adventure than by a crusading ideal of converting "heathen masses" to "the true religion."[73]

Some five years before the Spanish invasion, the vast Incan empire was rocked by a civil war that, combined with diseases imported by the Spaniards, would ultimately weaken its ability to confront the European invaders.[74] The Spanish invaders, led by Francisco Pizarro, conquered the Incas by 1533.[75] The area (present day Peru) soon became the richest and most powerful Spanish colony in South America because of its privileged location and many mineral treasures.

In the Northern Andes, the conquest of Colombia and Ecuador was consummated rapidly due to the devastating effects of European diseases on native populations.[76] These imported diseases reduced the indigenous population of the coastal regions by as much as 90 percent. Highland peoples resisted Spanish domination and relatively few battles took place, but they survived in small numbers for decades, with most of natives eventually dying out. Colonial rule and forced conversion to Catholicism abruptly ended many indigenous traditions.[77]

Atahualpa, Inca Ruler, Defeated by Pizarro in 1532 (Source: Smithsonian, National Anthropological Archives)

A painting of a Spanish man and an Indian woman with Mestizo child, 1770 (Source: Wikipedia)

The Spaniards recreated many aspects of their own society in the Americas, such as the typically Spanish designs for cities and their richly complex societies.[78] However, there was a shortage of Spanish women, which led Spaniards to take Indian women as their consorts.[79] The resulting mixed-blood children were usually illegitimate and were called *mestizos*. This was the beginning of the *mestizo* race, which would become the dominant ethnic component of Spanish America.[80]

Historical Timeline: European Conquest Period

The indigenous populations of the coastal regions were reduced by 90%, while the highland people resisted Spanish domination and survived in small numbers for decades

European Conquerors pushed indigenous populations into less desirable areas. Spaniards preferred cooler highlands and avoided the tropical areas

A shortage of Spanish women led Spaniards to take Indian women as their consorts, resulting in mixed-blood children; it was the beginning of the *mestizo* race

European colonizers recreated many aspects of their own richly complex societies in the Americas

Inca ruler Atahualpa, defeated in 1532

Catholic Church in La Paz. Bolivia

BC-AD	1532	(FIFTEENTH TO SIXTEENTH CENTURY)	
PRE-HISPANIC		**EUROPEAN CONQUEST**	**COLONIAL PERIOD**

Five years before conquest, the Incan empire was rocked by a civil war that, combined with diseases brought by the Spaniards, weakened its ability to confront the European

Colonial rule and forced conversion to Catholicism abruptly cut off indigenous traditions

The Spanish and Portuguese Catholic monarchies had navigational technical ability, economic base, weaponry, and the crusading ideal to convert

Colonies were controlled by Spanish and Portuguese kings and the Roman Catholic Church

Colonial Period (1521 to 1812)

The Spanish arrived in America in 1492, the same year they defeated the Moors in Spain during the Reconquest.[81] They arrived with a spirit of conquest, as warriors seeking "gold, glory, and God.[82]" One important factor that contributed to attracting Spaniards to South America was that, in Spain, there was little opportunity for upward social mobility, while the New World offered that opportunity, as well as riches. The Jesuits and other missionaries came to convert the natives, and were dedicated to the task of catechizing the Indians.

Colonial walled section and fortress in Cartagena, Colombia (Source: CIA)

The Spanish brought with them an urban-focused colonial system.[83] This partly explains the existence of the large megalopolises seen in the region today, with cities such as Lima and São Paulo having been built to support the colonial conquest and trade.[84] This urban focus also contributed to the strong rural and urban divide, which still persists.[85]

Spanish colonial societies relied on "purity of blood" as a basis for social class division.[86] Today, many Latin Americans continue to identify themselves and others according to ancestry, physical appearance, and perceived socio-cultural status.[87]

Megalopolis - A region made up of several large cities and their surrounding areas, in sufficient proximity to be considered a single urban complex.[88]

The Treaty of Tordesillas

The 1494 Treaty of *Tordesillas,* between Spain and Portugal, granted the eastern half of South America to Portugal. According to the terms of the treaty, territories at the east of a meridian and 370 leagues west of the Cape Verde Islands would belong to Portugal; the lands to the west of the meridian would belong to Spain.[89] This imaginary vertical line, the *Tordesillas* Line, intersected South America from the mouth of the Amazon River to the South of Brazil, ran from pole to pole, and constituted Brazil's first frontier.

In 1500, Pedro Álvares Cabral, a Portuguese sea captain, "discovered" Brazil and claimed the territory for Portugal.[90] Permanent habitation did not begin until 1532, although temporary trading posts were established earlier to collect Brazilwood, used as a dye.
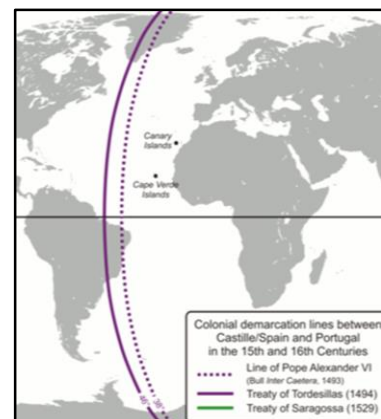
Source: Wikimedia

Differences in Spanish and Portuguese Colonization

The colonial history of Portuguese America contrasts with the history of colonial Spanish America in three fundamental ways:

First, the Portuguese colonizers were not warriors or Christian noblemen; second, there was no indigenous civilization in Brazil such as the Incas to defeat.[91] The *tupí-Guarani*, the largest language group, lived on the

coast, from (present-day) Venezuela to Southern Brazil and Paraguay.[92] The *Tapuias* inhabited the interior of the continent. These tribes were semi-nomadic, some were cannibalistic, and there was no organized kingdom.[93] Third, in sharp contrast with Spanish America, there was no gold or silver in Brazil. Since Brazil was a less profitable colony than other Portuguese overseas dominions, Brazil received a lower priority and much less monarchical control than Spanish America.[94]

This scarcity of gold led to a much different path of economic activities in colonial Brazil, such as sugar cane cultivation, which was heavily based in black slavery from Africa.[95] It was not until the 1690s that gold was found in what is today the Brazilian state of Minas Gerais, leading to an economic boom that lasted until the late 1700s.[96] Economic activities were later centered on export sugar plantations. Brazil became the "king's plantation," with over 2.5 million Africans transported to Brazil by 1810 to work on the crops.[97]

The Portuguese utilized the *capitania* system (captaincy), which was both a territorial division and a royal land grant in Brazil. By 1549, at total of 12 captaincies had been created within the colony.[98] In exchange for the land grant, the *donatário* (the recipient of a captaincy) had specific responsibilities to protect the region and – in order to promote agriculture -- distribute the land to settlers (apart from issuing a private grant).[99]

Recommended Reading:

For understanding Brazilian History:

E. Bradford Burn, *A History of Brazil*, Third Edition.

Thomas E. Skidmore, Brasil: *Five Centuries of Change*, 2nd Edition.
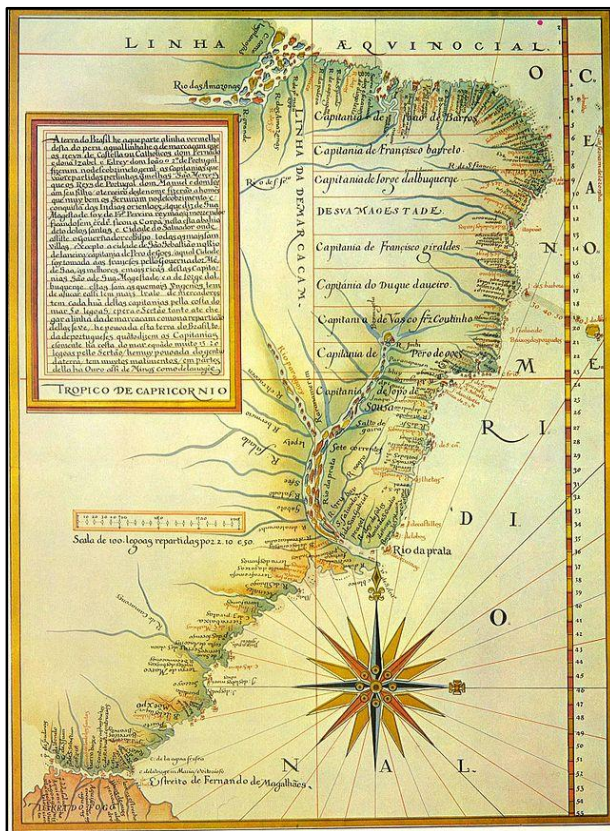
The 12 Captaincies Colonies of Brazil, 1549 (Source: Wikipedia)

Historical Timeline: Colonial Period

Portuguese and Spanish Colonization

Pedro Álvares Cabral, a Portuguese sea captain, "discovered" Brazil and claimed the territory to Portugal

The 12 Captaincies of Brazil

The scarcity of gold (until the 1690s), set colonial Brazil on a very distinct economic path from neighboring Spanish colonies

The Spanish brought with them an urban-focused colonial system

Over 2.5 million African black slaves were brought to Brazil to work on the sugar plantations

1494	1500	1549	1600s	1700s	1800s	1812
EUROPEAN CONQUEST		**COLONIAL PERIOD**				**INDEPENDENCE**

The 1494 Treaty of *Tordesillas* between Spain and Portugal, granted the eastern half of South America to Portugal

The colonial history of Portuguese America differs in three fundamental ways from colonial Spanish America:

Portuguese colonizers were not warriors or nobleman

No great native civilization to defeat or conquer

With initially no gold or silver, Brazil had less monarchical control

The strong rural and urban divide brought by the colonizers persist to present times

Spanish colonial societies relied on "purity of blood" as a basis for social class division

26

Independence Period (Nineteenth Century)

Between 1810 and 1825, all the Spanish territories on South America's mainland gained their sovereignty from Spain. Called the father of Latin American independence, Simón Bolívar (1783–1830) led armies to liberate Venezuela and Colombia, and was a great leader of the Wars of Independence. His dream was to unite Spanish America by subordinating regional loyalties to unite into a single South American Nation.[100] However, his dream never materialized, and the rebellious colonies broke up along their old Spanish Administrative units.[101]

Simón Bolivar, U.S. postage stamp (Source: Wikipedia)

Bolivarianism - The current leftist social movement underway in Venezuela, known as the Bolivarian Revolution, is named after Simón Bolivar. It leverages Bolivar´s image, ideals of independence, and equality for its socialist agenda.

The independence movement was led in the south by José de San Martín, a skillful military strategist, son of a Spanish officer, born in present-day Argentina.[102] He commanded the most daring exploits of this era: leading an army of 5,000 across the Andes Mountains. It was his surprise attack on royalist troops in Chile that caught the Spaniards unprepared, and resulted in a major victory that liberated Chile from Spanish rule.[103]

General José de San Martín is considered a hero in Argentina; and is the reason, the Order of the Liberator General San Martín is the highest decoration given by the Argentine government to foreign military or civilian individuals.[104]

General José de San Martín (Source: Wikimedia)

The text below summarizes this historic period, and was extracted from the guide *Working with Latin American Militaries* produced by the USMC Center for Advanced Operational Culture Learning:[105]

"After three centuries of colonial rule, several factors began to shape political unrest in the colonies. There was rising hostility between *Criollos* (people of Spanish descent born in South America) and *Peninsulares* (colonial residents of South America born in Spain). The American and French Revolutions significantly influenced the *Criollos´* thoughts and ideas on independence.

The occupation of Spain and Portugal by Napoleon's armies in 1807 pushed the colonies to begin their fight for independence. South American elites (the *Criollos)* led the independence movement. Their personal armies became the first armed forces that contributed to the building of national states. Once independence was gained, however, the elite did little to implement the democratic ideals they advocated. Instead, they maintained the rigid class distinctions of Colonial society, with themselves at the top. This perpetuated class divisions between the European elite and other groups. Even today, many officers tend to come from the elite and are politically, economically, and socially connected as well."

The Independence of Brazil

The Brazilian independence from Portugal differs quite significantly from Spanish America's. When the Portuguese court fled from Napoleon's forces invading Iberia in 1807, the British royal navy escorted the

Portuguese court to Rio de Janeiro. The court settled in Rio de Janeiro from 1808 to 1821, and their presence brought unprecedented progress to the colony. The presence of members of the Portuguese monarchy also created an inversion of political and cultural hierarchies.
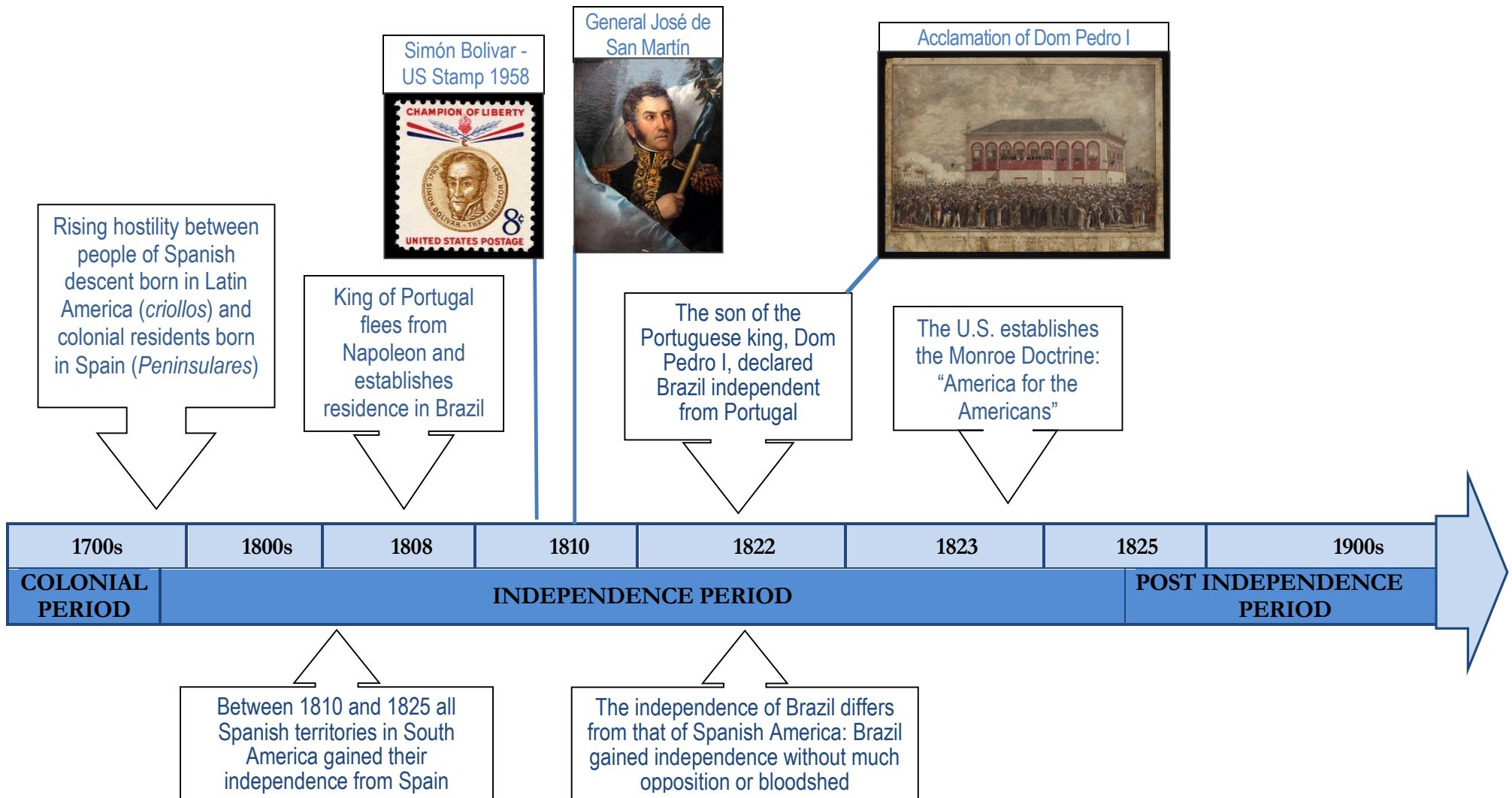
Court is defined as the "residence or establishment of a sovereign or similar dignitary; a sovereign's formal assembly of councilors and officers; the sovereign and officers and advisers who are the governing power; and his the family (…)."[106]

Portuguese Prince Regent João VI (1769–1826) and over 10,000 functionaries moved to Rio de Janeiro, which became the capital of the Portuguese empire for the next thirteen years.[107] Brazil was able to gain independence in 1822 with a unique characteristic of almost no bloodshed, because independence was proclaimed by the son of the king of Portugal, Dom Pedro I. He did not have much opposition, although both sides avoided massive set battles, they did engage in guerrilla tactics, demonstrations, and political maneuvering from the opposition.[108]

U.S. and South American Relations (Nineteenth Century)

In 1923, United States President James Monroe launched the Monroe Doctrine, which stated that all the newly independent countries and territories of the Americas were off limits to further European expansion.[109] The message was clear: "America for the Americans." It became the cornerstone of U.S. Latin American policy for the next century.[110]

Historical Timeline: Independence Period

Simón Bolivar - US Stamp 1958

General José de San Martín

Acclamation of Dom Pedro I

Rising hostility between people of Spanish descent born in Latin America (*criollos*) and colonial residents born in Spain (*Peninsulares*)

King of Portugal flees from Napoleon and establishes residence in Brazil

The son of the Portuguese king, Dom Pedro I, declared Brazil independent from Portugal

The U.S. establishes the Monroe Doctrine: "America for the Americans"

1700s	1800s	1808	1810	1822	1823	1825	1900s

COLONIAL PERIOD — **INDEPENDENCE PERIOD** — **POST INDEPENDENCE PERIOD**

Between 1810 and 1825 all Spanish territories in South America gained their independence from Spain

The independence of Brazil differs from that of Spanish America: Brazil gained independence without much opposition or bloodshed

Post-Independence Period (Nineteenth Century):
- **The Rise of the *Caudillos***
- **Mass Immigrations**
- **War of the Pacific (1879-1883)**
- **Paraguayan War / War of the Triple Alliance (1864-1870)**

The Rise of the *Caudillos*

Caudillos, or military dictators, initially filled the vacuum left by the break-up of colonial rule, including Juan Manuel de Rosas (1793-1877) in Argentina, the feared Francisco Solano López (1827-1870) in Paraguay, and Juan José Flores (1800–1864) in Ecuador.[111]

In Brazil, Emperor Dom Pedro II (1840-89) enjoyed a long reign, only interrupted by the Paraguayan War, until being deposed in 1889. The Brazilian republic was born rather accidentally: Field Marshal Deodoro da Fonseca had intended only to replace the cabinet, but the republicans manipulated him into fathering a republic.[112]

Dom Pedro II, Emperor of Brazil, 1864 (Source: Smithsonian)

Recommended Reading:

Latin America's history:

Thomas E. Skidmore Peter H, Smith and James N. Green, *Modern Latin America,* 7th Edition (Oxford University Press)

Theresa A. Meade, *A History of Modern Latin America – 1800 to the Present* (Wiley-Blackwell)

The text below summarizes this period (extracted *Working with Latin American Militaries*) produced by the USMC – CAOCL.[113]

"
"South America's post-independence period saw the rise of the caudillos: strong men and political leaders in the 19th century wars of independence in South America who gained power. The first caudillos were often generals who, leading private armies, used their military might to achieve power in the newly independent states. They typically had both military skill and personal charisma. Competition for power among different caudillos led to long periods of civil war and instability.

Note that caudillos were charismatic, authoritarian, willing to exert power, had disdain for weakness or compromise. The imperative need to preserve "face" and honor, illustrates South American "macho" culture."
."

War of the Pacific (1879-1883)

The War of the Pacific was a conflict involving Chile, Bolivia, and Peru. It was the result of a dispute between Bolivia and Chile over control of the mineral-rich coastal area of the Atacama Desert.[114] Chile

fought Peru and Bolivia over the ill-treatment of Chilean investors in the mining fields controlled by Peru and Bolivia.[115]

In one single battle at Tacna, the Chilean armed forces killed 5,000 Bolivian troops, from an army of 12,100 men.[116] Chile occupied Lima and won an overwhelming victory, but the humiliating defeat was a total economic disaster for Bolivia and Peru.[117] Chile gained control of a nitrate region, an area responsible for an economic boom for Chile. Bolivia lost control of the coastal province of Antofagasta, permanently losing access to the sea.[118]

This war has created long-lasting consequences for all three countries: it represented a path of success for Chile and hardships for Peru and Bolivia. Chile emerged as the major military power in the region, with a battle-hardened army and an impressive navy fleet, outranking all others in Latin America.[119]

> **Present day effects of the War of the Pacific** – Chile's territory seizure still irritates Bolivians and Peruvians, who say "there is nothing more dangerous than a Chilean with a map and a pen."[120] Additionally, Bolivia continues to demand that Chile return the seized territories to Bolivia, but Chilean refusals, and jokes about "inviting Bolivians to the beach," have not helped heal the wounds.[121]

Paraguayan War / War of the Triple Alliance (1864-1870)

After Paraguay's dictator Solano López attacked Uruguay, the countries of Argentina, Brazil and Uruguay signed the Treaty of the Triple Alliance in order to defeat the blood-thirsty Solano López government.[122] López made the grave mistake of attacking countries he was completely unprepared to confront militarily. The war was a disaster for Paraguay, and resulted in hundreds of thousands of deaths.[123] Paraguay's population was reduced from an estimated 1.4 million to perhaps 250,000, of whom only 10 percent were male.[124]

The Paraguayan War gave the Brazilian army its main battle experience, because it was the only war Brazil had fought in that time period. It gave them their military heroes; allowed for the rapid expansion of military ranks from 17,000 men (prewar) to 100,000; cemented close relations with Argentina, and fixed its main locus of operations on the South for decades to come.[125] The war also had a profound effect on politics within Brazil, with officers becoming important actors in Brazilian politics, which led to the creation of the Republican Party. The Republicans were abolitionists and also led the movement to end the monarchy in 1889.[126]

Mass Immigrations

After the abolition of black slavery in 1889, Brazil lacked servile plantation labor, so the state sought to bring immigrants to work in agriculture through the late nineteenth century.[127] The Peruvian case stands in contrast to that of Brazil,[128] because Peru was an unattractive destination for immigrants due to low wages and lack of land. Therefore, the Peruvian government hired Chinese contract labor, beginning in 1848.[129]
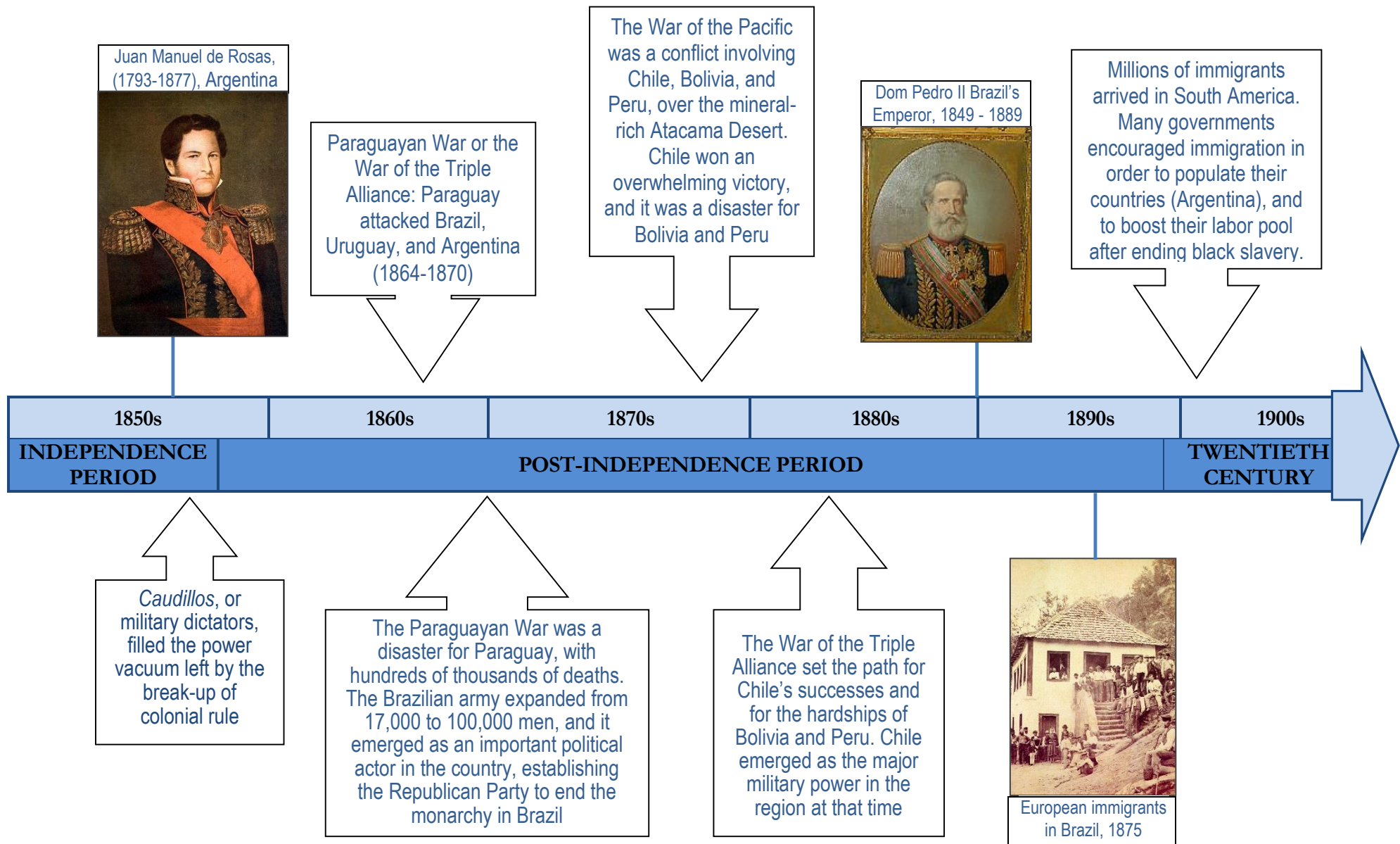
Most immigrants went to Argentina (7 million people), while immigration records kept by Brazil and Venezuela indicate that some 5 to 6 million people arrived at their ports between 1857 and 1920.[130] Over

4.5 million immigrants were of European origin, mainly from Italy, Portugal, and Spain; and a half million came from other parts of the world (Syrians, Lebanese, Palestinians, Koreans and Greeks). Approximately 200,000 people from Japan started to arrive at the beginning of the twentieth century.[131] In comparison, 12 million immigrants arrived in the United States between 1870 and 1900.[132]
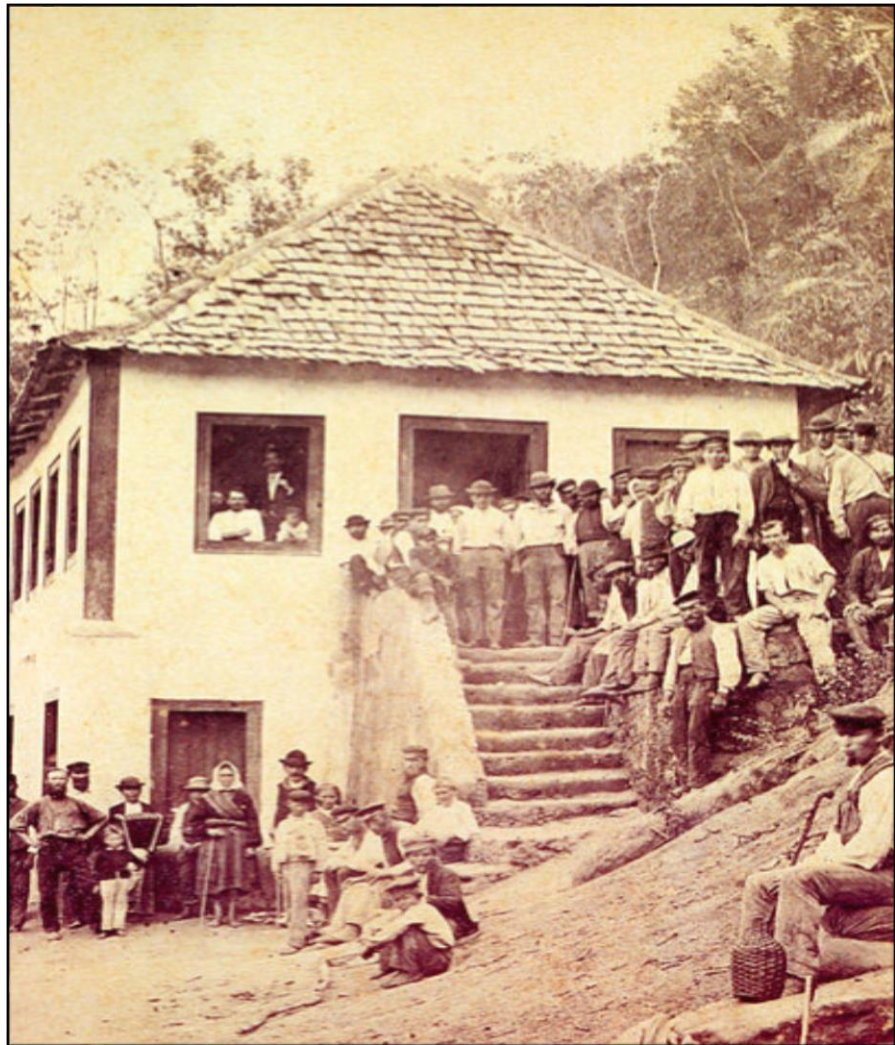
German and Luxembourger immigrants in São Paulo, Brazil (Source: Wikimedia)

Historical Timeline: Post-Independence Period

Juan Manuel de Rosas, (1793-1877), Argentina

The War of the Pacific was a conflict involving Chile, Bolivia, and Peru, over the mineral-rich Atacama Desert. Chile won an overwhelming victory, and it was a disaster for Bolivia and Peru

Paraguayan War or the War of the Triple Alliance: Paraguay attacked Brazil, Uruguay, and Argentina (1864-1870)

Dom Pedro II Brazil's Emperor, 1849 - 1889

Millions of immigrants arrived in South America. Many governments encouraged immigration in order to populate their countries (Argentina), and to boost their labor pool after ending black slavery.

1850s	1860s	1870s	1880s	1890s	1900s

INDEPENDENCE PERIOD

POST-INDEPENDENCE PERIOD

TWENTIETH CENTURY

Caudillos, or military dictators, filled the power vacuum left by the break-up of colonial rule

The Paraguayan War was a disaster for Paraguay, with hundreds of thousands of deaths. The Brazilian army expanded from 17,000 to 100,000 men, and it emerged as an important political actor in the country, establishing the Republican Party to end the monarchy in Brazil

The War of the Triple Alliance set the path for Chile's successes and for the hardships of Bolivia and Peru. Chile emerged as the major military power in the region at that time

European immigrants in Brazil, 1875

Main Events of the Twentieth Century

- U.S.-South American Relations (Early Twentieth Century)
- Main Conflicts: The War of a Thousand Days, the Chaco War, World War II
- More Caudillos
- Communism in Latin America
- Communist-inspired Guerrilla Movements and the Military Dictatorships in South America
- U.S. Relations with South America
- Other Significant Events of the Twentieth Century

U.S.-South American Relations (Early Twentieth Century)

Even though most U.S. interventions in Latin America in the twentieth century were in Central America and in the Caribbean, some interference did take place in South America. In 1903, President Theodore Roosevelt decided that the best choice for the U.S. to gain inter-oceanic access was through the northern end of the Republic of Colombia. However, the Colombian government refused to surrender territory to the Americans.[133] Roosevelt promoted a highly suspect "independence movement" within the northernmost Colombian state of Panama, and rapidly recognized the government of a pro-canal American sympathizer there. Panama began its fight for independence from Colombia on November 3, 1903, and Roosevelt sent the U.S. Navy to assist Panama's effort to gain independence from Colombia.[134] In Roosevelt's address to the 1904 Congress, he presented his "Corollary to the Monroe Doctrine:"[135]

> "All that this country desires is to see the neighboring countries stable, orderly, and prosperous. Any country whose people conduct themselves well can count upon our hearty friendship. If a nation shows that it knows how to act with reasonable efficiency and decency in social and political matters, if it keeps order and pays its obligations, it need fear no interference from the United States. Chronic wrongdoing, or an impotence which results in a general loosening of the ties of civilized society, may in America, as elsewhere, ultimately require intervention by some civilized nation, and in the Western Hemisphere the adherence of the United States to the Monroe Doctrine may force the United States, however reluctantly, in flagrant cases of such wrongdoing or impotence, to the exercise of an international police power."

Main Conflicts - The War of a Thousand Days (1899-1903)

The War of a Thousand Days was a war between liberal and conservative factions in Colombia that resulted in the death of 60,000 to 130,000 people.[136] In the end, the liberals were defeated and the economy was paralyzed; until the turn of the century, Panama was a province of Colombia. At the end of The War of a Thousand Days, the U.S. sent troops to suppress disorder in Panama, producing a diplomatic crisis that ended in an agreement (not supported by Colombia) for the U.S. to build a canal in Panama, which was followed by Panama seceding from the republic.[137]

Main Conflicts - The Chaco War (1932-1935)

The Chaco War was a conflict in which Paraguay defended its homeland to keep Bolivia from gaining access to the Atlantic, resulting in Paraguay's military occupation of the Gran Chaco region.[138] The war hurt Bolivian pride because Bolivians were confident of a rapid victory: Bolivia was richer and more populous than Paraguay, their armed forces were larger, had a superior officer corps, were well-trained, and well-equipped:[139]

> "These advantages quickly proved irrelevant in the face of the Paraguayans' zeal to defend their homeland. The highly motivated Paraguayans knew the geography of the Chaco better than the Bolivians and easily infiltrated Bolivian lines, surrounded outposts, and captured supplies. In contrast, Indians from the Bolivian high plateau area, known as the *Altiplano*, were forced into the Bolivian army, had no real interest in the war, and failed to adapt to the hot Chaco climate. In addition, long supply lines, poor roads, and weak logistics hindered the Bolivian campaign."

The symbolism of the Chaco War – Historically, the Paraguayans have made great sacrifices to keep their territory intact. For Paraguayans, the war is important to this day. For example, 29 September is a national holiday for the celebration of the Battle of Boquerón, the anniversary of a key victory in the Chaco.[140] On the other hand, for Bolivia, the symbolism of the war is currently critically important to national consciousness due to the loss of vast territories and oil deposits to Paraguay.[141] The Bolivians continue to have a small navy despite having no access to the ocean, which is something the Bolivians continue to pursue. To illustrate the importance of this matter to the Bolivians, in 2010 Peru and Bolivia signed a deal allowing Bolivia to build a port near Ilo, on Peru's Pacific coast.[142]

South America's participation in World War II (1939-1945)

Colombia supported the U.S.-led military effort to defeat the Axis Powers of Japan and Germany by ensuring that the Panama Canal remained open during World War II. Brazil joined the war effort, furnishing essential raw materials to Allied air and naval bases; and in 1944, Brazil sent a combat division of 25,000 troops to Italy that fought alongside the U.S. Fifth Army during the Allied invasion.[143] Other South American countries also supported the Allied cause in World War II. Argentina initially supported the Axis side. Later, it declared its "neutrality."[144]

More Caudillos

The twentieth century in South America was a turbulent political era, with populist strongmen establishing long-lasting dictatorships in many countries in South America. Here are just a few examples:

• **1930-34:** Getúlio Dornelles Vargas, populist dictator in Brazil, organized urban workers with the backing of state control.[145] Vargas was elected president between 1934 and 1937, then dictator between 1937 and 1945, senator between 1946 and 1951, and re-elected president between 1951 and 1954.[146]

• **1946:** Populist and charismatic Juan Perón was elected president of Argentina. In 1943, he participated in a military coup that brought down the constitutional government. Perón won a second term in 1952,but was deposed in 1955 and sent into exile. He returned as president in 1973 with his then wife, Isabel

Martínez de Perón, known as Evita), as vice-president. She succeeded her husband as president when he died in 1974 but was removed in a 1976 coup, and exiled.[147]

• **1954-89:** Alfredo Stroessner, dictator of Paraguay, generally suppressed political opposition, and was known for allowing Nazi war criminals to seek refuge in Paraguay.[148]

Communism in Latin America

Fidel Castro (Source: Wikimedia)

The Cuban Revolution, led by Fidel Castro, took place in the late 1950s during the Cold War, when the U.S. and the Soviet Union were each fiercely fighting for their world view to prevail – democracy versus Communism.

The Cuban Communist revolution inspired violent guerrilla movements throughout Latin America. These armed groups called for the people to take up arms to overthrow their governments, in order to implement state control of the economy.

Communist-inspired Guerrilla Movements and the Military Dictatorships in South America

In order to fight attempted Communist revolutions in their countries, many Latin American armed forces ideologically aligned with the U.S., undertook counter-revolutionary measures to prevent their countries from being turned into another Cuba. Right-wing military dictatorships prevailed in the region from the 1960s to the 1980s; these included Argentina, Brazil, Chile, Colombia, Ecuador, Peru, and Uruguay. The main Communist-inspired guerrilla movements in South America include:

• **1960s-2014:** The *Sendero Luminoso* (Shining Path) is a radical Maoist guerrilla movement based in the Peruvian highland peasant communities, which has conducted attacks since the late 1960s. Initially, the group was led by Abimael Guzmán, who used brutal assassinations to attempt to overthrow the Peruvian government. More than 30,000 people were killed by the movement.[149] By the late 1990s, most of its leaders and militants were in jail, and, in 2006, Guzman was sentenced to life in prison.[150] However, some 500 *Sendero*'s fighters persist to this day. In 2012, Shining Path rebels captured, and later freed, some 36 gas workers in the south of Peru.[151]

• **1963-1973:** The Uruguayan *Tupamaros* ("National Liberation Movement") was a violent guerrilla group that conducted political kidnappings and employed other terrorist tactics, especially in Montevideo. The group was named after Tupac Amaru, the last member of the Inca royal family, murdered by the Spanish in 1571.[152] By 1973 the *Tupamaros* were defeated, but not without serious long-lasting consequences to the country. For instance, the Uruguayan Army, which in 10 years had gone from consuming 1% of the national budget to over 26%, did not go meekly back to barracks. Uruguay, once the most tolerant and democratic country in South America, became another **garrison state**.[153] This was the only permanent legacy of the *Tupamaros*.[154] In 1989, the *Tupamaros* joined the Broad Front (a coalition of the Socialist party, Communist party and several other left-oriented parties), and transitioned into a legitimate political group.[155] After 1995, the Broad Front was represented in the Uruguayan parliament by José Mujica (previously jailed for thirteen years by the military government).[156] Mujica was elected President of Uruguay in 2009.[157]

- **1964-1985:** Brazilian President João Goulart boosted workers mobilization and the organization of the peasants in the country side, actions previously conducted by Getúlio Vargas.[159] This worker-peasant alliance, along with political turmoil with actions from radical groups such as kidnappings, was fueled by Communist ideals, deeply antagonizing the upper class and the armed forces. Goulart was ousted by a military coup and sent into exile. The ensuing military regime was bureaucratic-authoritarian but presided over a period of economic expansion.[160]

- **1968–1985:** Peru was run by military governments. In 1968, General Juan Velasco Alvarado, "veered left" by conducting a state-sponsored mobilization of workers and peasants against aristocratic landowners and foreign investors.[161] Later, the presidencies of General Bermúdez and General Belaúnde, tempered the previous authoritarianism.

- **1973:** In Chile, a military coup, supported by the U.S., unseated Socialist President Salvador Allende, and he died under mysterious circumstances, raising suspicion of CIA's involvement. Allende was succeeded by the repressive regime of General Augusto Pinochet, which continued until 1990.[162]

- **1976-1983:** During the "Dirty War" in Argentina, the military junta led by General Jorge Rafael Videla took on an all-out offensive against the organized guerrillas: nearly 3,500 people were imprisoned, and between 10,000 to 20,000 "subversives," terrorists, and sympathizers were killed or "disappeared."[163] Democracy was restored in the 1980s. Additionally, in 1982, Argentina started a war with Great Britain, because of the Falkland Islands (Islas Malvinas), which became known as the "**Falklands War**" (*read more below*).

Recommended Reading:

For understanding the "Garrison States:"

David R. Mares, "The National Security State," *A Companion to Latin American History*, Edited by Thomas H. Holloway.

The Falklands War / *Malvinas* War (1982)

Geographical location of the Falkland Islands or *Islas Malvinas*: 500 miles off the coast of Argentina, Southeast of the Patagonia desert, on the Atlantic Ocean (on Argentina's continental floor).[164]

Historical Background: Argentina had a long-standing sovereignty dispute with Great Britain over the Falkland (*Malvinas*) Islands and other islands in the South Atlantic Archipelago.[165] Argentina followed a doctrine that Chile was a Pacific power and Argentina an Atlantic power.[166] *Las Malvinas*, as the Argentineans referred to the disputed islands, had been part of the Spanish South American territory for a few years before 1832.[167] However, The Falklands were a long established British territory, occupied by two thousand people of English heritage and who spoke English.[168]

The reasons for war: In 1982 Argentina was governed by a military junta.[169] The country, however, was experiencing severe economic woes: 200 percent inflation; difficulty in paying their high foreign debt; and popular dissatisfaction which was expressed in large anti-government demonstrations.[170] Therefore, General Leopoldo Galtieri, the commander-in-chief of the army, decided that leading Argentina into war with the United Kingdom over the Falkland Islands would effectively divert the public's attention from anti-government demonstrations, boost his popularity with nationalists, and generally unite Argentineans. But he wrongly assumed that the British wouldn't care to defend the desolate islands 8,000 miles away from Britain.[171] The dispute also was about resource extraction from the South Atlantic Ocean floor and possible mineral rights in Antarctica.[172]

The Argentinean Attack: Argentina "invaded" South Georgia Island in the Falklands archipelago, on 19 March, 1982 with thirty metal salvagers landing and raising Argentina's flag. They sent additional Argentinean reinforcements (4,000 troops), and by April 2 the Argentineans captured Stanley.[173]

The British Response: The 22 Royal Marines dispatched from Stanley to South Georgia Island when Argentina first invaded were quickly outnumbered and surrendered.[174] The British cut the Argentinean supply line and reinforcement attempts by declaring a 200-mile Maritime Exclusion Zone around the islands, which was enforced by three British nuclear attack submarines.[175] The British surface task force generated the largest and most extended series of naval battles since the Pacific campaign in World War II:[176]

"(…) by the end of April: 20 warships, 8 amphibious ships and 40 logistics ships from the Royal Fleet Auxiliary and the Merchant Navy. The British Task force carried 15,000 men, including a landing force of about 7000 Royal Marines and soldiers. The logistics ships carried provisions for about three months of combat."[177]

Cultural Misperceptions: The war pointed out the danger of misperceiving the character of a head of state, and the importance of cultural and historical perspectives. Argentineans miscalculated badly when they assumed the U.S. would side with them against the British. The basis for that assumption was that Argentina's army was secretly training an army of "Contras" to overthrow the victorious Marxist-oriented Sandinistas from the government of Nicaragua.[178] To add to the Argentinean miscalculations, historians claim that "President Reagan had extended a warm welcome to General Galtieri at the White House when he visited in 1981; and the U.S. ambassador to the United Nations, Jean Kirkpatrick, argued publicly, and unsuccessfully, in favor of allying with the Argentines against England."[179] The reality was that the Argentines demonstrated that they did not understand British or American strategic interests and capabilities vis-à-vis Argentine capabilities, and this myopia cost the lives of many Argentines.[180]

How cultural differences influenced the outcome of the war: The Argentinean military demonstrated lack of cohesion among their forces, which was blamed on the "great social distance between officers, NCOs and conscripts. (…) most of the untrained conscripts came from the tropical Northern provinces and were simply not prepared to confront dreadful conditions and a well-trained and well equipped enemy."[181]

Outcomes of the War: Argentine lost the war to Great Britain in a humiliating and disastrous manner, setting the stage for de-legitimization of the military institution and its absolute decline as one of the most—if not the most-powerful institution in Argentina.[182] General Galtieri resigned as head of the junta and his successor promised elections by 1983 and return to a civilian government by 1984.[183]

• **1980:** General Luis García Meza seized control of Bolivia in a coup following fraudulent elections in 1978, 1979, and 1980.[184] His regime was marked by crime, mismanagement, and oppression. In 1995, he was extradited from Brazil, convicted of various crimes and began serving a thirty-year sentence.

• **1985:** Brazilian military completed the "re-democratization" process in Brazil, with elections of a new civilian president, Tancredo Neves. However, Tancredo died of natural causes on the eve of his inauguration. Former senator José Sarney, the vice-president elect, took on the presidency.

Many South American dictatorships committed human rights abuses, and some were more repressive and bloody than others, with the Argentine and Chilean being the most violent, with thousands of people being tortured and or killed. The 1964 coup in Brazil was bloodless, but heralded 21 years of military rule, in which some 400 people disappeared. This number pales in comparison to Argentina's, where an estimated 30,000 people were either killed or disappeared.[185]

Today, democracy has been restored throughout much of South America, and most countries have reached a general amnesty for actions committed on both sides. Cuba remains the only dictatorship in the Americas, and is among the longest-lasting and most brutal in Latin American history. Fidel Castro executed thousands of opponents and dissenters by firing squads in the first days of the revolution; imprisoned and tortured over 75,000, and forced 200,000 to flee to Florida.[186]

The Cuban revolution continues to exert influence in many countries in Latin America to present day. Under late President Chavez, Venezuela completely aligned with Cuba, provided oil and financial support to the island. Chavez' so-called "Bolivarian movement" has since led a populist, anti-American campaign of rhetoric blaming all the ailments in the region on the United States. This rhetoric has spread to other mind-liked leftist-extremist leaders in Argentina, Bolivia, Ecuador, and Brazil. Also, under the complete influence and guidance of the Cuban government, it promotes government interference in the economy, undermining democratic institutions and attacking press freedom.[187]

In some countries, like Brazil and Uruguay, exiled political activists and urban guerrilla fighters were allowed to return to their countries as part of the general Amnesty. Many have become elected officials, such as former President José Mujica, in Uruguay, and President Dilma Rousseff, from Brazil. Elected in 2009, Mujica spent the 1960s and 1970s as part of the Uruguayan guerrilla *Tupamaros*, a leftist armed group inspired by the Cuban revolution.[188] He was shot six times and spent 14 years in jail. Most of his detention was spent in harsh conditions and isolation, until he was freed in 1985 when Uruguay returned to democracy.[189] Dilma Rousseff was a former guerrilla member, a group known for robbing banks and other anti-government acts. After three years in prison, Rousseff was released in 1973. In 2010 she was elected president of Brazil, and was reelected in 2014 for four more years.

United States' Relations with South America

The post-World War II period witnessed much political instability and social unrest in South America. The U.S. led the creation of the Organization of the American States (OAS) in 1948, which sought to prevent Communists from acquiring control in Latin American countries by well-meaning, if incomplete, American-supplied social and economic aid.[190]

Another significant U.S. policy move was attempted by President John F. Kennedy (1917-1963) in 1961. He initiated, with Latin American cooperation, the Alliance for Progress. The United States pledged

A crowd of people marching to support the election of Salvador Allende for president in Santiago, Chile (Source: Wikimedia)

$20 billion, to be matched by the other members of the alliance. After 20 years, the Alliance had done little to change basic conditions.[191] With the end of the Cold War, the United States began to take a longer-term, more economically focused view of Latin America.

In 1973, the democratically elected socialist president of Chile, Salvador Allende - an avowed pro-Soviet Marxist, was overthrown by the Chilean Armed Forces. This historical fact is usually offered as an example of U.S. interference in the region, given the well-known U.S. support for the coup.[192]

Tip - Perceived past U.S. political interference in the region and support for military regimes contribute to significant present-day anti-American feelings. Avoid discussing recent political history related to the

twentieth century and beyond, as the country you are operating in could still be very polarized on these issues.[193] If the topic of military regimes come up with your local military counterparts, refrain from referring to these governments as "dictatorships," and do not use the word "coup." Always refer to these governments as "military governments."

Other Significant Events of the Twentieth Century

• **1990-2000:** Alberto Fujimori's presidency of Peru ends when allegations of corruption in his government emerged. He fled to Japan, but was jailed in 2007, and finally convicted of human rights abuses in 2009. He is currently serving a 25-year prison sentence.[194]

• **1993:** Colombian Pablo Escobar, leader of the Medellín drug cartel, was killed by the Colombian police. He was responsible for years of assassinations of public officials in response to the Colombian policy of extraditing drug traffickers to the United States.[195]

• **2000:** The Guyana Basin, an oil-rich, under-explored area on the continental shelf of South America, between Guyana, Venezuela, and Suriname, was the focus of a maritime dispute between the three countries.[196] Tensions escalated when Venezuela's President Hugo Chávez revived a nineteenth century claim to more than half of the land area of Guyana.

• **2000-2012:** U.S.-Colombia **Plan Colombia** was implemented. [*See Plan Colombia details below*].

• **2009:** In Peru, 54 people were killed in clashes in the country's Amazon River region between security forces and indigenous people protesting against land ownership laws opening up oil and gas resources to foreign companies.[197]

• **2011:** U.S. Congress passed a long-delayed free trade agreement with Colombia.

• **2013:** While coca production in Colombia decreased with the eradication efforts of **Plan Colombia**, it increased in Peru. The United Nations World Drug Report stated that Peru had become the world's main grower of coca leaves - the raw ingredient for cocaine.[198]

• **2014:** The United Nations' highest court defines the maritime boundary between Peru and Chile after a bitter dispute between the two neighbors. Judges award Peru parts of the Pacific Ocean but awards rich fishing grounds to Chile.[199]

Plan Colombia (2000 to 2012)

Historical Background - In 1999, Colombia's leftist insurgency, *Fuerzas Armadas Revolucionarias de Colombia* (FARC) and the National Liberation Army (ELN) were carrying out terrorist activities. FARC- and ELN-led guerrilla violence was rampant, as were kidnappings for ransom and other serious human rights violations. Drug traffickers (mainly cocaine and heroin) were helping to perpetuate the conflict by funding both left-wing and right-wing armed groups.[200] There were also rightwing paramilitary groups, mostly coordinated by the United-Self-Defense Forces of Colombia (AUC). All three groups were labeled as Foreign Terrorist Organizations (FTOs) by the U.S. government in the late 1990s. The Colombian government, a key U.S. ally, was at risk of being toppled by those violent actors. At the time, Colombia had suffered some 2,000 terrorist acts; more than 3,000 kidnappings; homicide rate was nearly 60 per 100,000; the FARC then numbered an estimated 18,000; while roughly half of Colombia's national territory lacked a government security

presence. As a result, Colombia was on the verge of collapse.[201]

Plan Colombia: During President Andrés Pastrana's administration, the United States responded to the Colombian government's request for international support for Plan Colombia by providing substantial assistance designed to increase Colombia's counternarcotic capabilities.[202] From 2000 to 2012 the U.S. Congress appropriated more than $8 billion in assistance to carry out Plan Colombia and as Colombia's security and development conditions improved, former U.S.-supported programs have been nationalized to Colombian control.[203]

Plan successes: Between 2002 and 2008, Colombia saw a decrease in homicides by 44 %, kidnappings by 88 %, terrorist attacks by 79 %, and attacks on the country's infrastructure by 60 %.[204] Plan Colombia was the most significant U.S. policy initiative in the Western Hemisphere in recent times. Although the plan prioritized counter-narcotics operation – and specifically the eradication of coca in southern Colombia – it also provided assistance for the judiciary and economic development.[205] The Plan was a win-win for the U.S. and Colombia because it contained the chaos and violence pervading Colombia, while the "U.S. foreign policy furthered its goals in the hemisphere of protecting democracy and defending human lives."[206] Additionally, Plan Colombia demonstrated that the U.S. could successfully achieve security aims with a limited investment of military force: the U.S. maintained a supportive function, providing personnel within legal bounds of only 800 military and 600 private contractors in a year (2004).[207]

Shortcomings of the Plan: Critics claim that the plan did too little to improve the human rights situation in conflict zones. They argue that lack of emphasis in sustainment of security gains was responsible for demobilized combatants becoming involved in criminal activities. Three thousand innocent civilians were killed by the Colombian army, and aerial spraying caused the displacement of vulnerable populations, environmental damage, and the dispersal of coca cultivation -- the so called "balloon effect" in which efforts to eliminate drug production or trafficking only cause it to move to another country.[208]

Current efforts: In 2013, the U.S. Department of State allocated $114 million (a $16.4 million decrease from 2012) to "continue supporting Colombian-led interdiction and eradication efforts as the Colombian Government works to implement its National Consolidation Plan. Additional support will expand local drug prevention programs and enhance the Colombian National Police's capability to maintain a security presence in former conflict and drug trafficking regions, while expanding access to state institutions and services in these regions. Much of the decrease in the FY 2013 request is due to the successful nationalization of the Colombian Army Aviation and Counterdrug Brigade programs in FY 2012, which resulted in no request for funding in FY 2013."[209]

Historical Timeline: Twentieth Century

Colombian Child Soldiers

Brazilian Pilots in WW II

"Shining Path" Guerrilla in Peru

FARC rebel soldiers, Colombia

The War of a Thousand Days killed tens of thousands in Colombia

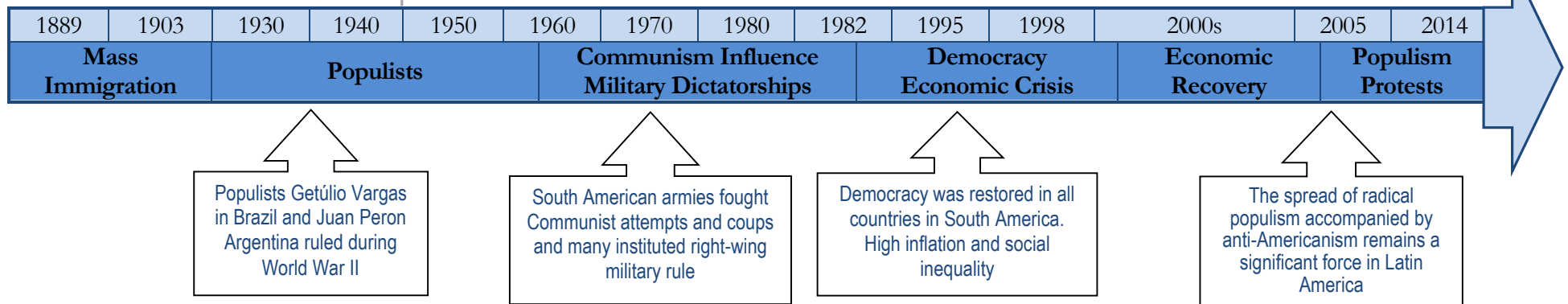The Cuban Revolution led by Fidel Castro fomented Marxist inspired violent guerrillas throughout the region

The Falklands War, or *Malvinas* War, between Argentina and Great Britain

U.S. - Plan Colombia designed to provide substantial assistance to increase Colombia's counter-narcotics capabilities

Current problems: violence, illegal drugs, trafficking and transnational criminal organizations

1889	1903	1930	1940	1950	1960	1970	1980	1982	1995	1998	2000s	2005	2014
Mass Immigration		Populists				Communism Influence Military Dictatorships			Democracy Economic Crisis		Economic Recovery		Populism Protests

Populists Getúlio Vargas in Brazil and Juan Peron Argentina ruled during World War II

South American armies fought Communist attempts and coups and many instituted right-wing military rule

Democracy was restored in all countries in South America. High inflation and social inequality

The spread of radical populism accompanied by anti-Americanism remains a significant force in Latin America

Government and Politics

Why Government and Politics Matter to You as a Marine

Most people live in states governed by formal and informal institutions. Marines need to know how power and authority are distributed in the state by studying the formal and informal structures of governments in the region. In addition, Marines need to understand how people, groups, and institutions exercise power and authority, in other words, what comprises politics in the states.

Government and Politics

Currently, all 12 countries in South America are democratic republics, with executive, legislative, judicial branches, and democratically elected leaders.[210] However, most regional democracies experience challenges, in varying degrees, to democratic institutions such as weak judicial systems, radical political populism and corruption in politics and governance.

Weak Judicial Systems

The judicial branches of South American countries tend to be politically vulnerable and inefficient, lacking the ability to provide proper checks and balances on the executive branch.[211]

The judicial branch is part of the government, along with the legislature and the executive. The judicial branch is independent of other branches. This branch has the sole authority to issue binding opinions on the constitution and laws.[212]

Societies that do not trust their institutions are often societies that have a high crime rate, like many of the countries in South America. In the cases of Colombia and Brazil, the challenges with the administration of justice are structural, thus affecting all spheres of judicial intervention. The most visible effects are a severe legal backlog, crowded prisons, and high levels of impunity.[213]

Colombia has the third slowest justice system in Latin America, with an average of 1,346 days to reach a decision, while a judicial proceeding can take up to ten years to be resolved. The rate of impunity was 80 % by 2008.[214] With Plan Colombia, the U.S. has invested a considerable amount of resources into the new Colombian judicial system.[215] However, these American-led efforts have not produced the expected results, and a recent poll in Colombia has revealed that almost one in six people arrested in the country are sent to prison.[216] Judicial officials say legislation designed to ease prison overcrowding is partially to blame for this culture of impunity.

In Brazil, homicides have risen 132% during the last 30 years, but contrary to popular belief, growth in organized crime and drug trafficking has not driven murder rates; instead, impunity and other judicial deficiencies have allowed violence to thrive. People murder each other for trivial reasons and go unpunished.[217] In Brazil and across the entire region, inefficient judicial systems, impunity, and corruption play an absolutely crucial role in spurring and perpetuating violence.[218]

Former Peruvian President Fujimori's authoritarian rule left a legacy of impunity, and greatly damaged the impartiality of Peru's judicial system.[219] In the *2012-2013 World Economic Forum,* Peru ranked 125th out of 144 countries for judicial independence.[220]

In Venezuela, the judiciary is politicized and almost incapable of carrying out independent investigations.[221] The former Chavez government manipulated cases for political reasons, with judges and prosecutors dismissed for opposing Chavez allies.[222] The government's decreasing effectiveness in enforcing the rule of law helps explain why Venezuela has one of the highest homicide rates in the world.[223]

Rise of Populism

Populism in Venezuela - Venezuela, an oil-rich country, is prone to come under the political influence of populist leaders, such as former President Hugo Chavez. He used the world's biggest oil reserves to aid the poor, and to gain political leverage by subsidizing gas for all. Venezuelans' quality of life dramatically improved at the third-fastest rate world-wide.[224] However, his radical populist policies and those of current President Nicolas Maduro, named by Chavez as his "legitimate successor," were unsustainable in the long run.[225] Venezuela's economy is currently on the brink of ruin, with 57 % inflation, shortages of food and other household goods, and the highest murder rates and criminality in the region.[226]   Chavez inspired other left-leaning South American countries such as Ecuador, Bolivia, Brazil, and Argentina. The former leader embraced some cultural beliefs and value systems that have prevailed throughout Latin America's history: *Personalismo* - the practice of glorifying a single charismatic leader instead of an ideal or party; and *Caudillismo* - power based on violence and personal relations. Chavez also perfected the art of keeping himself perpetually in power as the *comandante eterno* (eternal commander): he undermined democratic institutions; eliminated checks and balances; ignored the rule of law; promoted rampant nepotism; and controlled the media with state-sponsored television, which made his policies believable to the masses. After his death, his policies were carried over by his followers who are maintaining his "mythical status." Devotion and loyalty to Chavez "holiness" is a requirement for access to public office – not competence or performance.[227]   Chavez's appointed successor and political heir, President Nicolás Maduro, has fully benefited from a severely distorted "democratic system" created by Chavez. Maduro, won an unfair election that allowed him to win with only a 1.5 % margin.[228]

Maduro administration's leftist urban militias known as *Colectivos* (or Collectives) violently suppress protests (Source: Insightcrime.org)

Corruption in Politics and Governance

According to Transparency International, corruption affects every aspect of governance and undermines democracy:

> "From children denied an education, to elections decided by money not votes, public sector corruption comes in many forms. Bribes and backroom deals don't just steal resources from the most vulnerable – they undermine justice and economic development, and destroy public trust in leaders."[229]

The 2013 Transparency International Perception of Corruption Index ranks countries and territories based on how corrupt a country's public sector is perceived to be; a score below 50 indicates a serious corruption problem. In South America, Venezuela, with its Corruption Index ranking of 20, is considered to be the most corrupt country, followed closely by Paraguay and Guyana. Chile and Uruguay rank almost equally to the United States, with a score of 73, and are seen as the least corrupt countries in the region. However, all the other remaining countries in the region present high corruption indexes.

South America Corruption Perception Index
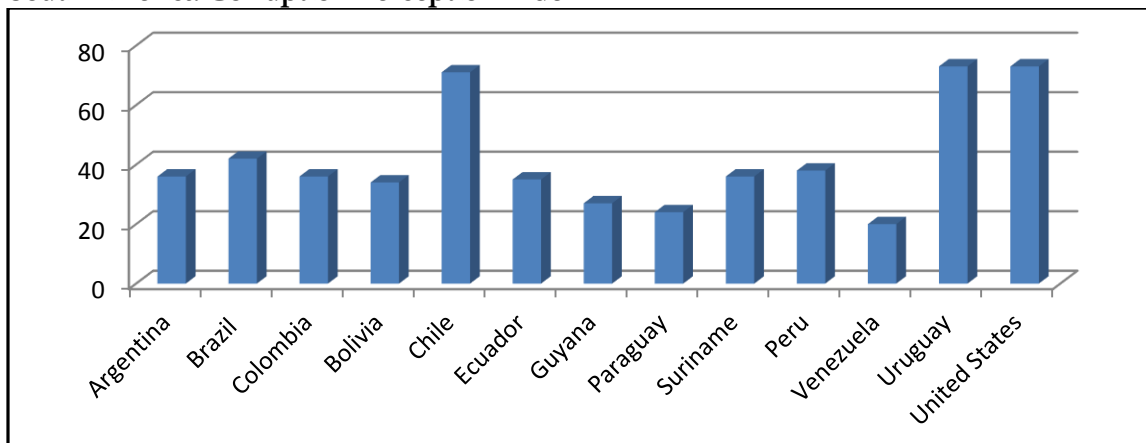
Source: Transparency International – 2013

The region experiences daily scandals in all echelons of government. In Brazil, a high circulation magazine developed a "scandal database," an interactive timeline, with search tools to track corrupt officials by name (or scandal name), by year, or by party affiliation.[230] The Brazilian "PT" (Workers Party) socialist administrations', from former President Lula to President Dilma Rousseff in 2014, generated more corruption scandals than all previous administrations combined.[231] The corruption scandal that forced the impeachment of former President Fernando Collor in 1992 pales in comparison to the multi-billion dollar political corruption schemes currently under investigation in Brazil.

In addition, to the main characteristics of the political systems described above, there are a few more indicators that effectively provide an idea of the real state of democracy in a given country.

Freedom of Press, Social Media, Social Unrest and Mobilization

Most countries in South America have large and relatively free media sectors, with broadcast television, radio, and the press being the largest sources of information for most people. People's ability to get unbiased and objective information in South America has been increasingly threatened. Freedom House reports that South America has seen considerable backsliding in the past decade, with an increase of violence against journalists who report on crimes and political scandals, and "sustained government hostility" to media criticism.[232]

The governments of these countries claim the media is a major obstacle to their efforts to transform the region, accusing the media of exaggerating crime reports and fabricating corruption scandals. Advocates of these governments argue that their efforts are serving to "democratize" the media, by removing the perceived monopoly of information from the hands of a few wealthy families, who, according to them, use the media to further their political agendas.[233] For example, in Ecuador, President Correa used this excuse to veil repressive tactics to regulate public opinion and silence dissent by launching a multifaceted assault on the press.[234]

Government hostility towards the media has been seen in Venezuela, Bolivia, Ecuador, and Argentina. In Venezuela, during the anti-government protests in February 2014, TV and radio stations did not report on the protests, in a deliberate effort by President Maduro's government to choke off all independent sources of information about the crisis.[235] Venezuelans had to resort to utilizing social media - Twitter, YouTube, etc.[236] However, after graphic images of injured protesters appeared on Twitter, Venezuelan Internet Service Providers (ISPs) blocked the site that hosts Twitter images, rendering photos inaccessible within the country.[237]

A wave of protests swept Brazil during the summer of 2013 as tens of thousands of people took to the streets in cities throughout the country to demonstrate against corruption, inadequate public services, and the expense of staging the 2014 World Cup.[238] The magnitude of these street protests was largely reported as having been a direct result of social

Opposition march in Caracas Venezuela, February 12, 2014 (Source: Wikipedia)

media reports, with users quickly posting comments and pictures that served to galvanize thousands of people to take to the streets.[239]

Protesters on *Congresso Nacional*, "The House of the People" in Brasília, Brazil on June 17, 2013 (Source: Wikipedia)

People and Society

Why People and Society Matters to You as a Marine

Missions across the range of military operations require Marines to understand, and work with, foreign populations. Knowing the people in the region -- including their ethnicities, languages, and religions, as well as the way they live in social entities -- enables Marines to create a mental picture of the human dimension of the region.

Demographics

The total South America population is about 387 million people (2011). Brazil is the most populous country; the Guianas (Guyana and French Guiana) are the least populated.

South America Population
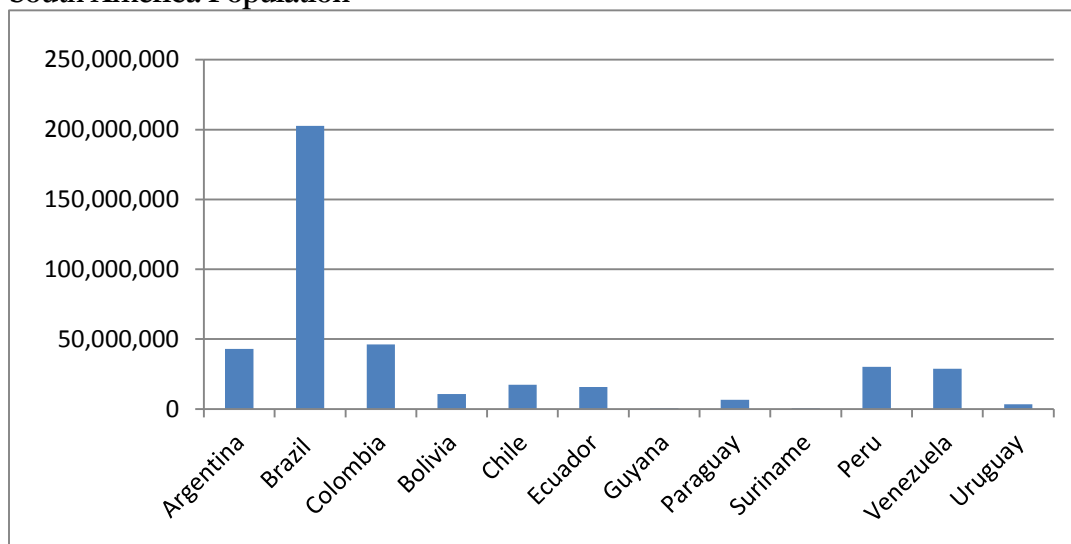
Source: CIA World Factbook, April 2014

Population Distribution – Urban and Rural Areas

The Human Footprint ver. 2
South America

The Human Footprint Index

The Human Footprint Index (HF) expressses as a percentage the relative human influence in each terrestrial biome. HF values range from 0 to 100. A value of zero represents the least influenced - the "most wild" part of the biome with value of 100 representing the most influenced (least wild) part of the biome.

Human Footprint Index

1   10   20   30   40   60   80
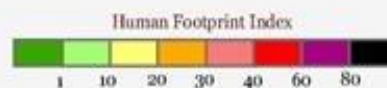
Source: SEDAC/CIESIN – Columbia University

Urban Areas

South America has high urbanization rates, but urban growth has been concentrated in the largest cities and near the coasts, where, frequently, one quarter or more of the total population resides.[240] Approximately 80 percent of the populations of Brazil, Argentina, Venezuela, Chile, and Uruguay live in urban areas.[241] In the rest of the region, this percentage stands between 60 percent and 79 percent.[242] The one regional exception is Guyana, with a much smaller urban population of 29 percent.[243]

Urban Agglomerations in South America (2011)

Growth Rate		City Population, 2011	
	<1%	○	750-1,000 thousand
	1-3%	○	1-5 million
	3-5%	○	5-10 million
	5%	▢	10 million or more

Source: United Nations
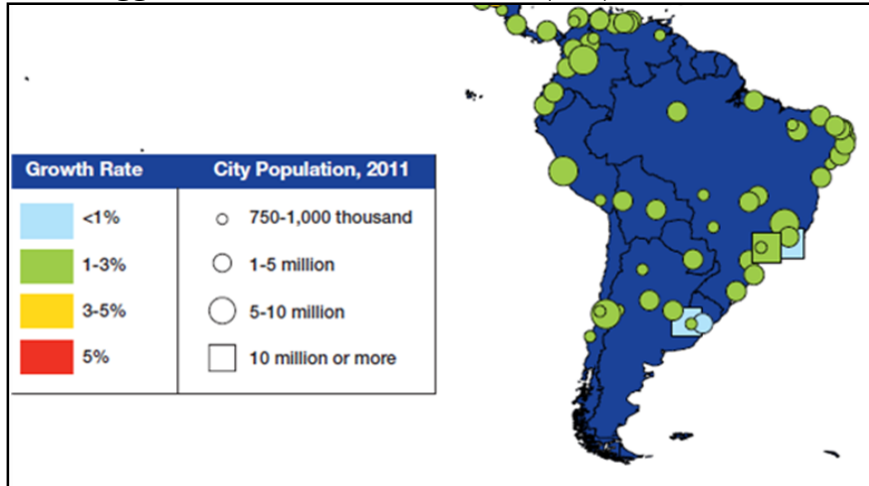
In Argentina, 35 percent of the population lives in Buenos Aires, while in Chile, almost 40 percent of the population lives in Santiago.[244]

In Brazil, the mega-urban region stretches from the country's largest city, São Paulo, to its second largest city, Rio de Janeiro. Together they are home to 43 million people, approximately 21 percent of the Brazilian population.[245]

Urban Problems

The reality is that large South American cities are unable to adequately absorb a great influx of people.[246] Brazil saw a massive exodus of rural dwellers towards the main urban centers of São Paulo and Rio de Janeiro from the 1950s to 1970s; this led to the growth of informal settlements known as "*favelas*."[247] The inequality and poverty of the country as a whole was intensified in *favelas*, which lacked state presence; made them ideal breeding grounds for the expansion of organized crime.[248]

Favela (slum) in Rio de Janeiro, Brazil (Source: Photo by Denise Slater, CAOCL)

Large shantytowns developed in most of South America's largest cities. Many individuals could not find a place to live or get a job, and they took over unoccupied land or settled in existing slums or shantytowns. These shantytowns are crime-ridden, overcrowded, have narrow and unplanned streets, lack most utilities, and frequently develop in places where physical conditions are difficult, such as on slopes prone to mud-slides.

Rural Areas

Since colonial times until the mid-twentieth century, agriculture in Latin America presented two extreme patterns throughout the region: great estates – *haciendas, estancias* – on one end; and, on the other end, small peasant plots growing subsistence crops.[249] As land was often the basis of prestige in colonial societies, elite estate families, prominent in political affairs, resisted land reform.[250]

Land reform has been promised by South American politicians since colonial times. Land re-distribution has been promoted mostly by left-leaning political parties and the Roman Catholic clergy, or was a part of the political agenda of violent guerrillas in the 1960s and 1970s.[251] Despite some positive successful land reform initiatives, problems remain. Land reforms still have many advocates, but since urban areas now contain most of the population, the reform movement has diminished and lost a political base.[252]

Many migrants from rural areas perceived urban areas as possible centers of advancement, and preferred the wages that they could earn working in the city. The main reason for that perception was because rigid hierarchical rural societies offered little opportunities for social mobility. Access to land was controlled by large landowning elites, and rural areas lacked utilities, adequate education, and medical services.[253]

For example, in Peru, migration occurred primarily from the Andean communities to the rapidly growing cities in the Pacific coast.[254] The impact of migration from the Andean communities was largely negative, since it left those communities with an aging population and decreased economic activity.[255] This migration process has also altered cultural traits, since "almost half of all Peruvian domestic workers in Lima are peasant women from rural areas and Indian communities that got partly assimilated into *mestizo* culture."[256]

In South America, large distances and challenging geographical features like the Amazon rainforest, with 70 % of its territory being interwoven with rivers and forests, make it difficult for governments to provide basic services and infrastructure to the scattered population.[257]

In addition to the problems faced by rural areas, millions of South Americans live in scattered, isolated areas. In many instances, the armed forces are the sole representative of the government and their civil affairs; humanitarian assistance and disaster relief operations are the only state sponsored assistance these populations receive.[258] To deal with this reality, many armed forces state in their constitutional mission statement their responsibility to provide basic services, civil affairs support, disaster relief, and humanitarian assistance to distant rural area that lack development or state presence.[259]

The boat known as "*Tribuna – a Justiça Vem a Bordo*" (Tribunal – Justice on Board) brings legal services to the isolated communities in the Brazilian state of Amapá (Source: Insightcrime.org)

Languages

Brazil is the only Portuguese-speaking Latin American country, and its Luso-Brazilian culture differs in subtle ways from the Hispanic heritage of most of its neighbors. With the exception of Brazil, Suriname, the Guianas, and the Falkland Islands, most of the countries in South America speak Spanish. However, it is important to

note that nearly half of the region's population does not speak Spanish. This is mostly because the combined population size of the region's non-Spanish speaking countries, comprised mostly of Brazil, where almost half of the region's population lives.

Languages Spoken in South America

- **Spanish**: Argentina, Bolivia, Chile, Colombia, Ecuador, Paraguay, Peru, Venezuela, and Uruguay.
- **Portuguese:** Brazil
- **Dutch**: Suriname
- **English:** Falkland Islands and Guyana
- **French:** French Guiana
- **Guarani**: Guarani is an official language of Paraguay
- **Indigenous Languages**: The most widely spoken are Quechua, Aymara, and Guarani. Peru has the largest community of Quechua speakers, with an estimated 4.5 million speakers (19 percent of the Peruvian population)
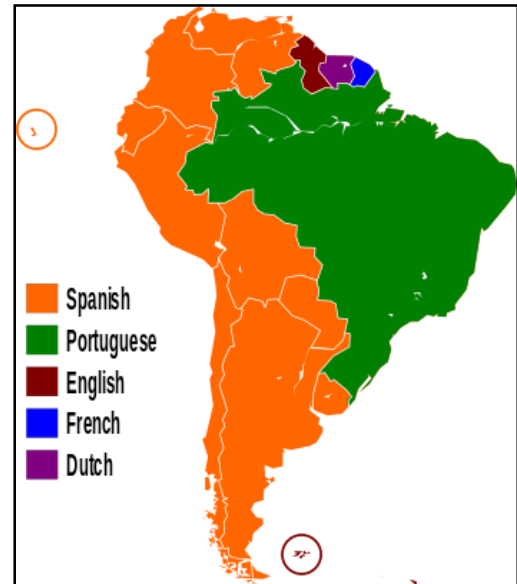
Religion

The Catholic Church

Source: Wikipedia

The Roman Catholic Church has historically exerted a strong influence on political and social behavior in Latin America. Since the conquest, Catholic teachings were offered by Jesuits and Franciscans, resulting in an integration of the Catholic faith into Latin America.[260] However, this intertwining of Catholic faith and colonialism has proven to be problematic for the Catholic Church, since critics of the Church contend that Catholicism took part in colonialism, imposing economic and political hardships in the region.[261]

In the 1970s, when Marxism was disseminated in Latin America, a populist and social activist religious movement grew among the clergy in Peru. Gustavo Gutiérrez, whose 1973 book, *A Theology of Liberation* gave the name to this religious movement, combined elements of Marxist political activism with Catholic teaching.[262] Liberation theology viewed Jesus as a revolutionary, destined to liberate the poor and oppressed. The movement challenged the Church to reevaluate its theology and mission with a "preferential option for the poor."[263] This doctrine of class struggle has remained a source of controversy in the larger church.

The so-called "Theology of Liberation" was incorporated into violent guerrilla ideology throughout the region. For example, the Colombian National Liberation Army (ELN) was from the beginning, a highly ideological outfit, combining its Marxist-Leninist outlook with Theology of Liberation.[264] Some of the group's first recruits came from the church, including Camilo Torres, a popular and outspoken Colombian priest who died in his first battle in 1966.[265]

By the 1980s, as South America embraced democracy, the influence of Theology of Liberation in Latin America diminished. Pope John Paul II revised Church doctrine in order to focus more work on behalf of the poor;

however the Pope officially condemned the teaching of Theology of Liberation.[266] However, its influence remains strong in Latin America.[267]

The Decline of Catholicism in South America

The majority of South Americans (about 92 percent) are Christian, and the Roman Catholic Church being the largest denomination.[268] Although Brazil has the largest Catholic population in the world, Catholicism is declining.[269] Catholicism has declined from 92 percent of the population in the 1970s, to 65 percent of the Brazilian population in 2010.[270] This trend has been primarily attributed to the rise of evangelical churches.[271]

An important factor that may provide a boost for Catholicism in South America, was the 2011 ascension of Pope Francis, the first South American Pope ever. Originally from Argentina, Pope Francis has active views regarding poverty and inequality, calling for greater efforts to lift up the world's poor.[272] His views are in tune with most populist discourse currently prevailing in South America, and may help revitalize Catholicism in the region.

Evangelical Churches

Pentecostalism was introduced to Latin America by U.S. missionaries a century ago, and has gained masses of followers in recent decades in countries like Brazil, especially among the urban poor who feel neglected by the dominant Catholic Church.[273]

Universal Church of the Kingdom of God in São Paulo, Brazil (Source: Wikimedia)

Definition: The term "evangelical" is used in Latin America to describe various denominations, including Baptist, Methodist, and Pentecostal. It is the fastest growing religion in Latin America, with more than 15 percent of the population (about 44 million people).[274]

In the 1970s, membership to the Catholic Church declined while evangelical churches saw a dramatic increase.[275] Evangelical expansion is mostly a result of conversions from the Catholic faith, and Evangelicals – particularly Pentecostals – have prioritized working among the poor and marginalized.[276]

Evangelicals are especially well-equipped to connect to Latin Americans in general. Evangelical worship and theology is particularly appealing to Brazilians, with its energetic preaching, emotional prayer, and singing. Evangelicalism has proven to be more popular than the liturgical masses of the Catholic Church.[277] Additionally, Protestantism has also swept the country because it offers more social support in prayer groups and gives rural migrants a feeling of security in large cities.[278]

This upward trend in the increase of evangelical churches will most likely continue. In Brazil, while Catholic priests are banned from running for public office, evangelical churches actively encourage their pastors to engage in politics. Leaders of evangelical churches often use the pulpit to persuade their followers who they should vote

for.[279] In Brazil's national election in 2010, evangelicals increased their presence in Congress by 50 percent, and currently has 68 seats in the Chamber of Deputies and 3 in the Senate.[280]

Religious Syncretism

During the colonization of South America, the Spaniards, in converting the indigenous people to Catholicism, followed a deliberate strategy of tolerance for religious syncretism that was used throughout the Americas.[281] This process sought to substitute Christian saints for local deities, often using existing native temple sites as the location of churches.[282] Many of the biblical lessons and stories were taught through dramatic reenactments of those events at fiestas that permitted people to memorize the tales and participate in the telling.[283] For instance, in Peru, thousands of Andean fiestas were based on such foundations.[284] The annual celebration of a village's patron saint day will, for example, often coincide with an important harvest period; a pre-conquest harvest observance will sometimes be reinterpreted as a Catholic feast day.[285]

> **Religious syncretism** is defined as the "fusion of diverse religious beliefs and practices (…)"[286]

Another example of religious syncretism occurred in Brazil, where a blend of Roman Catholicism and numerous Afro-Brazilian cults are now widespread in the Brazilian states of Bahia and in Rio de Janeiro: *Candomblé* is a religion that combines African animist beliefs and some aspects of Catholicism.[287] Black slaves in Brazil were prohibited from worshipping their animist gods, so in an attempt to get around this religious prohibition, the slaves disguised their gods as Catholic saints and worshipped them in rituals often practiced on the particular holiday of each saint.

Although *Candomblé* is practiced in other countries, it is mostly practiced in Brazil, where it first originated.[288] Syncretism in Brazil also occurred because of the compatibility of the different belief systems.[289] For example, *umbanda* is blended with Christian-based spiritualism; while at the other extreme, *macumba* incorporates black magic, which can be used for either good or evil purposes.[290] *Macumba* practitioners leave offerings of chicken, rum (*cachaça*), flowers, and candles at crossroads, beaches, and other public places.

Religious Holidays

Many of the national holidays in this region are religious in nature and are heavily influenced by Catholicism. Some of the most important holidays include Easter weekend, and may include Good Friday and Easter Week. Christmas Eve and the day after Christmas are public holidays in several South American countries.

Although Carnival is not a religious holiday it is associated with religion, similar to *Mardi Gras* in New Orleans. Carnival is a "last chance to party" before Lent – the 40 days of fasting and sacrifice that Catholics observe before Easter.

Many public institutions in South American countries have religious allegiances. For example, the Peruvian armed forces celebrate the day of their patroness, the *Virgen de las Mercedes* (Virgin of the Mercedes - Our Lady of Ransom), with pomp and high-level participation around the country.[291]

Icons - Soccer

Fútbol (Spanish) or soccer has been ingrained in South American culture since it arrived in the continent some 115 years ago.[292] It became a true passion for South Americans, and nothing defines South American society as much as their team preference. South American nations have won half of the 18 Fédération Internationale de Football Association (FIFA) World Cup titles, and have produced some of the most famous players of all time.[293] Soccer is such a part of life there that it is often closely intertwined in the greater political and social fabric of each nation. The Brazilian National Soccer Team, *Seleção Brasileira*, leads in victories, having won five World Cup Championships.

Maracanã stadium in Rio de Janeiro, Brazil, sits 103,000 fans (Source: Wikimedia)

The political landscape of South America has been associated with the sport of soccer for most of the twentieth century. Soccer took root in the entire region, especially in Brazilian culture, impacting people on a personal level. During the tumultuous 1960s and 1970s, Brazil's victories in the World Cup coincided with times of political unrest, with fans expressing strong nationalism and fanaticism for the sport.[294] *Futebol* (Portuguese) provided a positive outlet for all Brazilians, even those of different political persuasions, to rally around.

In June 2014, Brazil hosted the FIFA World Cup and will host the 2016 Olympics in Rio de Janeiro. During the 2013 Confederations Cup in Brazil, more than a million people – angry over the lack of social services -- demonstrated on the streets nationwide in a single day, protesting the billions that have been spent on the World Cup and the 2016 Olympics.[295]

Similar to Brazil, Colombia has an obsession with soccer which has unfortunately become associated with violence and death.[296] Colombia's disappointing loss after an excellent performance in the 1994 World Cup, when it lost the title to the United States, was especially bitter for many fans. The Colombian coach and players received death threats from disappointed supporters.[297] Headlines in *La Prensa* in Colombia, captured the national spirit with the defeat "Humiliated by the United States;" and *El Tiempo* reported one fan saying "if we aren't capable of beating the gringos, then we aren't worth anything."[298]

Sadly, the death threats proved to be real, Andrés Escobar, the player that had accidentally scored an own-goal during the infamous match, was murdered a week later.[299] Escobar's murder was just one of many soccer-related homicides in Colombia in the decade that coincided with the rise of violent drug cartels, with many asserting that the largest soccer clubs were owned by the cartels.[300]

Politics and soccer also played an important role in Argentina. When the country hosted the 1978 FIFA World Cup amidst political turmoil, the military junta tried to eliminate "all signs of political dissent."[301] Argentina won its first World Cup title and the junta exploited the victory as a way to prove the "excellence of the nation," but it was not until the 1986 World Cup in Mexico that Argentina won a title not clouded by the military junta. The Argentinean player Diego Armando Maradona Franco ("Maradona"), scored the winning goals. In reference to

Argentina's loss of the Falkland Islands to England in the 1982, Maradona later described the game as "war against the English, one that the Argentineans emerged victorious."[302]

TIP – Due to strong rivalries between teams and countries, it is best for Marines while in South America, to play soccer games in mixed teams, and talk about the sport at an international level.

Social Classes

Throughout Latin American societies, rigid social structures of caste-like elite were established during colonial times. This social structure was based on class membership and skin color, and has promoted limited vertical mobility.[303] These colonial societies had small elites at the top, comprised of Spanish or Portuguese descendants, who were educated, rich, and politically powerful.[304] There was also a small middle class, comprised of merchants and minor officials and a large lower class composed of workers and peasants.[305]

This class system has evolved in the twentieth century, with modernization, industrialization, improvements in transportation, education, and rapid urban growth. However, in many ways the modern social structure still presents many traits of early rigid societies, one in which social class and status are important, and govern daily social interactions.[306] Social classes are distinguished by occupation, lifestyle, income, family background, education, accent, and access to power.[307]

A 2013 World Bank report, entitled *Economic Mobility and the Rise of the Latin American Middle Class*, asserts that after decades of stagnation, the size of the middle class in Latin America and the Caribbean have recently grown by 50 percent - from approximately 100 million people in 2003 to 150 million (or 30 percent of the continent's population) in 2009.[308] Over the same period, the proportion of people in poverty fell from 44 percent to around 30 percent.[309]

The report also explains that, presently, the largest social group in the region is neither poor nor middle-class: they are a vulnerable group sandwiched between the poverty line and the minimum requirements for a more secure, middle-class lifestyle. The rise of the middle class reflects recent changes in economic mobility over the past 15 years, and at least 43 percent of all Latin Americans changed social classes, most of them moving upward.

Nevertheless, the authors of the World Bank study point out that it is important to note how "intergenerational mobility"- a concept inversely related to inequality of opportunity - has improved only slightly during the last decade, and remains very limited. This means that both educational achievement and attainment, for example, remain strongly dependent on parental education levels, thus reinforcing the difficulty of social mobility for those on the bottom.

Ethnic Groups

South America's ethnicity is primarily a mixture of European, African, and indigenous (or Amerindian) groups.[310] In some countries, there can also be clear economic differences between major ethnic groups; blacks, mulattos, and indigenous populations have historically been disadvantaged.[311] Such economic and cultural differences feed

Recommended Reading:

For understanding the race relations in Latin America:

"Race and Equality in Brazil: Cultural and Political Dimensions," *Latin American Perspectives*, Issue 149, Vol. 33, No. 4, July 2006

Peter Wade, *Race and Ethnicity in Latin America*, 2nd Edition (Pluto Press).

racial and ethnic discrimination. In most South American countries, people of white ethnicity are more likely to be in the wealthier segments of society.

<div style="border: 1px solid #000; padding: 10px;">

Definition - Ethnicity is defined as "the identification of an individual with a unique subgroup in a society, which is distinguished by specific behaviors, characteristics, and social symbols that can include a language specific to the group; symbols reflecting group membership; unique traditions, rituals and holidays; clothing unique to the group and/or a shared sense of history and attachment to a place or region."[312]

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Main Ethnic Groups

Euro-Latinos (white Latinos): Descendants of European colonizers and immigrants. Although South America's dominant culture and political structure is primarily European, only Argentina and Uruguay have predominantly European-descendent populations.[313]

Mestizos **("Mixed blood," in Spanish) or** *Pardos* **(in Portuguese)** refers to people of mixed heritage (Indigenous and European ancestry). The majority of people in the region have mixed heritage. Along with whites, *mestizos* are mostly found in the higher and middle social classes. The populations of Colombia and Venezuela are mainly composed by *mestizo* populations with large minorities of European ancestry in the large cities and large numbers of mulattos along the coasts.[314]

Amerindians: There are roughly 40 million indigenous people in Latin America today. These communities are primarily concentrated in the Western Highlands (Ecuador, Peru, Bolivia, and Chile).[315] Indigenous groups can also be found in the Central Lowlands of the Amazon Basin. The Amerindian influence is widespread in South America. In 1975, Peru adopted Quechua as its second language, a testimony to the continuous importance of the indigenous culture.[316]

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Cultural change - Many Amerindians are entering the modern world and abandoning their traditional, ethnic traits. One of the main distinctions one could observe in the population would be the choice of clothing. If they wear western clothes, they want to be called mestizo; if they wear traditional clothing, they still identify with their indigenous background.[317]

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Asian-Latinos: Latin America also has a small number of people of Asian descent. East Asian communities (primarily Japanese and Chinese) can be found in Brazil, Peru, and Paraguay.[318] South Asian communities (primarily Asian-Indian) are prevalent in Trinidad and Guyana.

African-Latinos: There are approximately 80 million descendants of slaves in South America. African-Latinos are mostly located in the Northern part of South America (Colombia, Venezuela, Guyana, Suriname, and French Guiana); the Northeastern regions of Brazil, the Caribbean islands, and the Atlantic coast of Central America.[319]

Ethnicity and Race Relations in Brazil – A Complicated Matter

Racial identification is extremely fluid in Latin America, and is often based on social and cultural factors as much as physical characteristics or ancestry.[320]

In Brazil, the large numbers of black African descendants, the heritage of a long history of slavery, mixed with Europeans and natives, created a population distinct from the ones found in neighboring countries.[321] Northeastern Brazil has a large black and mulatto population, while the Brazilian state of Bahia became the heart of Afro-Brazilian culture, where Portuguese and African religions and cultures blended.[322]

It has been a source of great pride for Brazilians to say that Brazil is a racial democracy. Until the late 1990s, the official discourse regarding ethno-racial groups in Brazil was their relations were "harmonious and problem free."[323] However, discussing matters of race was taboo in Brazilian society until 2001, the year when a government-sponsored proposal for admissions quotas for black students in public universities encountered huge opposition.[324]

The main argument against the race-based affirmative action was the notorious lack of rigidity in racial classifications in Brazil, and the nation's high levels of inter-racial marriages or miscegenation.[325] In race surveys, Brazilians identified themselves as *morenos,* but rejected the *pardo* classification which they considered insulting (*pardo*: all multiracial individuals not classified as white, black, or yellow).[326] The problem is that everyone in Brazil considered themselves *morenos*, except blonds and redheads.

A bipolar categorization method of "white" and "non-white" indicated that there were no significant socioeconomic differences among blacks and *pardos,* but both groups differed considerably from whites.[327]

Black activists contend that official surveys and Brazilian intellectuals are incapable of identifying who is black in Brazil, even though the police, the justice system, public, and private employees continue to discriminate against them.[328]

Machismo

Machismo represents the dominant ideal of manhood in Latin American society – it includes contradictory traits: an authoritarian image, the breadwinner image, the virility image, and the chivalry image. The negative attributes of *machismo* include bravado, violence, selfishness, disrespect, irresponsibility, and womanizing; while positive attributes include bravery, respect, responsibility, and altruism toward their families and less fortunate members of society.[329]

Machismo: The Merriam-Webster dictionary defines *machismo* as: "Exaggerated pride in masculinity, perceived as power, often coupled with a minimal sense of responsibility and disregard of consequences". In machismo there is supreme valuation of characteristics culturally associated with the masculine and a denigration of characteristics associated with the feminine. It has for centuries been a strong current in Latin American politics and society. *Caudillos* (military dictators), prominent in the history of Latin America, have typified machismo with their bold and authoritarian approach to government, and their willingness to employ violence to achieve their ends."[330]

Machismo is a strong construct that affects the social order in the Latin American context. However, it is important not to generalize and view all men through the negative lens of machismo stereotype. Machismo is expressed with variations between social-economic classes and age groups; machismo differs between rural settings to urban areas, and between countries. Recent social changes have promoted ideological shifts and behavior modification, minimizing gender gaps and behavior. In a broad stroke, for younger generations, for the more educated, and in urban areas, there is likelihood to display less *machista* tendencies; but the opposite is true for older age groups, for the less educated, and in rural settings.

According to social scientists, "Latino men are aware of mounting criticisms of traditional machismo from younger men and women of all ages."[331] Many men are abandoning dominant masculine ideals and favor the fair treatment of women; however these men are often unaware of the patriarchal attitudes that remain in their beliefs and attitudes.[332] Behavior changes sometimes occur unevenly, resulting in contradictory combinations in everyday life where some historical aspects of machismo coexist with increased egalitarianism, perhaps in ways invisible to its actors.[333]

Tip: Because of widespread machismo in Latin America, while interacting with South American armed forces members, never make a soldier lose face; especially an officer, much less a superior officer.[334] Constructive criticism must be cautiously offered in a positive manner.[335]

Gender Inequality in Latin America

There are growing similarities between the United States and Latin America regarding the position of women in society. For example, different gender issues confront traditions and institutionalized social relations such as abortion and family law. In many Latin American countries, abortion is still considered a crime -- largely because of the predominance of Catholicism in the region.[336]

In Latin America, indicators on gender inequality in primary school education, employment, and income have improved over the past decade, but there are still significant gaps between the status of women and men in this region characterized by highly patriarchal systems.[337] For instance, in Latin America, a woman with 13 or more years of education still earns 37 % less than a man with the same level of qualifications.[338]

Wherever educational opportunities are provided, women are more likely to enroll in higher education than men. In a majority of Latin American countries, there are more females than males enrolled in higher education.[339] As a result, an increasingly larger number of women are professionals or business executives.[340] For example, Brazilian women are at the helm of 13.7% of the largest companies - more than double the 6% from 2001.[341] Progress has also been remarkable for the representation of women on corporate boards, but forecasts indicate that it will only be by 2035 when women can expect to achieve equal participation on boards.[342]

Women in the Military in South America

Since the middle of the twentieth century, the regional trend has been to incorporate women in the armed forces. Despite the low level of incorporation of women in the armed forces, and the fact that incorporation in military careers is still recent, many military institutions in South America have women in their cadres. The numbers vary by country, but the average of women in the military in the region remains at 4 percent, with the largest number across the ranks (15.9 percent) in Uruguay, and the lowest (0.4 percent) in Bolivia.[343] As for the presence of commissioned officers in the army, Brazil has the highest female presence (16.4 percent), followed by Argentina

(13.3 percent). According to available data, Bolivia is the country with the lowest amount of officers, at 2.5 percent.[344]

In South America, Paraguay, in 1932, led the way in parity for women by admitting them into the army.[345] In 1981, the Brazilian navy was the first of the country's three military branches (navy, army, and air force) to accept women.[346] Since 1982, Argentina, Bolivia, and Colombia admitted women as professionals into their armies.[347]

However, women in Chile had to wait until 1995 until they were allowed serve as officers in military; until 1997 for women in Argentina and Peru; and 2008 for women aspiring to the senior military ranks in Colombia.[348] It took Brazil even longer: it was not until 2014 that the Brazilian Naval Academy accepted 12 women (among 867 men), and marked the first time the country's oldest military institution had opened the doors of its officer training course for women.[349]

In 2014, for the first time ever, Brazil's Naval Academy admitted women to its officer training course (Source: Infosurhoy, Photo by Renzo Gostoli)

The fact that military institutions started to open their doors to women has not necessarily translated into significant change. In many countries women still face various obstacles in their military careers.[350] For instance, in 2009, the United Nations peacekeeping mission in Haiti (MINUSTAH), was mainly made up by Latin American forces, and counted only 108 women among a contingent of 7,030 military troops (just 1.53 percent female).[351]

Education

Most countries in Latin America provide schooling for children up to the primary level. In remote areas, or parts of countries inhabited by ethnically separate groups, schools tend to be of poor quality and attendance is erratic.[352] At the secondary level, inequalities are strongly accentuated: families with above-median incomes opt for private schools, and poorer families often have no other recourse than to send their children to inadequately equipped schools with poorly trained teachers.[353]

According to the Inter-American Development Bank (IDB), only 40 percent of students graduate from the secondary level across the region.[354] Unfortunately, these graduates are often not getting a quality education. In comparison charts with the rest of the world, Latin America education rates often rank near the bottom.[355]

Some high numbers in education statistics can be misleading, since the problem is in the quality of the education, not necessarily in high levels of literacy. The basic definition of literacy defines "literate" as anyone age 15 and over that can read and write. Literacy rates are relatively high in South America, with Brazil at 90.4 percent, Argentina at 97.9 percent, Chile at 98.6 percent, Colombia at 93.6 percent, Ecuador 91.6 percent, Guiana 91.6 percent, Paraguay 93.9 percent, Peru 89.6 percent, and Venezuela 95.5 percent.[356] Peru stands out as having the lowest literacy rates; Chile has the highest.

Public expenditure on education as a percent of Gross Domestic Products (GDP)[357]
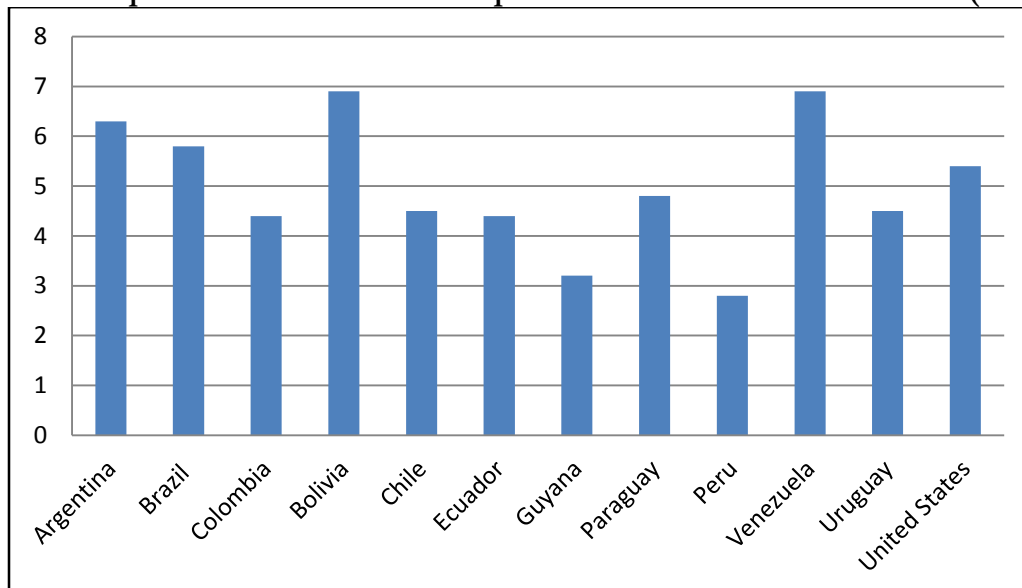
Source: CIA World Factbook, 2014

At the higher education level, opportunities have expanded rapidly in the last 20 years. An increasing proportion of high school graduates enroll for some type of higher education.[358] The so-called "lost decades" of Latin America (from the 1980s to the end of century) resulted in a long period of economic contraction that damaged the quality and the equity of education. In spite of significant changes that have occurred, the region still shows low indicators of educational development compared to those of the industrialized countries. Grave imbalances persist, such as the concentration of enrollments in a few countries, and in specific fields of knowledge, the unequal distribution of researchers, and the uncontrolled advance of the private sector.[359]

School enrollment, tertiary (% gross)
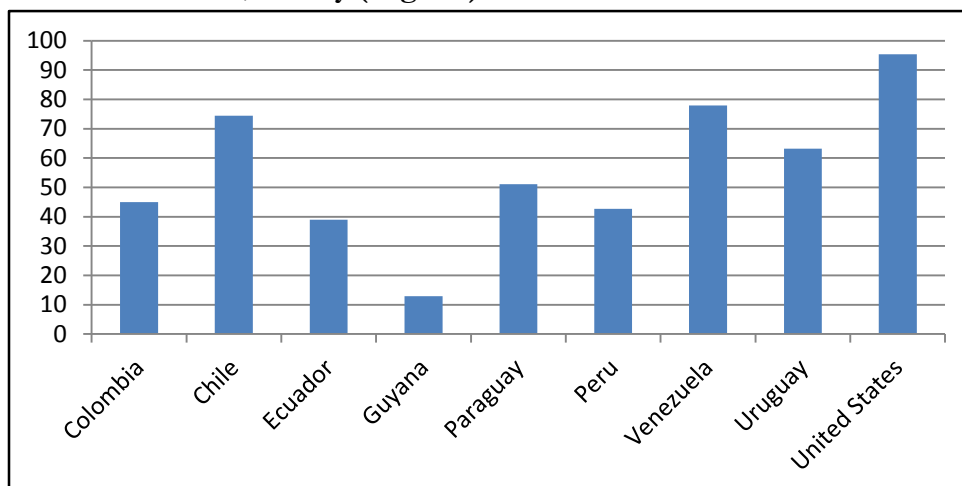
Higher education reflects the large inequalities and iniquities of gender, race, ethnicity, and particularly of socio-economic conditions existing in the population.[360]

Source: World Bank Data - 2014

Healthcare

While healthcare services vary throughout South America, most medical services and hospitals are adequate in urban areas, but are often lacking in rural areas. Most countries have both a public system, usually financed through taxes, and a private system that is financed by private insurance policies.

Most countries in South America have adopted universal healthcare coverage in recent years.[361] According to the World Bank, significant healthcare access has been achieved over the past decade.[362] For instance, *Plan Nacer* in Argentina has been credited with helping to introduce changes within the health system, granting access to basic health insurance to more than one million previously uninsured people. Chile offers nearly universal health care to its 17 million inhabitants, and Colombia offers subsidized national health insurance, guaranteed by its 1991 constitution. In Peru, despite efforts to expand health coverage, inequity remains in rural areas and among indigenous populations. The Comprehensive Insurance Program has helped reduce maternal and child mortality by eliminating fees for many basic healthcare services.

Health expenditure, private (% of GDP)
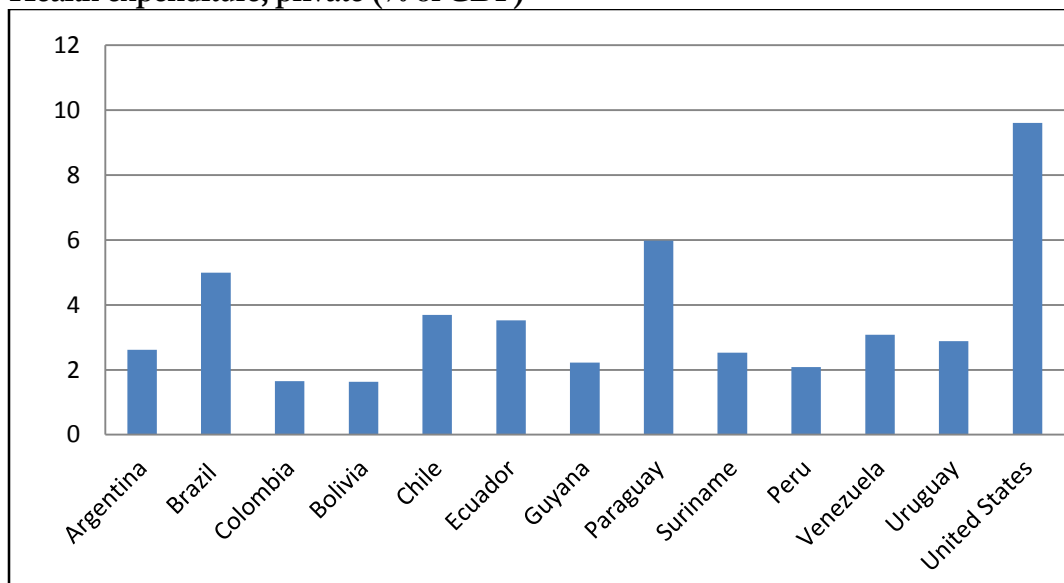
Source: World Bank Data - 2014

Total expenditure on health as a percentage of GDP[363]
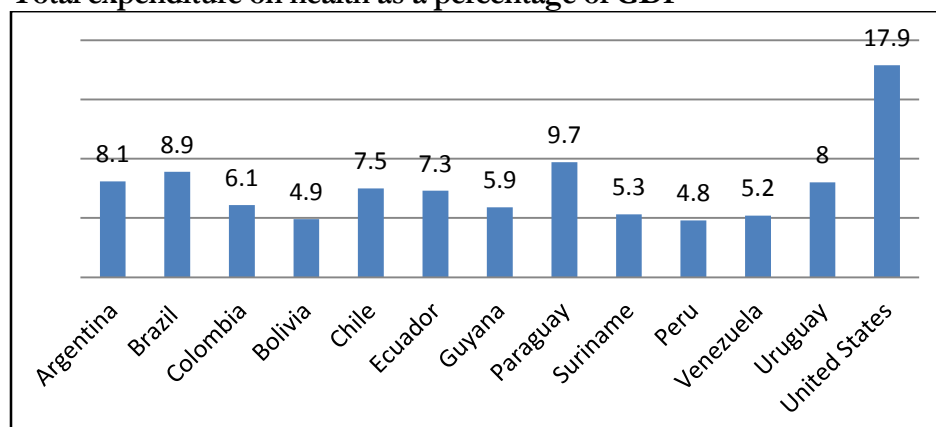
Hospital beds (per 1,000 people):
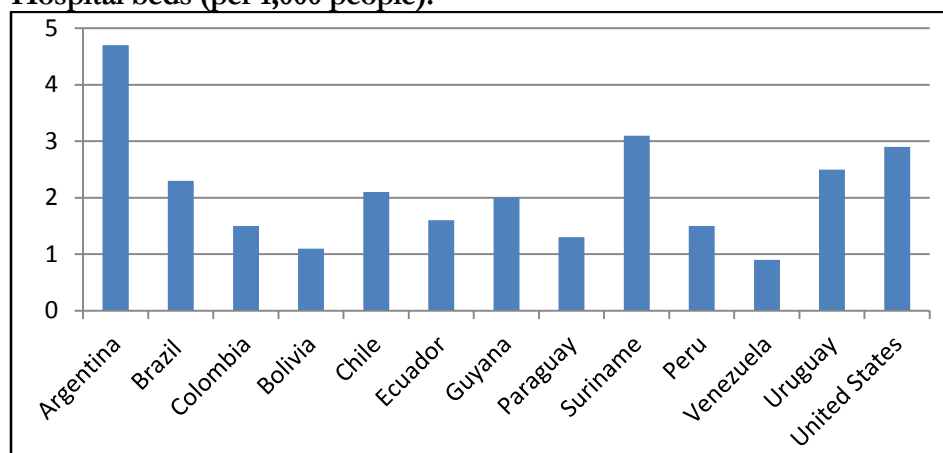
Physicians (per 1,000 people)
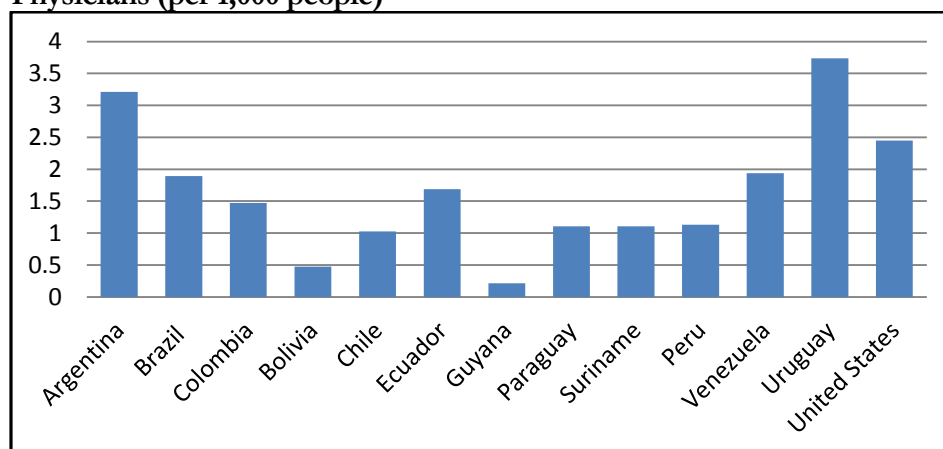
Economic Overview

Why Economics and Infrastructure Matters to You as a Marine

The goods and services that people exchange, the infrastructure that people use to move them, and the formal and informal structures that make exchange possible all play critical roles in survival. A thorough understanding of a region is impossible without knowledge of its economy because the region's political, social, and cultural trends reflect and shape economic development.

Economic trends in South America (1980-1990s)

During this period, the rapid increase in unemployment, combined with government cuts in social spending, had a major impact on the poor. Unemployment reached unprecedented proportions across the region, while government spending on health and education, food subsidies, and transportation was slashed. While most of South America transitioned back to democracy in the 1980s, the region faced the threat of economic collapse. This so-called "lost decade" was marked by several countries defaulting on international loans, and the destructive effects of hyper-inflation.[364]

Recommended Reading:

For understanding the effects of hyperinflation on society:

Javier Gonzalo Alcalde, *Development, Decay and Social Conflict – An International and Peruvian Perspective*, Miller Center Series on a World in Change, Vol. II

Inflation - A persistent, substantial rise in the general level of prices related to an increase in the volume of money and resulting in the loss of currency value.[365]
Hyper-inflation - Also called "galloping inflation" is an extremely high inflation, usually over 50% per month, often involving social disorder.[366]

According to economists, hyperinflations in South America have been preceded by years of chronic high inflation.[367] For example, in Argentina, Brazil, and Peru, year-over-year inflation remained consistently above 40 % for 12–15 years before the peak of the hyper-inflation.[368]

In Brazil, the source of this inflation was the expansion of the money supply. The government financed its operation and its development projects by simply creating money.[369] Although the price levels in the late 1990s were astronomical compared to 1980s, the rates of inflation in those years were not the extreme cases, as shown in the graph below. The graph denotes hyper-inflation in the region. (Note Colombia's low inflation compared to Brazil's and Peru's):[370]

Inflation, Consumer Prices (annual percentages)
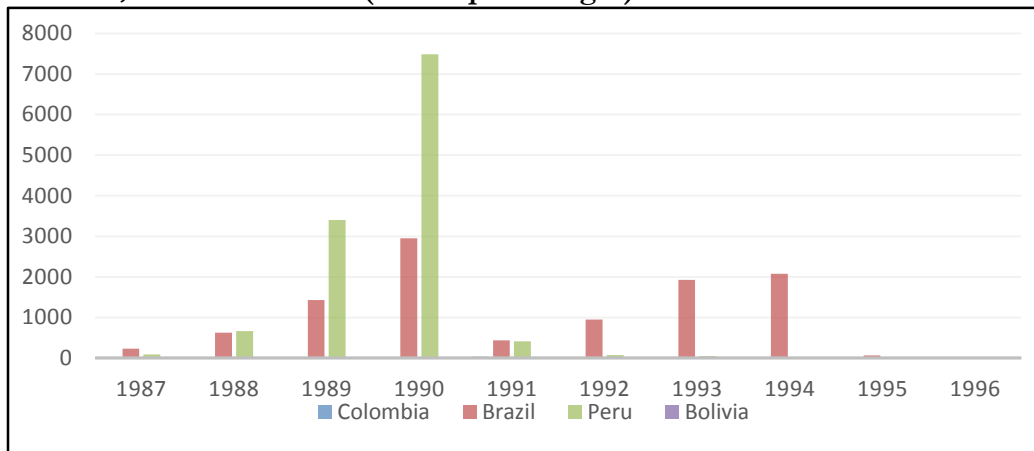
Source: World Bank Data – 2014

According to economists, an interesting thing that occurred during the hyper-inflation period is that the real gross domestic product (GDP) did not decline, but was more or less stagnant and good, barely keeping up with population growth.[371] Once the hyper-inflation was controlled, the economy began to achieve real growth and moderate increase in per capita real GDP. See graph below:

GDP Growth (annual percentages)
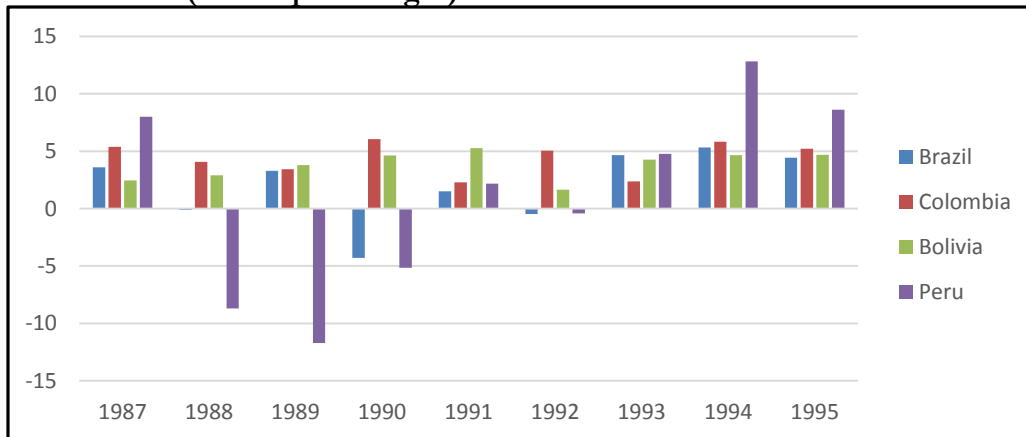
Source: World Bank Data – 2014

Economic trends in South America (1990s-2000s)

In the 1990s, in an effort to save their rapidly deteriorating economies, several countries decided to adopt harsh economic policies mandated by international finance organizations, such as the World Bank and International Monetary Fund (IMF). These efforts were "mandated" in the sense that all loans provided by these global economic support organizations were conditional on the affected country adhering to stricter economic policies.[372]

These policies exacerbated persistent social issues across the region, such as poverty and income inequality. The harsh economic polices also led to widespread unhappiness with these international organizations and, by

extension, with the United States.   Washington, DC – and its national leadership -- was the focal point of South American unhappiness because the city is also the home base of the World Bank and the IMF. For many in the region, Washington symbolizes the capitalist system in which these two global financial institutions operate.

Some observers argue that this unhappiness eventually led to the election of several leftist governments (also named "the pink tide" in association with the color red for Communism). Their political agenda emphasized social and economic policies geared towards fixing South America's persistent and pervasive social issues.[373] Some of these leftist governments, such as the ones in Venezuela, Ecuador, and Bolivia, maintain a decidedly anti-U.S. stance, and have challenged the United States on numerous occasions.

Economic trends in South America (2000s – Present)

Many South American countries have had positive growth in the last decade. In Chile, from 2003 through 2013, real growth averaged almost 5% per year, despite the slight contraction in 2009 that resulted from the global financial crisis. Brazil is ranked the eightieth most successful economy in the world, and the largest economy in the region. Brazil's $2.422 trillion GDP outweighs all other South American countries.[374]

GDP – Gross Domestic Product ($ trillions)
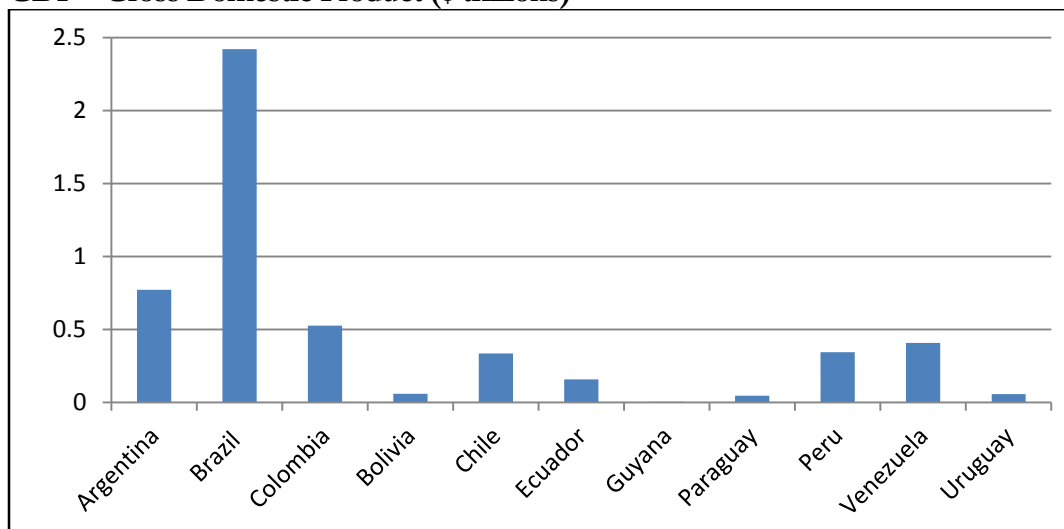
Source: CIA World Factbook - 2014

South American countries are mostly middle income. Bolivia and Paraguay stand out as lower-middle income economies in the region, and the remaining regional countries are classified as upper-middle income economies.[375]

Chile and Uruguay stand out in the region as high-income economies. Despite having many middle-income countries, the region has one of the worst income distribution inequality rates in the world. Brazil's economy is by far the largest in the region, but its GDP per capita is only larger than much smaller economies such as Colombia, Peru, Ecuador, Guyana, Paraguay, and Bolivia. Brazil's GDP is much lower than the GDP of Chile, Argentina, and Uruguay.

South America's countries GDP Per Capita (GDP) – Gross Domestic Product Per Capita compares the GDP on a Purchasing Power Parity (PPP) basis, and means the GDP is divided by population as of 1 July for the same year)
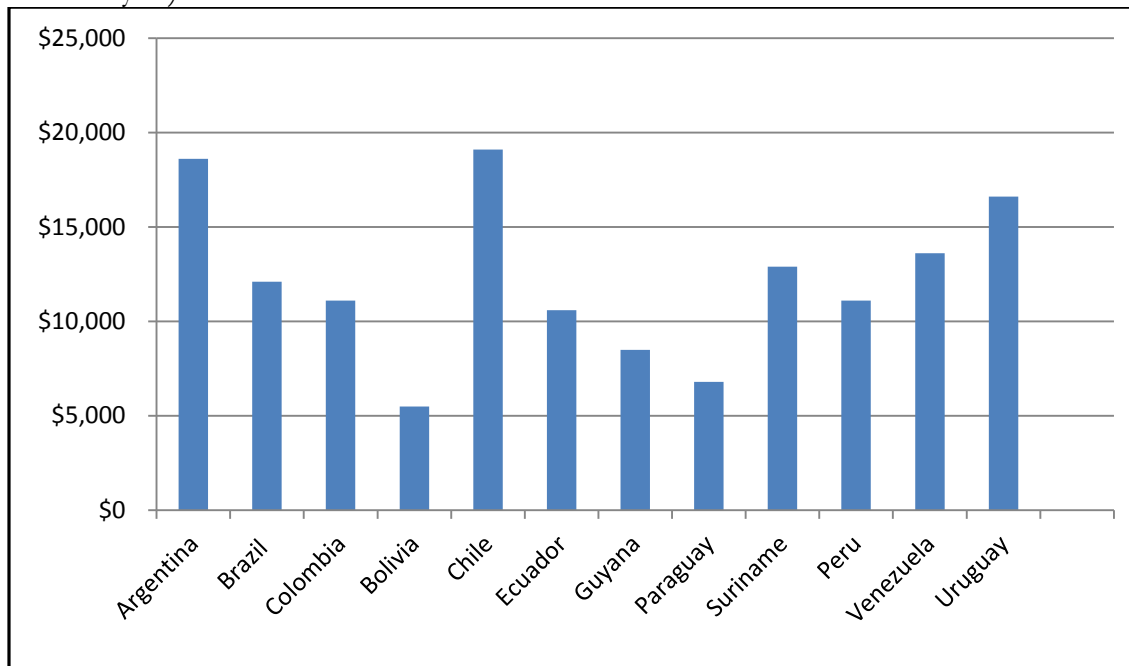
Source: CIA World Factbook - 2014

Purchasing Power Parity (PPP): According to the Organization for Economic Cooperation and Development (OECD), "PPPs are the rates of currency conversion that equalize the purchasing power of different currencies by eliminating the differences in price levels between countries. In their simplest form, PPPs are simply price relatives that show the ratio of the prices in national currencies of the same goods or services in different countries. PPPs are also calculated for product groups, and for each of the various levels of aggregation up to and including GDP."[376]

Income inequality and wealth distribution are two different concepts. Income inequality focuses exclusively on the income side of the equation. Wealth distribution looks at how the ownership of assets in a given society is shared among its members.[377] However, both measures help chart the economic gap within a country's wealthiest and poorest citizens.

Resources

South America possesses a wealth of agricultural and natural resources. Many of its countries are significant producers and exporters of agricultural and mineral commodities.

Minerals and Oil

Brazil exports a range of minerals from iron ore and bauxite to gold and diamonds, while Peru, Colombia, Ecuador, Bolivia, Chile and Venezuela, all mine various minerals and exploit oil and gas.[378] Colombia is the world's fourth largest coal exporter, and is Latin America's fourth largest oil producer.[379] Countries such as Paraguay, Uruguay, and Argentina have limited mineral resources.[380]

Venezuela remains highly dependent on oil revenues, which account for roughly 96% of export earnings, and about 45% of its budgetary revenue.[381] Venezuela is the 10th largest oil exporter in the world, and the fourth largest oil supplier to the United States, behind Canada, Mexico, and Saudi Arabia. Ecuador is also substantially dependent on its petroleum resources, which in recent years have accounted for more than half of the country's export earnings and approximately two-fifths of public sector revenues.[382]

Agriculture

South America has become one of the world's largest supplier of food. While agriculture is not the largest sector in the region's economy (with the services sector being the largest), it is a significant contributor to its GDP.

Agricultural Raw Materials Exports (% of merchandise exports)
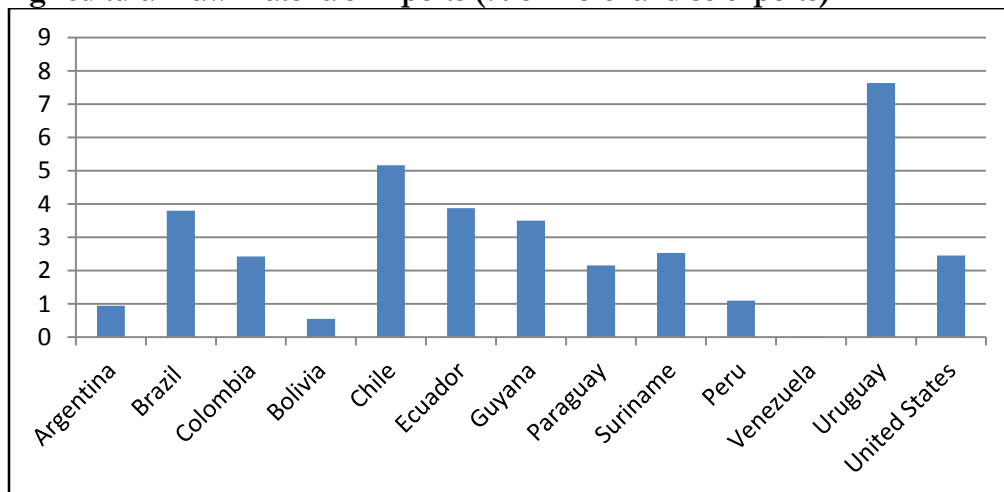
Source: World Bank Data - 2014

In all major countries in South America, agricultural production increased significantly during the past decade, except in Venezuela.[383] This modernization has not eliminated peasant farms and rural poverty, and the future of small commercial farms producing staples like corn, wheat, rice and coffee continues to be bleak.[384]

Fluctuations in the global economy and internal conditions tend to have a direct impact on regional economies. Despite Peru's strong macroeconomic performance, the country's economy is vulnerable because of its dependence on mineral and metal exports, and the import of many foodstuffs.[385]

As South America's largest economy, and with significant land and resources, Brazil has a particularly well-developed agricultural sector.[386]Argentina and Uruguay occupy the extensive, fertile Pampas grassland where farming prospers.[387]

Industry

Agriculture plays an important role in many South American countries, but some economies also have well-developed mining and manufacturing sectors. Mostly due to its large mining sectors, Chile's manufacturing represents 35.4% of its GDP, while Peru' s manufacturing represents 37.5 % of its GDP.[388] Brazil is the largest manufacturing country in the region, and has a diversified industrial base engaged in the manufacture of products ranging from steel to automobiles and aircraft. Brazilian aerospace conglomerate, Embraer, is the world's third largest commercial aircraft manufacturer, and has been increasingly expanding its defense activities into the development of surveillance systems, radar, and other electronics.[389]

Brazil ranks among the world's top ten producers of motor vehicles in the world; the country produced 3,740,418 motor vehicles in 2013, followed by Argentina, with 791,000 motor vehicles during the same period.[390] Argentina also benefits from a diversified industrial base that consists of food processing, motor vehicles, consumer durables, textiles, chemicals and petrochemicals, printing, metallurgy, and steel.[391]

Rank ordering of industries starting with the largest by value of annual output (CIA World Factbook) 2014:[392]
Argentina: food processing, motor vehicles, consumer durables, textiles, chemicals and petrochemicals, printing, metallurgy, steel
Brazil: textiles, shoes, chemicals, cement, lumber, iron ore, tin, steel, aircraft, motor vehicles and parts, other machinery and equipment
Bolivia: mining, smelting, petroleum, food and beverages, tobacco, handicrafts, clothing, jewelry, copper, lithium, other minerals, foodstuffs, fish processing, iron and steel, wood and wood products, transport equipment, cement, textiles
Colombia: textiles, food processing, oil, clothing and footwear, beverages, chemicals, cement; gold, coal, emeralds
Ecuador: petroleum, food processing, textiles, wood products, chemicals
Guyana: bauxite, sugar, rice milling, timber, textiles, gold mining
Paraguay: sugar, cement, textiles, beverages, wood products, steel, base metals, electric power
Peru: mining and refining of minerals; steel, metal fabrication; petroleum extraction and refining, natural gas and natural gas liquefaction; fishing and fish processing, cement, glass, textiles, clothing, food processing, beer, soft drinks, rubber, machinery, electrical machinery, chemicals, furniture
Venezuela: agricultural products, livestock, raw materials, machinery and equipment, transport equipment, construction materials, medical equipment, pharmaceuticals, chemicals, iron and steel products, crude oil and petroleum products
Uruguay: food processing, electrical machinery, transportation equipment, petroleum products, textiles, chemicals, beverages

Regional Trade Groups

Pacific Alliance

The Pacific Alliance is a regional grouping created in 2012 that includes Chile, Colombia, Mexico, and Peru. The goal of the Alliance is to promote regional trade and economic integration aimed at facilitating their integration into a bigger trade pact, the Trans-Pacific Partnership (TPP) with eight other countries.[393] Members of the Pacific Alliance members are engaged with Asian economies: Chile and Peru have signed agreements with China and South Korea; Chile and Mexico with Japan; and Colombia has signed a Free Trade Agreement (FTA) with South Korea, and is also pursuing an FTA with Japan.[394] Full integration of the Alliance with the TPP is unlikely until the initial TPP agreement is reached, which is something that is still being negotiated.[395]

Meanwhile, Peru and Colombia have also signed U.S. FTAs that went into effect in 2009 and 2012 respectively.[396] Since the U.S.-Peru Trade Promotion Agreement went into effect in 2009, the level of trade between Peru and the United States has doubled.[397]

UNASUR

In contrast with the Pacific Alliance, other trade groups of South America have opted for a radically different approach on trade, favoring protectionist measures, with mostly Socialist-inspired countries like Argentina, Brazil, Bolivia, Uruguay, and Venezuela.[398] These South American countries formed the Union of South American Nations (UNASUR), in 2008.[399] Brazil is not currently party to any major multilateral trade initiative, and UNASUR specifically excludes the United States.[400]

Mercosur

The South America Common Market or Mercosur (Spanish) or Mercosul (Portuguese) was created in 1991 by Argentina, Brazil, Paraguay and Uruguay, with the primary purpose of lowering tariffs and creating a common market. Venezuela was recently accepted into the treaty, taking advantage of Paraguay's temporary one-year suspension in 2012 – a legally questionable move following the impeachment of Paraguay's left-wing president, Fernando Lugo. This political move changed Mercosur from an economic pact into a political union, favoring the protectionist views of the current left-of-center leaders, rather on their long-term national interest.[401]

Additionally, the once promising Mercosur has largely withdrawn from pursuing FTAs altogether, and its policies over the past decade have failed to consolidate meaningful partnerships with any of its primary trading partners.[402]

Informal Economy

> **What is informal economy?** According to the World Bank definition, informal economy refers to: "(…) activities and income that is partially or fully outside government regulation, taxation, and observation."[403]

The main attraction of the undeclared economy is an apparent financial advantage. This type of activity allows employers, paid employees, and the self-employed to increase their take-home earnings or reduce their costs by evading taxation and social contributions. Informal employment can provide a cushion for workers who cannot find a job in the formal sector, but it entails a loss in budget revenues by reducing taxes and social security contributions. This lost revenue might otherwise be spent by governments to improve infrastructure and deliver

social services. When governments fail to collect taxes from the informal economy a higher tax burden is usually placed on traditional workers.[404]

A high level of informal labor also can undermine the rule of law and governance. When people openly ignore laws, regulations, and tax rules, they are likely to a have a diminished respect for the state.[405]

The informal economy includes both illegal and legal economic activities. For example, selling drugs is illegal, but taking tips as a waiter in a restaurant is legal activity. However, when waiters fail to report tips as income they become members of the informal economy.
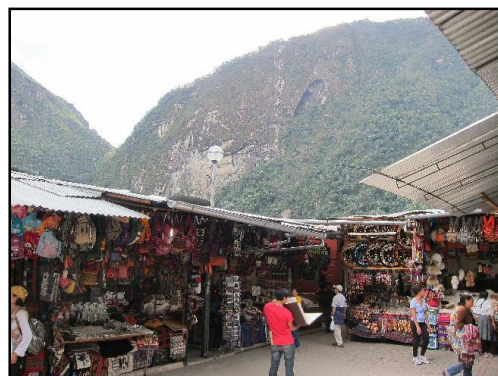
Aguascalientes Market, Peru (Source: CIA World Factbook)

In many countries in South America, due mostly to lack of skills or availability of formal jobs, up to half of the population is underemployed and earns a living by working within the informal economy. These jobs include street vendors selling products such as fruit, candy, clothes, counterfeit merchandize, and pirated film and music CDs. Many workers in the informal economy, particularly in major urban centers, are children who sell products on the street.

Black Market

A subset of the informal economy, the black market is the sector in which smuggled or banned goods are traded; it is an important economic driver in some areas of South America. The tri-border area of South America, located at the convergence of the borders of Brazil, Argentina, and Paraguay, is considered the regional hotspot for the sale of contraband items, illegal weapons, money laundering, counterfeit goods, and illicit substances.

The porous tri-border consists of three main cities: *Puerto Iguazú* in Argentina, *Ciudad Del Este* in Paraguay, with a population of 300,000 people; and *Foz do Iguaçu* in Brazil, with a population of 260,000.[406] Connecting Paraguay and Brazil, the "Friendship Bridge" has a thriving cross-border trade, estimated at $5 billion annually, with much of it "off-the-books"; additionally, this area thrives with money laundering and the sale of contraband and pirated goods.[407] Recent attempts have been made by the three governments with jurisdiction over this area to foster transparency; these efforts was codified with the "Unified Tax Regime" in 2012. However, for now these tax laws only apply to information technology, home electronics, and related goods.[408]

Infrastructure

According to the World Bank, "infrastructure helps determine the success of manufacturing and agricultural activities. Investments in water, sanitation, energy, housing, and transport also improve lives and reduce poverty. New information and communication technologies promote growth, improve the delivery of health and other services, expand the reach of education, and support social and cultural advances."[409] Infrastructure in South America is one of the most significant barriers to development in the region;[410] and improving infrastructure is a priority topic in policy debates.[411]

The Inter-American Development Bank (IDB) is a partner in the Initiative for the Integration of the Regional Infrastructure in South America (IIRSA). This economic initiative is a response based on consensus to the

challenges of effective integration and the growing infrastructure needs in South America, and started in 2000 with a ten-year operative horizon for its first stage.[412] The IIRSA was established to serve as a forum for coordination of intergovernmental actions, with the aim of promoting the development of transportation, energy, and communications infrastructure. The goal of IIRSA is to strengthen the physical integration of the 12 South American member countries, for sustainable territorial development.

Transportation

Although the countries of the Southern Cone have good transportation infrastructure, the topographical features in the rest of South America, such as the Andean Ridge, the vast Amazon basin, and extensive flood plains in low-lying areas, pose difficult challenges to the region's transportation system. Outside of the major cities, much of South America's road, railway, and river transportation networks are underdeveloped.

South America's underdeveloped road, railway, and river transportation systems limit the transportation of vital trade commodities and products. Its ports operate at or near capacity, but port security surveillance is inadequate. Within the cities, traffic is chaotic and congested, and infrastructure issues extend to utilities, with both rural and urban areas having access issues.

Trains in Machu Picchu Pueblo in Peru (Source: CIA World Factbook)

South America Roadways Networks (Roadways comparison of the total length of the road network and includes the length of the paved and unpaved portions)
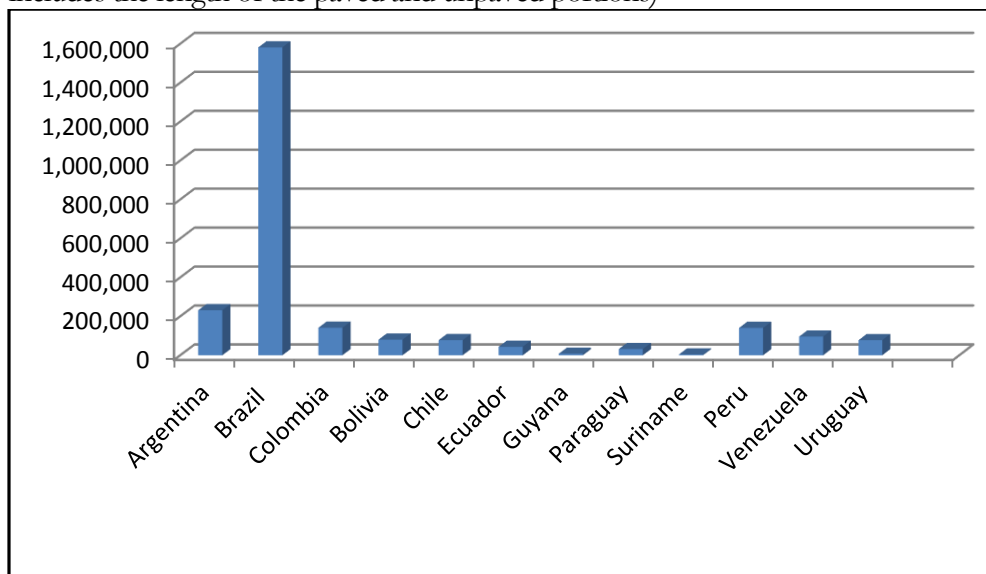
Source: CIA World Factbook – 2014

South American Roads
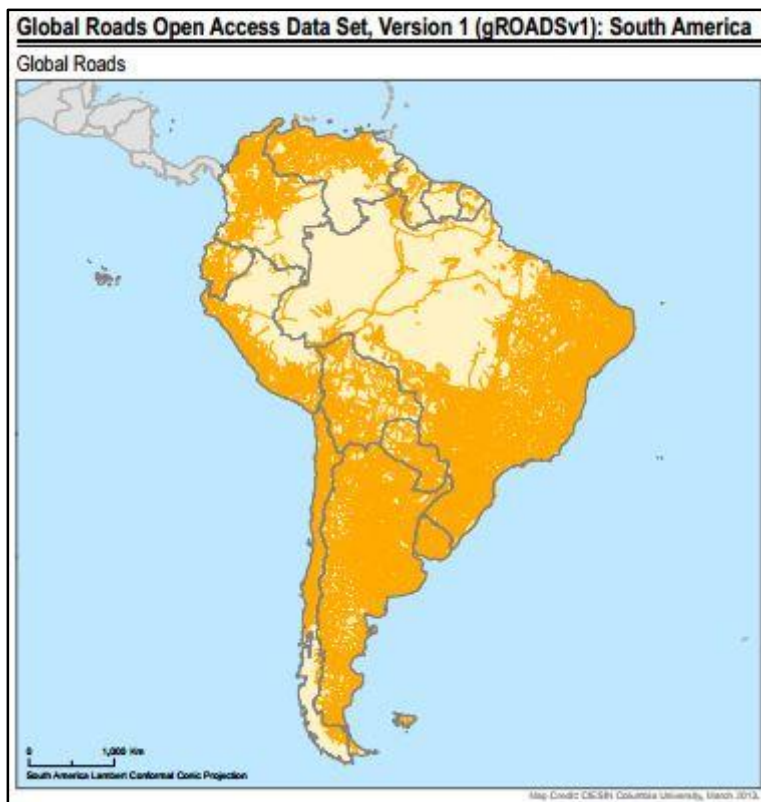
Global Roads Open Access Data Set, Version 1 (gROADSv1): South America

Railways comparison of the total route length of the railway network and of its component parts
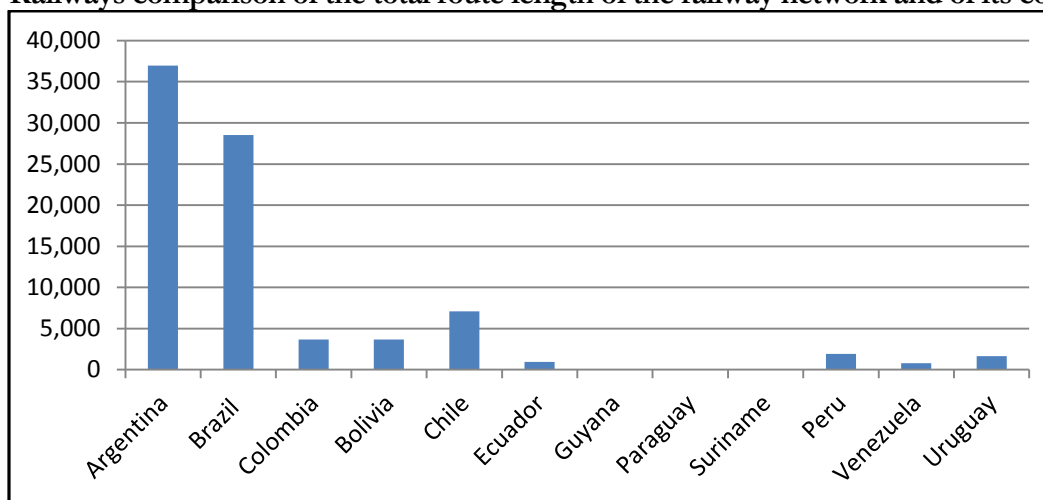
Road conditions differ significantly between countries and sub-regions, but much of South America has a good system of highways. Although often in need of repair, these highways function as major routes for the transportation of goods and passengers, and most major highways are simply paved, two-lane roads. Road

conditions are often unpredictable on long overland routes, and deteriorate in remote areas, poor countries, and sub-regions.

The Andes present a formidable barrier to east-west transportation, and most Andean passes are more than 10,000 feet (3048 meters) high and are blocked by snow for several months of the year. Traveling through the Andes in Ecuador, Peru, and Bolivia can be challenging because many of the passes have only poorly maintained dirt roads.

Traffic

In most large urban areas, traffic is chaotic and congested. Enforcement of traffic laws varies among countries, but is generally less strict than in the United States.

Tip: At night, to avoid robbery, cars do not always stop at red lights.

Fluvial Systems

Sea transportation is a vital component of the transportation systems of South America. Seaports are central to each country's larger economy, which depend on the export of commodities.

Each coastal country has at least one major port, but seaport infrastructure varies greatly throughout the continent. Many ports have undergone extensive renovation and modernization, but others have not kept pace with their countries' growing economies.

Waterways graph compares the total length of navigable rivers, canals, and other inland bodies of water:
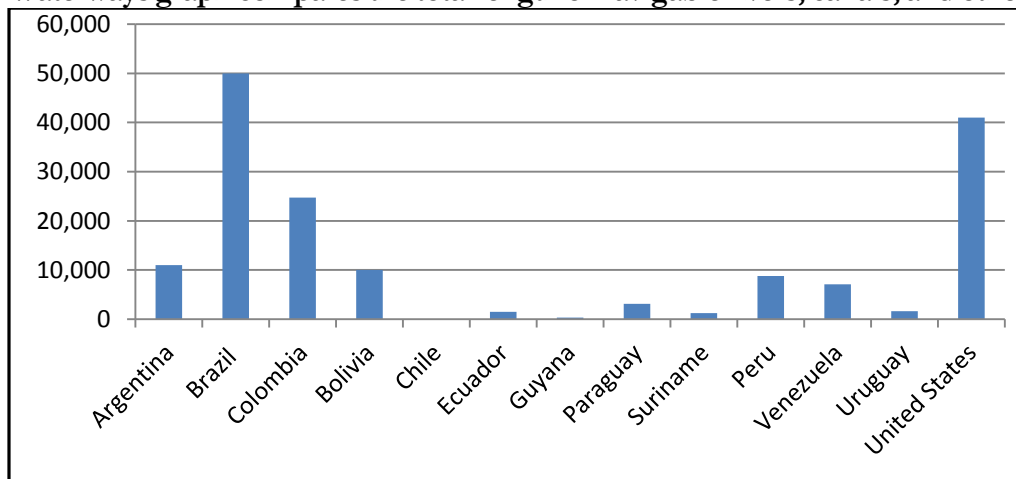
Source: CIA World Factbook 2014

Throughout South America, existing ports and infrastructure operate at or near capacity, and port security surveillance is inadequate, with undertrained and underequipped staff. Robberies are the main threat to maritime security in coastal waters, inland waterways and ports, especially in Brazil, Peru, Venezuela, Ecuador, and Colombia.[413] Most robberies are related to crew valuables, cargo, motors, and other equipment.[414] Brazil, Peru and Venezuela are also a source of concern for piracy, smuggling, and possible terrorist activities.[415]

Riverboats carry both passenger and freight traffic along the many river systems in the Amazon basin and other wetlands throughout the continent. Bolivia and Paraguay, both landlocked, depend upon their rivers as corridors for interior transport.[416]

However, the inland transport network in South America is underdeveloped, and in some cases primitive, causing high freight costs for interior local regions. The movement of goods is impeded by rapids, waterfalls, and lower water levels during the dry season. Overall, the volume of traffic along the continent's waterways is relatively small, and current prospects for improvement are limited.

Air Transportation

Airports and airlines differ in quality and reliability throughout the region. Most South American countries have their own international airlines with domestic and international routes, and at least one international airport.

Air transport is especially important inaccessible regions of the Andes, and in many remote areas of the Amazon basin. In many cases, flights to remote areas will land at very primitive airports that consist of little more than dirt runways located in small clearings in the jungle.

Similar to maritime security, aviation safety is a concern in South America. Although air traffic control is adequate in most parts of the continent, the system, as a whole, needs improvement to meet demands caused by the growth of air travel. Additionally, inadequate radar coverage in remote areas leads to ineffective airspace monitoring.[417]

Airport comparison of the total number of airports or airfields recognizable from the air (the runway(s) may be paved or unpaved):
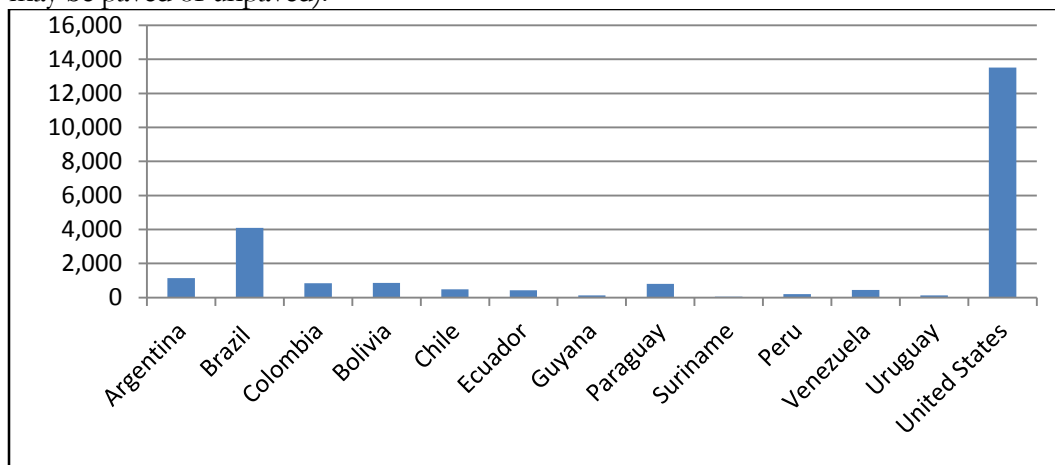
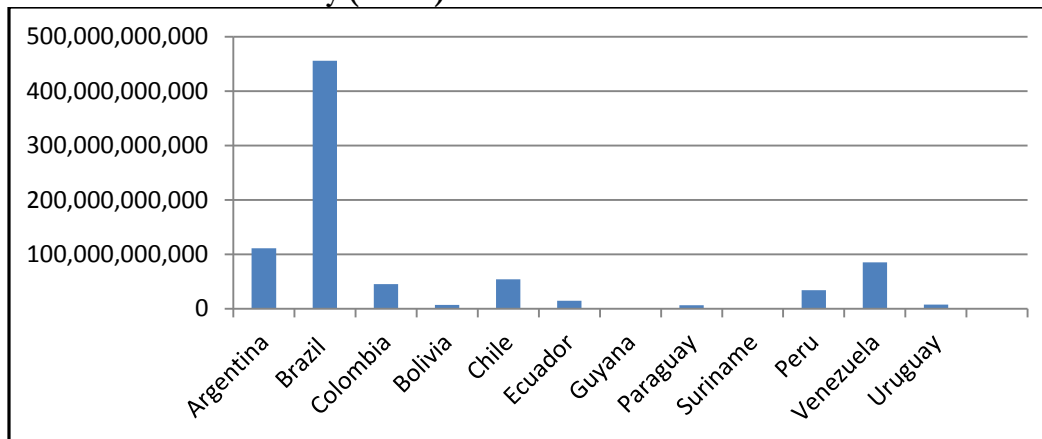Source: CIA World Factbook 2014

Some countries have projects that attempt to minimize the problems caused by lack of surveillance. Brazil stands out in this regard, with its ambitious SIVAM Project (System of Vigilance of the Amazon), a network of surveillance radars and environmental sensors in the Amazon region.[418] SIVAM provides the infrastructure of SIVAM (the Government of Brazil's comprehensive strategy for sustainable development of the amazon region).[419] The goal of SIVAM system is to provide tools to monitor the Amazon region, and to address problems in the Brazilian Amazon such as illegal mining, drug trafficking, forest burning, agrarian conflicts, invasion of indigenous lands, and cattle ranching.[420] In reality, Brazil's experience with SIVAM is considered an example of

extensive cooperation and technology sharing between Brazil and the United States - in this case via the defense giant Raytheon.[421]

Utilities

Due to South America's high rate of urbanization, urban areas have better access to utilities, such as running water, gas, electricity, and sewage systems. The graph below presents the electricity usage in South America, or which countries use the most power in the region.

South America Electricity (KWH):

Source: CIA World Factbook, 2014

Many rural areas are geographically isolated, and tend to lack potable water and sanitation. Expanding populations put pressure on water and sewage treatment facilities, leading to contamination issues. Many cities dispose of unprocessed sewage and other pollutants directly into the environment, creating a great threat to natural habitats and posing health hazards. Several cities in the region have also seen major blackouts due to environmental conditions, especially droughts, and record demand, such as Brazil, Chile, and Argentina.

Communications

In contrast with the rest of the infrastructure sector, the communications sector is developing rapidly, with significant growth in cellular phone usage. While Internet and computer access has increased more slowly than mobile phone use, the region has become one of the most connected to social media websites. Meanwhile, traditional media has been increasingly threatened, impacting people's access to objective information.

Cell Phones

Cellular telephone usage in South America has grown significantly. Brazil cell phone usage is similar to the United States, and has more cell phones than people. Argentina and Colombia also display similar usage patterns proportional to their population.

Telephones - mobile cellular compares the total number of mobile cellular telephone subscribers (Data varies between 2011 and 2013):
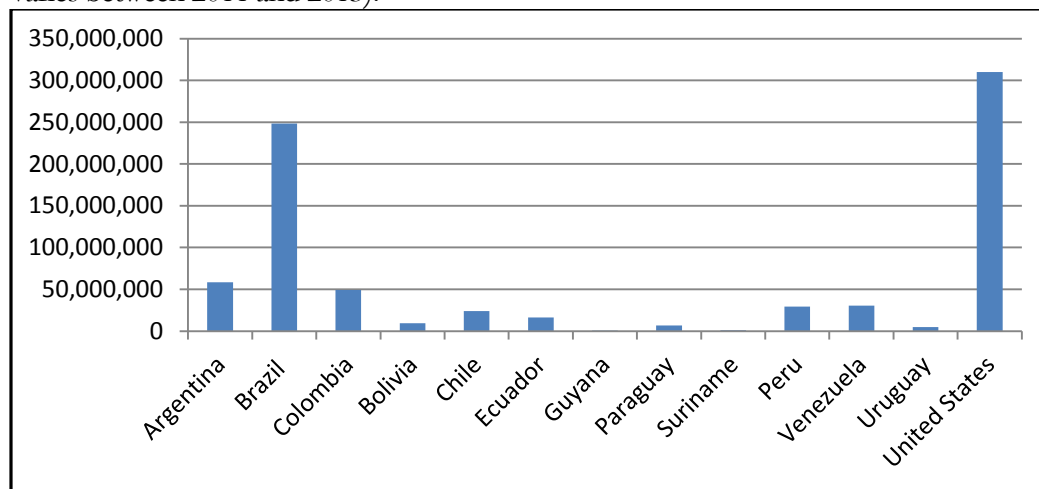
Internet and Social Media

Despite the relatively limited access to the Internet in South America, the region has become strongly connected to social media websites. Facebook strongly leads the social networking market in the region.[422] The growing connection to social media websites has helped users to quickly share information and mobilize people for various causes.

Internet and computer access has grown more slowly than mobile phone use. Cost is one of the main obstacles preventing the wider use of internet services and personal computers. Statistics vary from country to country and may include users who access the Internet at least several times a week to those who access it only once within a period of several months:

Internet users' comparison of the number of users within a country that access the Internet:
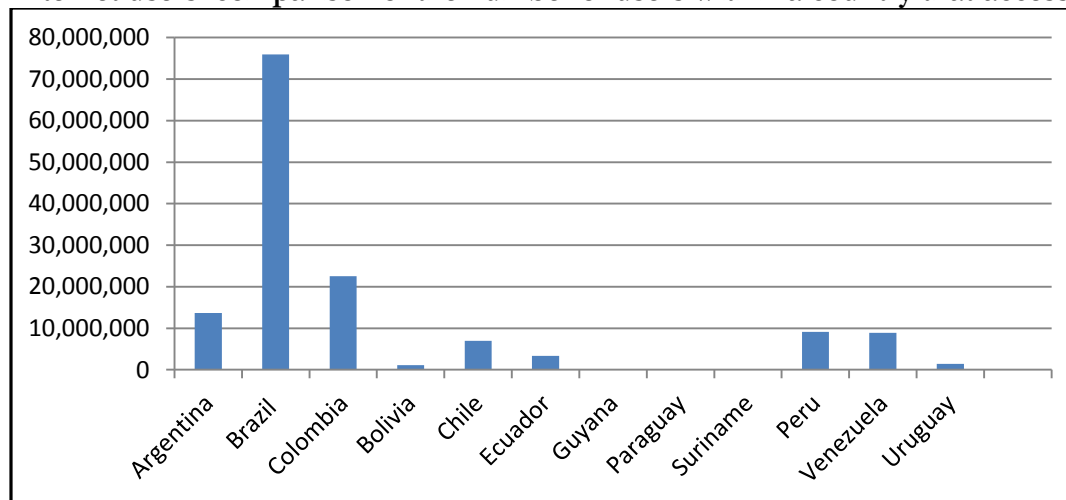
Regional Security Issues

Why Regional Security Issues Matter to You as a Marine

A thorough understanding of a region is difficult without an accurate account of its most significant security challenges. These challenges tend to affect not only relations between states in the region, but also the behavior of its people and the choices they make. Regional security issues encompass a host of topics ranging from wars between states, insurgencies, organized crime, weak institutions, and systemic corruption. Some of these issues involve violence, while others weaken states and societies, and have the potential to turn low-level conflicts into violent confrontations. Therefore, Marines must be aware of the regional security issues in their region. This lesson will provide you with a basic understanding of the key regional security issues facing South America.

Introduction

One of South America's greatest paradoxes is that it is one of the most peaceful regions in the world in terms of cross-border violence, but is one of the most violent in regard to non-state violence. The countries in South America are facing multiple security challenges ranging from organized crime to widespread corruption. The roots of these challenges are partly due to the region's high level of inequality, social exclusion, weak rule of law, and various others problems listed below.[423]

Regional Security Issues:
- The drug problem, homicide and crime, Transnational Criminal Organizations (TCOs)
- *Guerrillas* and terrorist groups
- Territorial and regional disputes
- Citizen insecurity poses a rising challenge to democratic governance and rule of law

The Drug Problem, Homicide and Crime, and TCOs

The top U.S. security concerns in South America are the export of illegal drugs, high crime, widespread corruption, and powerful transnational organized criminal networks that threaten regional stability.

The term "drug problem" refers to any kind of crime related to the illicit production, traffic, distribution, trade, consumption, counterdrug efforts, counterdrug strategies, supply reduction efforts, demand reduction efforts, and any other action connected to the perpetuation of the drug trade or the countering of that trade in the Americas. The relevance of the drug problem for the whole world is immense; it is also one of the main causes of destabilization of the Latin American countries, and the one that will most likely result in regional conflict, especially in Central America, the Caribbean, and the Andean region.

Drug trafficking

South America is a major global producer and supplier of illicit substances, especially cocaine. All cocaine trafficked around the world comes from three Andean countries in South America: Colombia, Peru, and Bolivia.[424] From these three countries, cocaine is trafficked to more than 174 countries around the world.[425] Colombia was the leading regional producer in the past decades, but recent reports show that it has fallen behind Peru and Bolivia. Venezuela is a bridge-point for smuggling through the Caribbean into the United States or to West Africa into Europe.[426]

Drug Use and Production in South America

Cocaine

The United Nations Office on Drugs and Crime (UNODC) *2013 World Drug Report* states that while cocaine use in many South American countries has decreased or remained stable, there has been a substantial increase in Brazil.[427] Additionally, reports show that cocaine use is often perceived to be more prevalent within the more affluent segments of society and the wealthier countries, but for certain forms of cocaine, notably some forms of cocaine base consumed in South America, a typical dose is significantly less expensive than a typical dose of cocaine salt (a powder that can be dissolved and used intravenously or inhaled).[428]

Recommended Reading:

Bruce Bagley, "Drug Trafficking and Organized Crime in the Americas: Major Trends in the Twenty-First Century," *Woodrow Wilson International Center for Scholars* (August 2012). Available at: http://www.wilsoncenter.org/sites/default/files/BB%20Final.pdf

The Criminal Diaspora: The Spread of Transnational Organized Crime and How to Contain its Expansion. Edited by Juan Carlos Garzón and Eric L. Olson. Available at: http://www.wilsoncenter.org/publication/CriminalDiaspora

United Nations Office on Drugs and Crime, 2011 Global Report on Homicide (2011). Available at: http://www.unodc.org/documents/data-and-analysis/statistics/Homicide/Globa_study_on_homicide_2011_web.pdf

Most importantly, the UNODC report reveals that in South America, cocaine seizures clearly exceed cocaine use, highlighting South America's role as a source and transit region.[429] Large quantities of cocaine continue to be smuggled from South America (notably from Colombia) to the United States and Canada, with countries in Central America used as transit countries. However, the market for cocaine in the United States appears to have declined considerably, and both seizures and annual prevalence of cocaine use peaking in 2006.[430]

In 2011, more than half of the cocaine seized in Brazil originated from Bolivia (54%); followed by Peru (38%) and Colombia (7.5%).[431] Brazil's extensive area shares borders with all three major source countries for cocaine. It has a large population, a significant number of users of both cocaine salt and crack cocaine, and a long coastline that offers easy access to the Atlantic Ocean for onward trafficking to Africa and
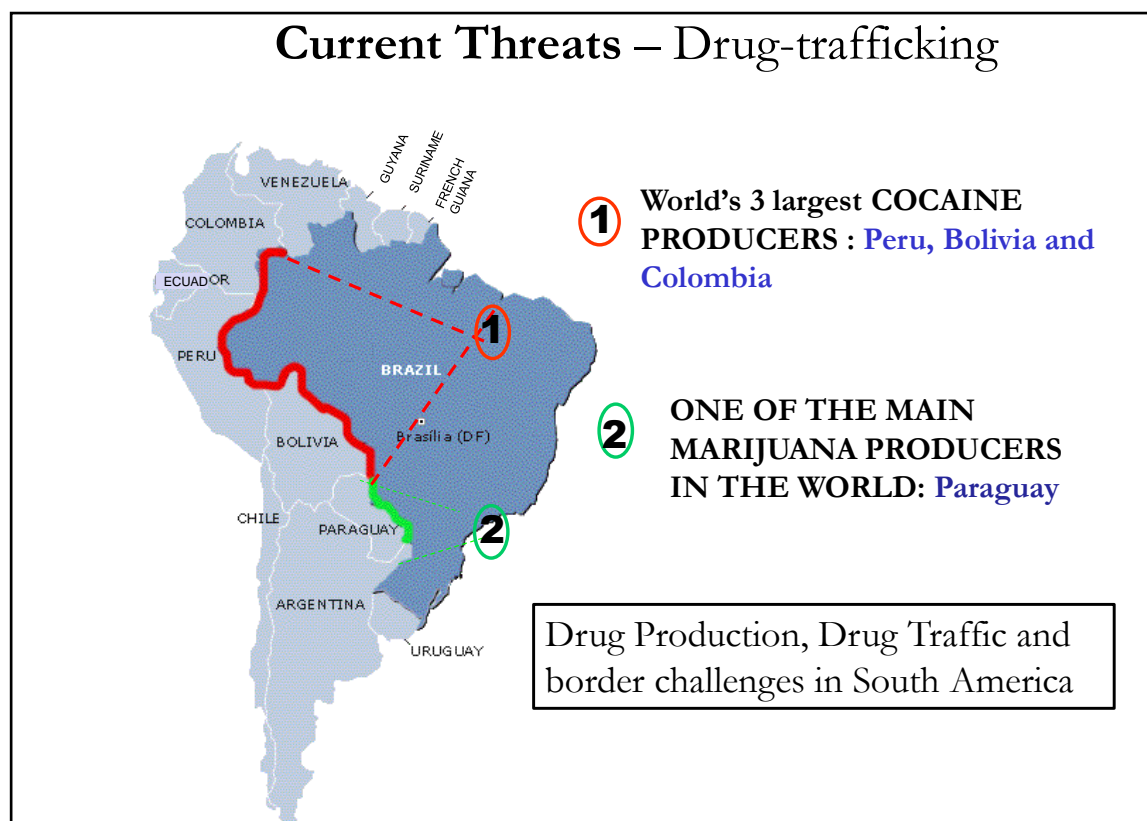
Europe. Due to these factors, the UNODC study concludes that Brazil plays an important role in the global cocaine market as both a destination and a transit country.[432]

Current Threats – Drug-trafficking

1 World's 3 largest **COCAINE PRODUCERS** : Peru, Bolivia and Colombia

2 **ONE OF THE MAIN MARIJUANA PRODUCERS IN THE WORLD:** Paraguay

Drug Production, Drug Traffic and border challenges in South America

Additionally, Brazil is also a point of transit for cocaine consignments trafficked to West and Central Africa and Europe, notably the Iberian Peninsula.[433] It appears that the linguistic and cultural ties with Portugal and Lusophone countries in Africa play a role in this phenomenon, as Brazil is most frequently cited as a country of provenance among individual cocaine consignments seized by Portugal.[434]

Coca/cocaine cultivation, production and eradication

Global illicit cultivation of coca bush, 2002-2011 (Hectares)										
	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Bolivia (Plurinational State of)	21,600	23,600	27,700	25,400	27,500	28,900	30,500	30,900	31,000	27,200
Colombia [a]	102,000	86,000	80,000	86,000	78,000	99,000	81,000	73,000	62,000	64,000
Peru [b]										62,500
Peru [c]	46,700	44,200	50,300	48,200	51,400	53,700	56,100	59,900	61,200	64,400
Total	170,300	153,800	158,000	159,600	156,900	181,600	167,600	163,800	154,200	155,600 [d]

Source: For Bolivia (Plurinational State of), 2002: CICAD and United States Department of State, International Narcotics Control Strategy Report; since 2003: national illicit crop monitoring system supported by UNODC. For Colombia and Peru: national illicit crop monitoring system supported by UNODC.

Source: UNODC 2013 World Drug Report

Cannabis herb is increasing cultivation in the main markets

The UNODC also reports that in South America most countries observed an increase in cannabis herb seizures, with Bolivia, Colombia, and Paraguay reporting an increase of more than 100% when comparing the period 2002-2006 with the period 2007-2011.[435] However, the report cautions that it is not clear whether this surge is the result of increased levels of production or increased law enforcement efforts.[436]

Countering Transnational Organized Crime in the Region

The U.S. military works with federal agencies and partners in the region to counter illicit trafficking networks. Accordingly, the United States Southern Command (USSOUTHCOM) supports the *2011 White House Strategy to Combat Transnational Organized Crime*.[437] The current USSOUTHCOM priority is drug interdiction, detection, and monitoring in Central America and the Caribbean. But in South America, the Command's efforts are directed by this policy:

> "USSOUTHCOM's ongoing strategic partnership with Colombia -- undertaken within the framework of the Colombian Strategic Development Initiative (CSDI) originally developed by the U.S. Embassy in Bogota -- serves as a model for integrated collaboration. CSDI aligns the U.S. government support to Colombia with the Colombian government's National Consolidation Plan, a whole-of-government effort to expand state presence and services in targeted areas where poverty, violence, illicit crop cultivation, and drug trafficking have historically converged."[438]

Challenges to the U.S. led "War on Drugs"

The U.S. has historically led the international counter-trafficking forums, pushing for drug policies to be primarily focused on drug enforcement, and named it "War on Drugs." However, despite decades of anti-drug efforts by the U.S. and partner governments, and billions of dollars spent by all parties involved, the war on drugs efforts has created the so-called "balloon effect," in which efforts to eradicate drugs in one place simply shifts it to another. For example, blocking the maritime routes for Colombian drugs prompted the creation of powerful Mexican drug cartels and their routes into the United States.

The balloon effect can also be observed in the shift of coca cultivation from Bolivia and Peru to Colombia in the 1990s, and its move back into Peru and Bolivia, from Colombia, after the efforts of Plan Colombia in the 2000s.[439] Today, the Andean Ridge countries in Latin America, especially Bolivia, Peru and Colombia, continue to be the focal point of global coca cultivation and cocaine production, despite billions spent in eradication efforts.

As a result, there is a growing "anti-prohibitionist and anti-drug war" movement in Latin America with an agenda that aims to change drug enforcement regulations. Uruguay is leading the way on the anti-

prohibitionist side. It was the first country in the world to regulate the production, sale, and distribution of marijuana, and to provide a model for countries looking for alternatives to the world's dominant drug policy paradigm.[440] Despite the strong advocacy of Uruguay's former President Jose Mujica for legalization of marijuana on December 2013, polls indicated that nearly two-thirds of Uruguayans opposed it.[441] The legalization movement's main arguments can be summarized as following:

> "The foundations of the U.S.-led war on drugs -- eradication of production, interdiction of traffic, and criminalization of consumption -- have not succeeded and never will. When there is established demand for a consumer product, there will be a supply. The only beneficiaries of prohibition are the drug cartels."[442]

The reality is that the internal instability generated by the drug problem varies in severity from country to country. Virtually every country in the region experiences a different level or stage of the negative effects of drug production, trafficking, violent crimes, strain on law enforcement capacity and security forces, and popular pressure for change. These negative effects have fueled, in some countries, popular support for the anti-prohibitionist and anti-drug war movement. It is important to note that public opinion is not unified, and legalization proponents in Latin America face intense opposition internally.

Another important characteristic of organized crime is that it is highly adaptive. If confronted, it will simply move to other businesses that are equally profitable and violent.[443] Indeed, along with the balloon effect, this adaptability of the criminal networks dealing with narco-trafficking is also well documented in the hemisphere.[444] For example, as drug trafficking is combatted or legalized, one possible outcome is the displacement of the problem to other industries across the region, as criminal gangs diversify their activities to offset lost income. Criminals might take up activities such as criminal mining, illegal logging, oil theft, human trafficking, and money laundering.[445] Gold mining is a particularly vulnerable industry, especially in Colombia, where armed groups such as the guerrilla group the Revolutionary Armed Forces of Colombia (FARC), and other criminal gangs such as the *Urabeños* and the *Rastrojos* (collectively referred to by the Colombian government as "*bandas criminales*" or BACRIM) are already believed to either be collecting extortion fees from or have direct control over gold mines in a third of municipalities.[446] It is also a known fact that the FARC's income from illegal gold mining has exceeds income from coca production in eight of Colombia's thirty-two provinces.[447]

Homicide and Crime

According to the UNODC, the significantly higher homicide rates in the Americas (compared to other global regions) is not a new phenomenon. In fact, the Americas have consistently experienced homicide levels five to eight times higher than those in Europe or Asia since 1955.[448]

The UNODC report on homicide states that intentional homicide and violent crime represent a threat to civilian security, with increasing evidence that this lack of security is largely due to weak criminal justice systems.[449] The report stresses that overall, organized crime and gang-related homicide accounts for 30 % of homicides in the Americas, and that the level of impunity for homicide in the Americas is rather high.[450] This high level of impunity denotes the weakness of its judicial system and the rule of law.
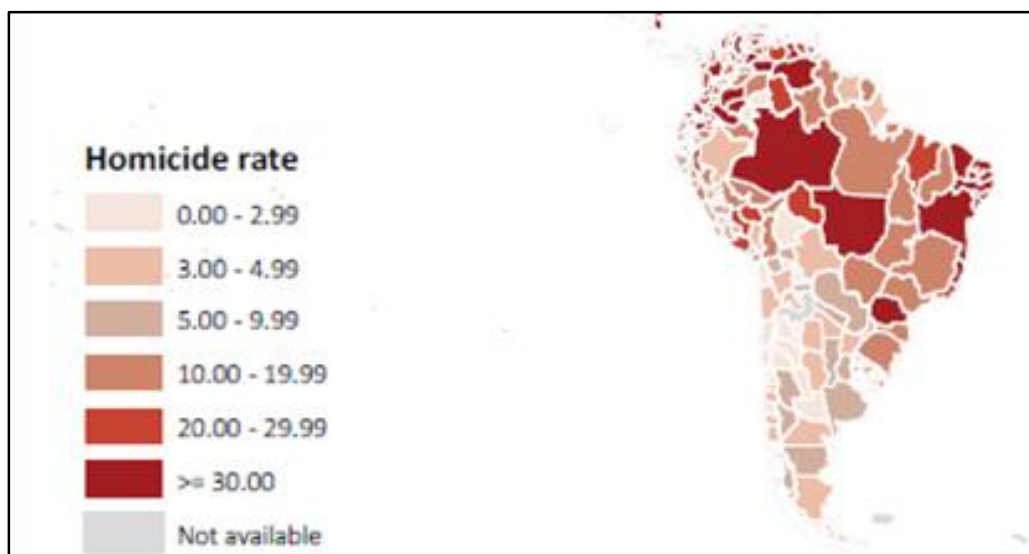
Homicide Rates by Country or Territory
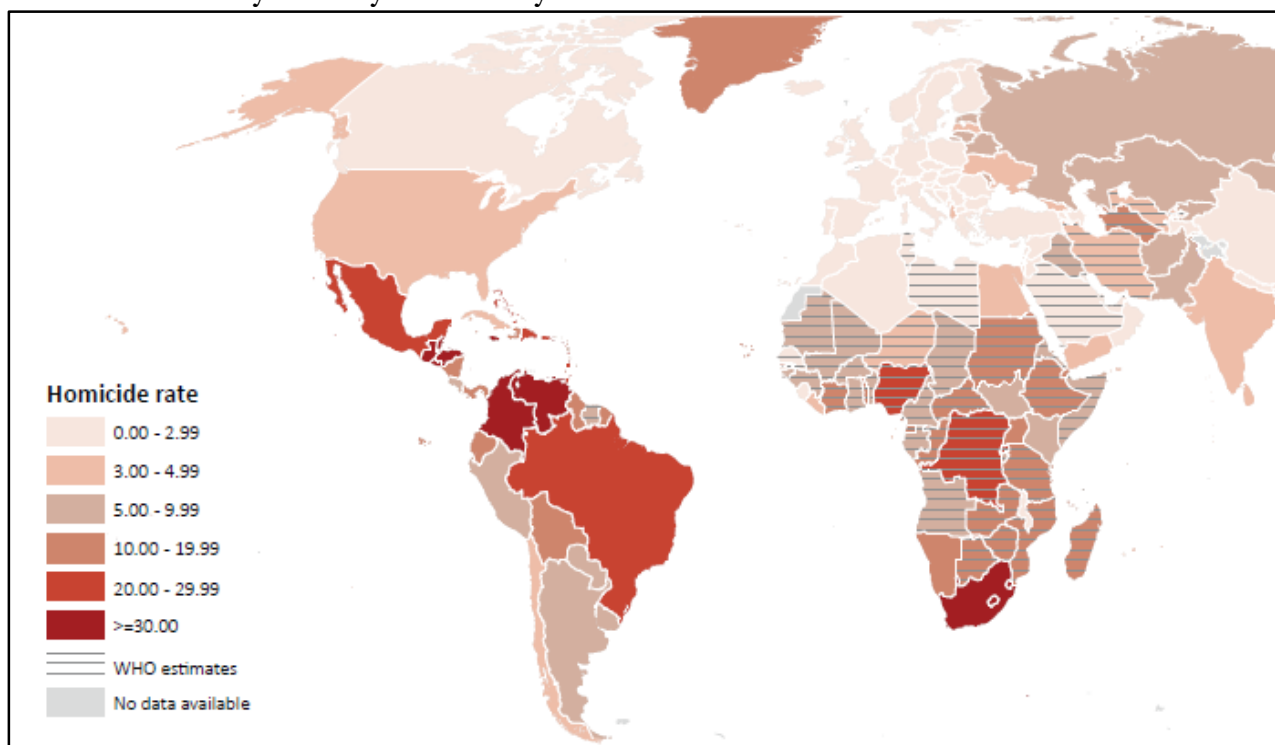
Source: UNODC Homicide Statistics 2013

Homicide rates, selected countries in 2012 or latest year (per 100,000 people)
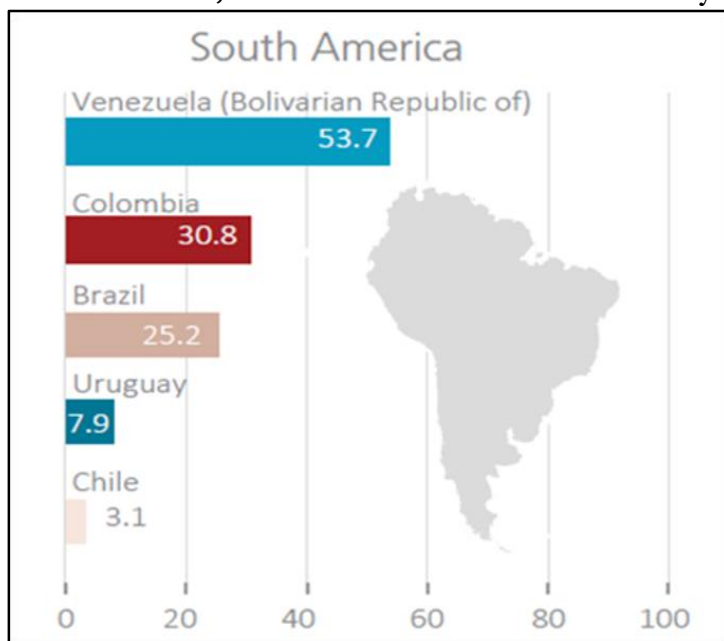
Source: UNODC Homicide Statistics 2013

Homicide rates at the sub-national level, 2012 or latest year (per 100,000 population) (Source: UNODC Homicide Statistics 2013)

According to the UNODC, South America has had the same homicide rate since 1995, despite very different trends at the country level.[451] For example, Colombia's homicide rate has been decreasing since 1996 but remains at a very high level, while Venezuela is the only country in South America that has had a consistent increase in homicide rates since 1995. Brazil's homicide rate is quite stable and high, while homicide rates in Argentina, and Chile, and Uruguay are stable and lower.[452]

Kidnapping in Venezuela - According to *Insightcrime*, Venezuela is considered the main kidnapping "capital" of South America, especially since 2000.[453] The government estimates that 1,150 people were kidnapped in 2011, but these figures do not reflect reality, since law enforcement agencies acknowledge that 80% of kidnappings are unreported. Police corruption, a factor in some kidnappings, was so pervasive in Caracas that the entire force was disbanded in 2011.

The UNODC study reveals that ratio of homicides perpetrated by organized criminals compared to other murders is proportionately larger in the Americas. This violence is often linked to competition between organized criminal groups (or between these groups and the state) for control over territory or illicit activities, including trafficking.[454] Additionally, there is an extreme gender bias towards male victims in homicides related to organized criminal groups.[455] For example, 96% of the victims of this type of homicide are male in the Americas.[456]

The report has noted so-called homicide "hot spots," which can sometimes remain hidden in the overall national rate of homicide in a given country. These hot spots are often associated with other risk factors like unemployment, poor standards of education, the presence of youth gangs, accessibility to firearms, and organized crime, poverty, and inequality.[457]

The UNODC report paid special attention to Brazil in relation to crime hot-spots. It said that although the national homicide rate in Brazil has changed little over the last 30 years, there have been significant changes within its different states. Homicide rates have declined in the states (and cities) of Rio de Janeiro and São

Paulo, but they have risen in other parts of the country, particularly the north and northeast.[458] As homicides in Rio de Janeiro and São Paulo States decreased (by 29% and 11%, respectively, from 2007 to 2011), the homicide rate increased by almost 150% in the State of Paraíba and by half in Bahia.[459]

Homicide rate percentage change at sub-national level – Brazil (2007-2011)
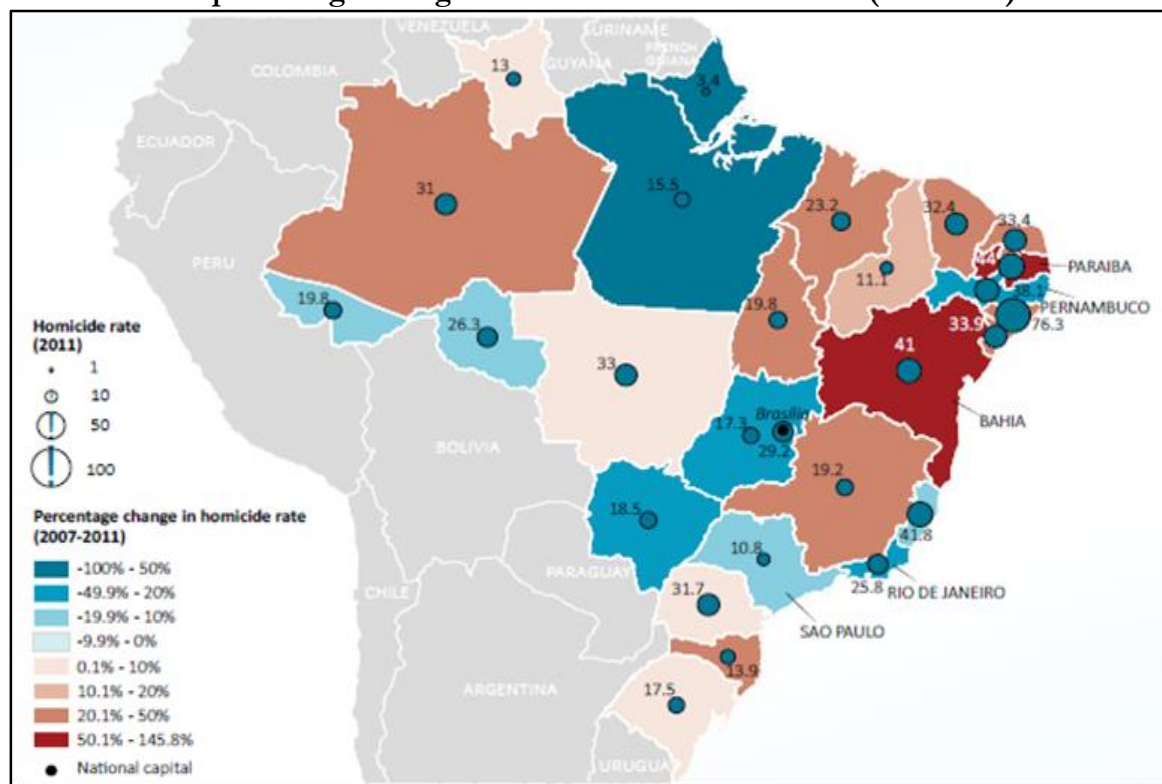
Source: Ministry of Justice, Brazil - 2012

Main Criminal Organizations in South America

Criminal organizations in the region are changing their "business model" to legal activities, and expanding operations throughout South America, interconnecting with other powerful criminal organizations. As they expand, they also fragment and assimilate local gangs that pose new risks of increased violence to establish control of new territories.

Recommended Reading:

For information regarding **current criminal groups** in, access the Country Profile page of the criminal database of the Americas at *Insightcrime* which provide updates on these groups, explains how they came to be and what kind of threats they pose. Available at: http://www.insightcrime.com/organized-crime-profile/brazil#Security

South America's Principal Criminal Groups

Brazil[460] **-** Brazilian criminal groups are becoming increasingly involved in the international drug trade, extortion, and kidnapping rings. The largest criminal groups, Red Command (*Commando Vermelho*), First Capital Command (*Primeiro Comando da Capital – PCC*), and Third Command (*Terceiro Comando*), were founded in the overcrowded Brazilian prisons. Their leaders are able to run drug trafficking, kidnapping, and extortion schemes from inside, even conducting massively coordinated attacks that murdered several dozen police officers in São Paulo in 2012. Other important groups: Friends of Friends (*Amigos dos Amigos*) and several dangerous militias. According to 2013 estimates, the Red Command ships one ton of Colombian cocaine to Brazil each month from Paraguay, which has become a cocaine trafficking hub for Brazilian gangs.[461]

Colombia[462] **-** According to *Insightcrime,* despite the government's advances in security over the last decade, at least a half dozen major criminal groups still operate in Colombia, focusing on drug production, trafficking and distribution on a local level, laundering money, kidnapping and conducting extortion. Recent demobilization of thousands of right-wing paramilitaries and left-wing guerrillas have further complicated the matter, since they have been recruited as experienced fighters, raising violence in many areas, particularly in urban settings where they seek to push the consumption of more drugs. Working together or fighting against each other for control, these groups include the FARC and National Liberation Army (ELN) rebel groups, and criminal groups known as the *Rastrojos*, *ERPAC*, the *Paisas,* the *Oficina de Envigado*, and the *Urabeños.*

Peru - The *Sendero Luminoso* (The Shining Path) continues to be the main source of criminal activity in Peru. As drug production in Colombia decreased and drug traffickers were pushed out of the country, Peru replaced Colombia as the largest cocaine producer in the world. It also emerged as an important transshipment point to large markets, including Brazil and the U.S.[463] Continuity depends on the success of the government's ambitious eradication schemes, and its ability to combat the Shining Path rebels in their remote hideouts.[464] This remote and rugged region is known as the Apurimac, Ene, and Mantaro River Valley (VRAEM), and it borders provinces such as the Huanta and la Convención. Due to the lawlessness in the area, and the lack of formal government control, the military has declared it an emergency zone. Besides being the principal hideout for the Shining Path, it also accounts for over half of the cocaine produced in Peru.[465]

Venezuela[466] **-** According to *Insightcrime*, Venezuela has been the site of activity by criminal organizations from Colombia, Brazil, and Europe. Because Venezuela is a transit country, many of the criminal organizations that have traditionally profited from Venezuela's drug trade are the Colombian rebel groups such as the FARC and ELN that use border provinces such as Apure, Tachira, and Zulia as refuges. Venezuela also has homegrown organizations, such as the corrupt officials, known unofficially as the Cartel of the Suns, and the guerrilla group the Bolivarian Liberation Forces (FBL).

Guerrillas and Terrorist Groups

The FARC - Colombia

One of the biggest irregular armies in Colombia, and the oldest and most important guerrilla group in the Western Hemisphere, the FARC still operates in 25 of Colombia's 32 provinces.[467] Additionally, the FARC and the ELN continue to use Venezuelan territory for safe haven and transit of drugs, people, and arms.

For over fifty years the FARC has been involved in a continued and lengthy armed conflict with the Colombian government.

Since the conflict began, 76,430 people have reportedly been killed, and approximately 5 million have been internally displaced.[468] The organization's ties with Venezuela have been especially problematic. Computer files captured from a FARC commander killed in a 2008 raid showed direct links between Venezuelan officials and the guerillas.[469]

There is a debate whether the FARC's structure and modus operandi constitute one of a drug cartel, a criminal organization, a radical political organization - or all three.[470] Politically, the FARC is connected to the Communist Party of Colombia, and despite their rising participation in kidnapping, extortion, and many criminal activities, the organization utilizes these means to achieve its political objectives. Therefore FARC can be categorized as an organization with political ends.[471]

Despite the concerted effort by the Colombian government and $8 billion in U.S. assistance through Plan Colombia, the FARC still has some 8,000 guerrillas in its ranks, and still represents a security concern.[472] According to 2007 independent conflict monitors, the FARC has been launching attacks in a progressive manner, and in 2011 surpassed its previous high point of 2002.[473] Having been driven from the territories that they once controlled, the FARC seems to have changed tactics and is increasingly focused on classic guerrilla tactics such as hit-and-run style assaults and ambushes.[474]

In 2010, shortly after taking office, Colombian President Juan Manuel started informal discussions with the FARC. These initial talks led to direct talks with the rebels' representatives in February 2012, and are currently under way in Havana, Cuba.[475] The talks do not include a ceasefire, which is one of the main differences from previous peace processes, but instead are focused on a "solution to the problem of illicit drugs."[476] The formal agenda for the negotiations include crop substitution, participatory rural development, and, more broadly, a "solution to the phenomenon of the production and commercialization of narcotics."[477]

Recommended Reading:

For news on the FARC activities and other terrorist organizations, see *Dialogo – Digital Military Magazine.* Available at: http://dialogo-americas.com/en_GB/search?utf8=%E2%9C%93&by_date=0&q=FARC&x=0&y=0

For information regarding the FARC Peace Talks read:

"Q & A: Colombia Peace Talks," *BBC – News Latin America & Caribbean* (June 13, 2014). Available at: http://www.bbc.com/news/world-latin-america-19875363

Cynthia J. Arnson, "Colombia's Election: A Referendum on the Peace Process," *Latin American Program – The Wilson Center* (June 16, 2014). Available at: http://www.wilsoncenter.org/article/colombia%E2%80%99s-election-referendum-the-peace-process

Terrorist Incidents (2013) – FARC and ELN

As of 2012, the FARC has focused on low-cost, high-impact asymmetric attacks. The most common forms of terrorist activity were the launching of mortars at police stations or the military, explosive devices placed near roads or paths, sniper attacks, roadblocks, and ambushes. Terrorist attacks on infrastructure, particularly on oil pipelines and equipment, primarily by the FARC and the ELN, increased by 46% in 2013 compared to 2012. Security forces and government buildings were the most common targets, although civilian casualties occurred throughout the year. Attacks were most common along the Venezuelan border in the departments of **Arauca, Norte de Santander,** and **La Guajira**, in the southwestern departments of **Nariño** and **Cauca**, and in the northwestern department of **Antioquia.**[478] (*See bolded regions mentioned in the map of Colombia below*)

Sendero Luminoso **(Shining Path) – Peru (Source: CIA)**

The text in the table below was extracted from the *Country Report on Terrorism – Peru* (2013) from the U.S. Department of State Bureau of Counterterrorism.

"According to the Bureau of Counterterrorism 2013 Country Report on Terrorism, the Shining Path (Sendero Luminoso or SL) remains a significant threat to Peru's internal security, although its numbers have shrunk considerably from its peak in the early 1990s when it numbered between 7,500 and 10,000 combatants in its ranks."[479]

By the end of 2013, the SL consisted of a single active faction with an estimated 300 to 500 fighters. Its area of activity and influence was largely confined to the VRAEM region. The SL sustained itself through its involvement in drug production, narcotics trafficking, and extortion of "revolutionary taxes" from others involved in the drug trade. It continued to use Maoist philosophy to justify its illegal activities.

On August 10, an operation conducted by a joint military-police task force in the VRAEM resulted in the deaths of two of the SL's top leaders, Alejandro Borda Casafranca (also known as Comrade Alipio) and Martin Quispe Palomino (also known as Comrade Gabriel). The demise of Alipio and Gabriel was the biggest blow sustained by the SL since the capture of SL's then-national leader, Comrade Feliciano, in 1999.

The organization remains dangerous, and could reunite again after sustaining hard blows. The joint operation that claimed the lives of Alipio and Gabriel was conducted in accordance with a new Peruvian government strategy that emphasizes intelligence and unity of command in combatting the SL. The successful operation also demonstrated the increasing ability of security forces to plan and execute complex missions and the willingness of military and police forces to work together. The government's new strategy, announced by President Humala in July, also stresses gaining control of territory in the VRAEM at the lowest cost, in human lives. Three soldiers were killed in the VRAEM in 2013; a significant reduction from the 19 members of the security forces who lost their lives in armed confrontations with the SL in 2012. There was some evidence to suggest declining popular support for the SL among the general population in the VRAEM.

2013 Terrorist Incidents: According to the Government of Peru, the SL carried out 49 terrorist acts, a noticeable decline from the 87 reported acts it committed in 2012. The SL has not conducted any major operations against Peruvian security forces since Alipio and Gabriel were killed in August, except for repeated sniper fire at military outposts in the central VRAEM, particularly Union Mantaro."

Peru's VRAEM-Upper Huallaga Region:

Source: Insightcrime.org

Connection between Crime and Terror

According to USSOUTHCOM, members, supporters, and adherents of transnational terrorist organizations are present in Latin America. Members of these organizations routinely visit the region to recruit, establish business venues to generate funds, and expand their radical networks.[480]

Nevertheless, according to the U.S. Department of State's *2013 Bureau of Counterterrorism Report*, there were no known operational cells of either al-Qaida or Hezbollah in the hemisphere.[481] The report adds that although ideological sympathizers in South America and the Caribbean have continued to provide financial and ideological support to those and other terrorist groups in the Middle East and South Asia; the Tri-Border area of Argentina, Brazil, and Paraguay have continued to be an important regional nexus of arms, narcotics and human trafficking, counterfeiting, pirated goods, and money laundering – all potential funding sources for terrorist organizations.[482]

In his February 26, *2014 Posture Statement before the 113th Congress*, General John F. Kelly, USMC, Commander of the USSOUTHCOM, refers to this possible crime and terror connection in Western Hemisphere as the "Crime-Terror Convergence."[483] An extract of General Kelly's analysis of this threat is below:

"(…) clearly, criminal networks can move just about anything on these smuggling pipelines. My concern, Mr. Chairman, is that many of these pipelines lead directly into the United States, representing a potential vulnerability that could be exploited by terrorist groups seeking to do us harm. Supporters and sympathizers of Lebanese Hezbollah are involved in both licit and illicit activities in the region, including drug trafficking. Additionally, money, like drugs and people, has become mobile; it is easier than ever before, and the vast global illicit economy benefits both criminal and terrorists networks alike. Clan-based, Lebanese Hezbollah-associated criminal networks exploit free trade zones and permissive areas in places like Venezuela, and the Argentina, Brazil and Paraguay Tri-border to engage in money laundering and other illegal endeavors, as well as recruitment and radicalization efforts.

Additionally, Lebanese-Hezbollah has long considered the region a potential attack venue against Israeli and other Western target, and I remain concerned that the group maintains an operational presence there. Lebanese Hezbollah's partner and sponsor, Iran, has sought closer ties with regional governments, largely to circumvent sanctions and counter U.S. influence. As a state sponsor of terrorism, Iran's involvement in the Western Hemisphere is a matter of concern." **General John F. Kelly**

Territorial and Regional Disputes

According to the United States Institute of Peace, since 2000, five Latin American boundary disputes between neighboring states have resulted in the use of force; two other border disputes have required the deployment of military forces.[484]

Interstate conflict over territorial boundaries is relatively frequent in South America, but actual warfare between states is rare.[485] Disputes sometimes escalate to military conflict because states employ low levels of forces, but such escalations rarely reaches full-scale war.[486] However, in 1995 Ecuador and Peru went to war, resulting in more than a thousand deaths and injuries, and significant economic loss.[487]

Key reasons for low interstate conflict in South America (extracted from the United States Peace Institute publication *Boundary Disputes in Latin America*).[488]

- **Innovative international regional institutions and procedures,** that began to develop in the nineteenth century and blossomed in the twentieth century, fostered and consolidated interstate peace, and provided effective international mediation when interstate war broke out.
- **The ideology of a shared identity** also fostered interstate peace. For a long time, Latin Americans have not believed that a neighboring country was their enemy.

Recommended Reading:

For additional information on Boundary Disputes in Latin America:

Jorge I. Domíngues et al., *Boundary Disputes in Latin America* (Washington, DC: United States Institute of Peace, Peaceworks No. 50, September 2003).
Available at:
http://www.people.fas.harvard.edu/~jidoming/images/jid_boundary.pdf

"Maritime Dispute (Peru v. Chile), *International Court of Justice* (January 27, 2014).
Available at:
http://www.icj-cij.org/docket/files/137/17928.pdf

In 2008, Peru filed an application at the International Court of Justice in the Hague (ICJ) requesting the court to mediate a maritime dispute between Peru and Chile.[489] The dispute traced back to the nineteenth century and the

"War of the Pacific" (1879-1883) between Chile, Peru, and Bolivia, which was related to control over nitrate resources in the Atacama Desert.[490]

The Maritime Boundary Lines Claimed by Peru and Chile Respectively

The claimed areas are shown below in "sketch-map No. 2" of the court's judgment (Peru vs. Chile). Peru argued that if the parallel of latitude method of delimitation was adopted, then, at the end of the common boundary, it was entitled to exercise exclusive sovereign rights over a maritime area lying out to a distance of 200 nm from its baseline (and beyond 200 nm from the Chilean baseline). Peru referred to this area as the "outer triangle" (*shown below shaded in blue*).[491]

On January 27, 2014, the ICJ awarded Peru control of approximately 50,000 sq. km of ocean, but confirmed Chile's hold over inshore waters rich in fish. The decision was arbitrary but broadly fair—less than Peru had hoped for, but less bad than Chile had feared.[492]
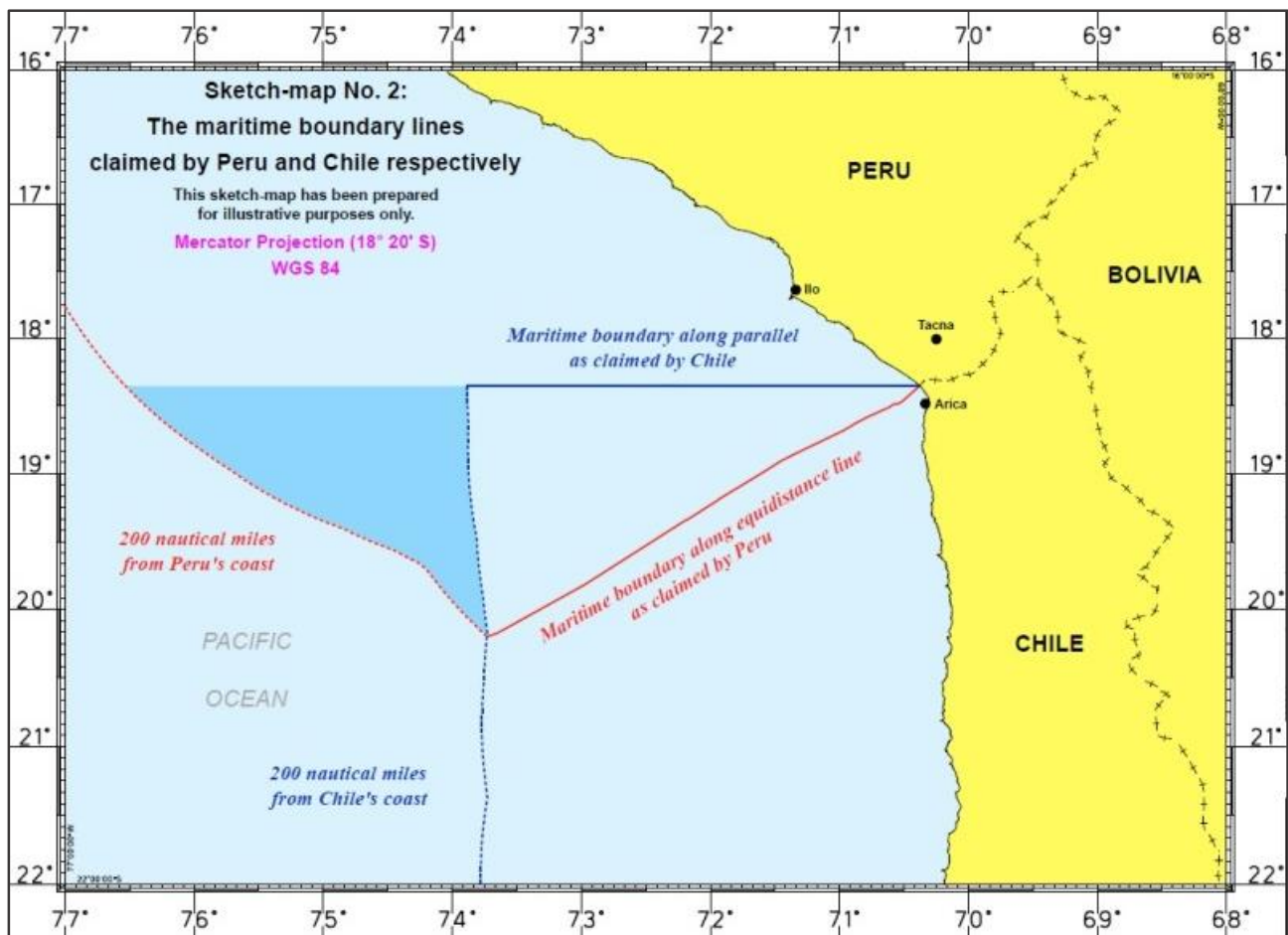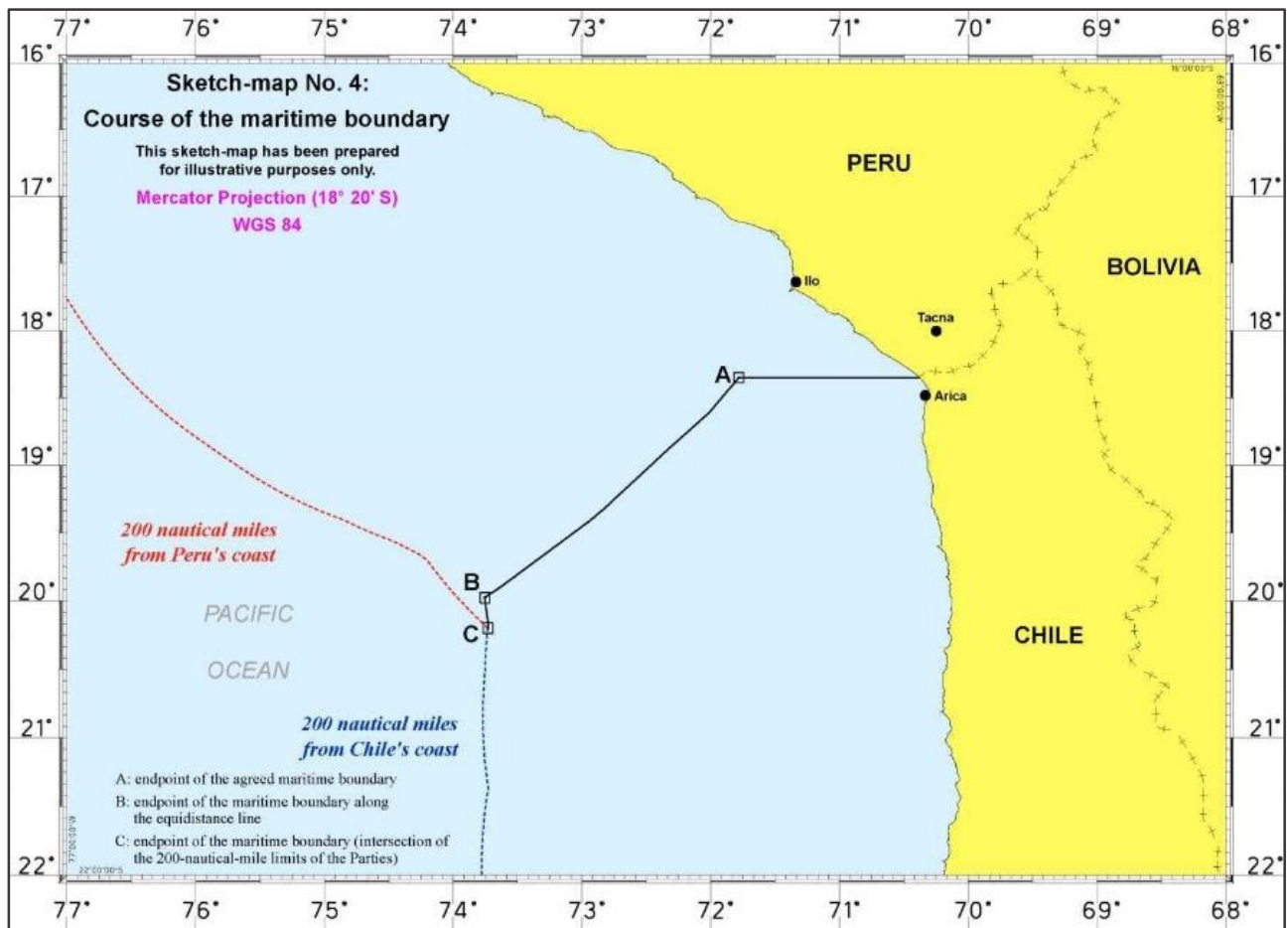

Source: ISJ

Maritime Boundary as Arbitrated by the ICJ

Ultimately, the court created a boundary that neither Peru nor Chile had sought. The court delimited the starting point (Boundary Marker No. 1) and a parallel maritime boundary line that extended 80 nm (Point A) on the basis of a tacit agreement. Beyond that initial 80 nm segment, the court called on customary international law in order to delimit the seaward boundary related to overlapping claims out to 200 nm (Point B), then dropping down to where the maritime entitlements of the parties end (Point C). The final boundary declared delimited by the court is shown in sketch-map No. 4 of the judgment (Peru v. Chile, para 195)."[493]

The next dispute to be settled is Bolivia's request to the ICJ seeking an order that Chile grant to Bolivia a corridor to access the Pacific Ocean; a claim that has a common genesis in the nineteenth century War of the Pacific.[494] However, Chile has stated that Bolivia's claims have no historical or legal grounds.[495] Bolivia and Chile have had limited diplomatic relations since 1978, and attempts to negotiate to redraw the border have previously failed.

Source: ICJ

Recent Regional Disputes

In 2008, within seven days, the Andean region went from the brink of war to a grudging peace.[496] A Colombian military attack against the terrorist organization FARC in Ecuadorian territory (without the consent of Ecuador) precipitated a diplomatic and military crisis among the two Andean nations. Tensions in the Andean region escalated when former Venezuelan president mobilized ten battalions near the Colombian border, stating that a similar incursion in Venezuelan territory would constitute an act of war.[497] It should be noted that while such disputes have rattled relations between regional countries, they have not permanently impacted bilateral ties.[498]

Other Defense and Security Challenges

In addition to security and defense threats such as narco-trafficking, crime, TCOs, and guerrillas, Dr. Evan Ellis (Professor of Latin American Studies at the Strategic Studies Institute, U.S. Army War College) identified several other security challenges facing South American countries. According to Dr. Ellis, the region will continue to face indigenous resistance to integration and development, and new technologies will spur cyber-attacks. These technological defense and security challenges will result in Latin American militaries continuing to play an important role in combating transnational organized crime and internal security issues, just to mention a few.[499]

Indigenous Conflicts

Indigenous resistance to integration and development has been precipitated by events like the one that took place in Ecuador, when the indigenous organization Conaie turned against its one-time ally President Rafael Correa over new mining laws; in Bolivia, groups of Aymara and lowland indigenous people turned on President Evo Morales for similar reasons.[500] In Peru, an indigenous backlash over new mining and oil infrastructure in the Amazon have also sparked violent protests. In addition, Dr. Ellis refers to the following events currently under way in the region:

> "In Ecuador, the opening of the Yasuni National Park for drilling in 2013 and new open pit mining operations in Zamora Chinchipe by the Chinese firm Tongling has the potential to produce problems with indigenous peoples. In Peru, problems are likely to escalate in at least one of the five major Chinese mining projects, although difficulties to date in Toromocho and Rio Blanco have not yet caused problems on the scale seen in Bagua in 2009 or Cajamarca currently. In Bolivia, the showdown between indigenous groups and the Morales government over a highway through the Tipnis national park is a theme that is likely to play out again with other projects in the future. New projects such as the recently completed Bioceanico Sur connecting Brazil to the Pacific at Ilo Peru; the nearly complete Bioceanico Norte connecting Brazil to Paita, the Manta-Manaus corridor; and the just-noted interoceanic corridor connecting from the north of Chile across Bolivia, will open up

previously isolated indigenous lands in the Amazon to new settlers, illegal loggers, drug traffickers, and other groups, escalating the conflict."[501]

Cyber Attacks

Cyber-crime is a transnational problem which is increasingly becoming an important security concern in Latin America. Over half of Latin American companies reported cyber-attacks such as malware, fraud, and phishing in 2012.[502] The countries with the highest incidence of reported malware infections were Venezuela (71%), Bolivia (67%), with Colombia, Brazil, Ecuador and Peru being above the 50% mark.[503] Countries with high internet use are particularly targeted, especially Brazil, Uruguay, Argentina and Chile.[504]

Even though South American countries are passing laws addressing cyber-crime, and creating programs such as the Community Emergency Response Teams (CERT) and Computer Security Incidence Response Teams (CSIRT), differences in national laws make it difficult for countries in the region to make a concerted effort against cyber-crime.[505]

An Organization of the American States (OAS) report entitled *Latin American and Caribbean Cybersecurity Trends and Governments Responses*, states that while organized crime groups, such as narco-traffickers, have embraced cyber-crime, the governments of many Latin American countries have not been able to adequately defend themselves against this type of crime.[506]

The Armed Forces and Police Duties

Non-state aggression has intensified in South America, and the region's armed forces have frequently supported surge actions of federal and state police. The U.S. has provided both funding and financial support to police reform and improvements in the region, especially in Colombia, Peru, and, to a lesser extent, Ecuador.[507] Not all countries in South America need support for police reform from the United States; this is particularly true for Argentina, Brazil, and Chile.[508] Colombia's police have considerably improved as a result of internal reforms and U.S. assistance, according to Dr. Ellis. He notes that in the Southern Cone, the armed forces are likely to continue to support police and border security in counternarcotic missions, particularly in Uruguay, where military resources are

Former MINUSTAH troops in the slums of Rio de Janeiro, Brazil (Source: Infosurhoy, photo by Renzo Gostoli)

particularly limited.[509] In Argentina, TCO drug activities will become an increasing priority for public security forces such as the coast guard, the federal police, and the gendarmerie; although traditional armed forces will continue to be kept out of the mission by law.[510]

In Brazil, the *Fusileiros Navais* (Brazilian Marines) and the Brazilian Army work jointly with the police and Special Forces as security forces continue to take control of the slums in Rio de Janeiro, and push out heavily armed drug gangs that have ruled Rio's shantytowns for decades.[511] This joint effort between the Brazilian Armed Forces and the police in the so-called "Pacification Program" begun in 2008, and the violence and shootouts in the slums have undoubtedly diminished.

The text in the table below was extracted from the UNODC (2013)[512]

<div>

Brazil Case – Pacifying Police Units (UPPs)

"**Rio de Janeiro, Brazil**: progress in [crime] prevention Brazil has made significant inroads in combating gangs and related violence in recent years. In particular, an innovative program known as *Unidades de Policia Pacificadora* (Pacifying Police Units (UPPs) has been instituted in favelas, or slums, in Rio de Janeiro, which have become the base of operations for many organized criminal groups and, with competing criminal factions vying for territory, are also traditionally the most violent parts of the city.   UPPs   have   been instituted in several favelas since 2008/2009 to provide traditional community "proximity" policing, while consolidating State control over those communities and linking them to State social services. As of November 2013, 34 units were in operation in 226 communities, benefiting over 1.5 million people. UPP officials are given specialized education and training, notably in human rights and modern policing techniques, with the aim of taking control back from the gangs and promoting long-term security.

Official data attest to a decrease in homicide and robbery rates since the UPP program began. The trend in homicide incidents was decreasing in the areas now controlled by UPPs prior to their implementation, but those areas have experienced a continued decline in the number of homicides since the program commenced; and they all show a greater decrease than the one recorded in the city of Rio de Janeiro over the same period of time.

It is noteworthy that the number of reported sexual assaults in the same period significantly increased in communities where UPPs operate (by almost 200%). This recent trend may be attributed to higher rates of reporting of those crimes, which may be interpreted as growing trust in the police, or be due to better recording practices.

There is also broad support for the UPPs from favela residents. For example, 66 percent of those surveyed in Santa Marta and Cidade de Deus approved of the program in 2009. In 2010, 93 percent of residents in UPP areas felt safer, while 70 percent of residents of communities without UPPs would have liked the program implemented in their neighborhood. The installation of UPPs is an important acknowledgement that social inclusion and community development are key components in preventing crime. They facilitate or promote security and access to social services, as well as help create opportunities for social and economic development."

</div>

Suggested Movies:

To learn about life in one of the largest Brazilian slums (one that is now "pacified" by the UPPs) as well as the actions of the Special Forces to combat crime in the slums, watch the movies below:

"City of God" (2002).
Available at:
http://www.imdb.com/title/tt0317248/
(Also available in *YouTube)*

"Elite Squad (2007)"
Available at:
http://www.imdb.com/title/tt0861739/

"Elite Squad: The Enemy Within (2010)."
Available at:
http://www.imdb.com/title/tt1555149/

Recommended Reading:

For additional information on Armed Forces involvement in police duties in South America:

Bradley Brooks, "Brazil Police Push into Rio de Janeiro Slums," *AP* (March 30, 2014).
Available at:
http://bigstory.ap.org/article/brazil-police-push-slums-rio

Stephen Johnson, Johanna Mendelson Forman, Katherine Bliss, "Police Reform in Latin America," *Report of the CSIS Americas Program* (February 2012).
Available at:
https://csis.org/publication/police-reform-latin-america

Read all about the UPP's actions in the slums of Rio de Janeiro, Brazil at *Dialogo – Military Digital Magazine*:

http://dialogo-americas.com/en_GB/search?utf8=%E2%9C%93&by_date=0&q=UPP&x=0&y=0

Case Study: Rio de Janeiro's *Favelas*

The case study in this chapter introduces a culture from the South America region, using the concepts introduced in the Operational Culture General (OCG) document (see attached document).

Introduction

In the previous lessons, you reviewed various aspects of the physical and human terrain of South America, and the security issues of the region. This lesson explores Operational Culture in a case study of a distinct group in South America: Rio de Janeiro's *Favelas*. This case study begins with a brief overview of the origin of the *Favelas*. Then, it explores Rio de Janeiro's *Favelas* through the lens of the Five Dimensions of Operational Culture. Lastly, this case study incorporates how the concepts of identity, holism, change, variation, mobilization, and reciprocity apply to the culture.

As you read through the chapters of this case study, please keep in mind the Culture General Concepts and the Five Dimensions approach you have previously learned.

The Physical Environment of Rio's *Favelas*

Favelas are informal settlements that exist in several Brazilian cities. They are most noticeable in Brazil's second largest city, Rio de Janeiro, because of its unique topography and the sheer size of its *favela* population.

The experience of *favela* residents with exclusion, income inequality, unemployment, government indifference, dominant drug gangs, and police brutality has served to form a somewhat cohesive group that shares a common identity; although there is considerable variation among the several dozens of *favelas* in Rio.

> **Recommended Reading:**
>
> To understand the origins of the *Favela* and details on the *Canudos* conflict, one of the bloodiest in Brazilian history, watch:
>
> War of *Canudos* in Brazil, *BBC Broadcasts*. Available at: http://www.bbc.co.uk/programmes/p0205w53
>
> "On the Origin of "Favela," *Rioonwatch.org*. Available at: http://www.rioonwatch.org/?p=2920
>
> "A History of Favela Upgrades Part I: 1897-1988," *Rioonwatch.org*. Available at: http://www.rioonwatch.org/?p=5295

Social inequality, high murder rates, unequal economic development, well-armed dominance of organized criminal networks, absence of state presence, lack of rule of law, and pervasive corruption are common threads among most *favelas*.

Understanding the dynamics and conditions inside today's *favelas* will help you better understand how South America's major issues shape and impact the lives of some of the region's millions of marginalized people.

Origins

The first *favela* in Rio de Janeiro can be traced back to 1897, when decommissioned soldiers from the Canudos War arrived in the city and pitched their tents on a hillside; alongside some emancipated slaves waiting in vain for land grants promised by the government.[513] The decommissioned officers are said to have coined the term *favela* either after Monte Favela in Brazil's northeastern Canudos or after a bush grown on that hillside that reminded them of a hardy bush also found in Canudos.[514]
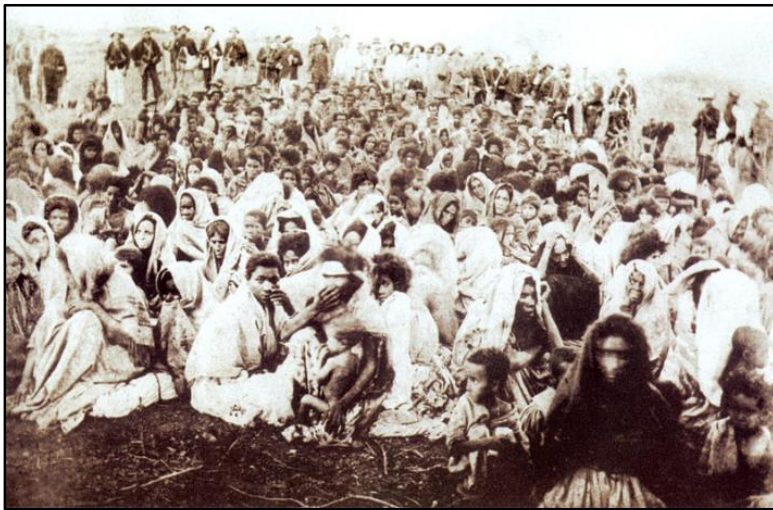
Surviving population of the Canudos War, in Brazil, 1897, after a peasant rebellion was crushed by the Brazilian Army. Many of the survivors escaped later to larger cities, where they lived in shanty towns (*favelas*) (Source: Wikimedia)

After 1902, the size and number of *favelas* in Rio de Janeiro grew considerably. That year, Rio de Janeiro's mayor implemented an urban reform policy intended to replicate measures implemented in Paris. He ordered the demolition of 1,691 *cortiços,* downtown housing units for low-income families.[515] Thousands of evicted *cortiço* residents were forced to move to uninhabited lands, particularly the hillsides.
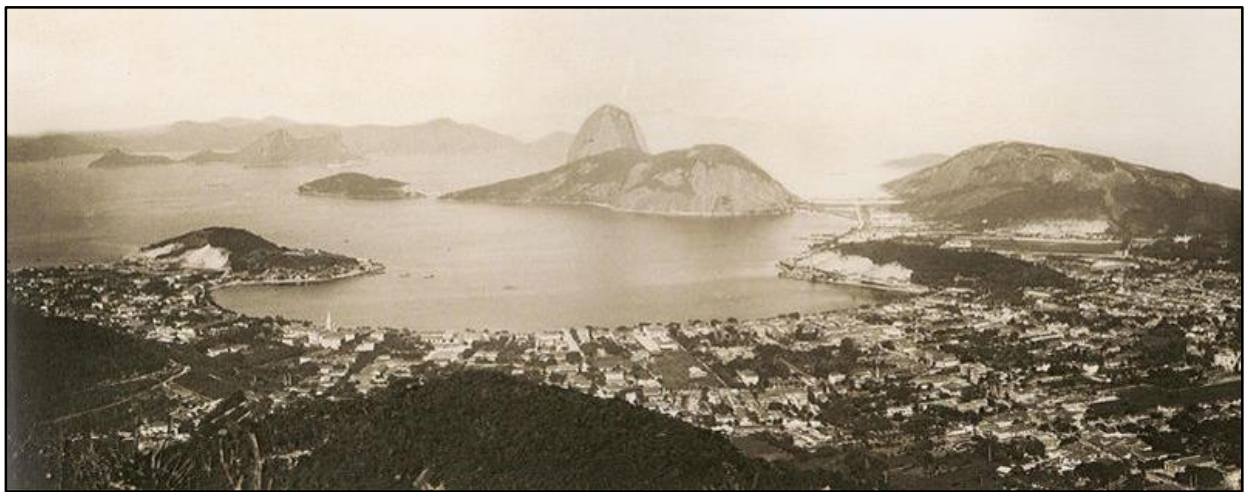
City of Rio de Janeiro, 1889 (Source: Wikimedia)

Growth of these settlements was further accelerated in the twentieth century with the new wave of rural migration to the cities after the slave abolition in 1888.[516] With Rio de Janeiro being unable to absorb this large influx of migrants, hillside shantytowns expanded significantly.[517] In the 1920s, *favela* became the generic term for these squatter settlements.

Rocinha Favela (Source: Wikipedia, photo by Chensiyan)

Rocinha (the name means "Little Farm") - began taking shape about 90 years ago. Poor black migrants from the northeastern state of Ceará, one of Brazil's least-developed and most drought-stricken regions, began to occupy a sugar-cane and coffee plantation on the outskirts of Rio.[518] The migration picked up during the worldwide depression of the 1930s, and never slowed; by the early 1970s, following a three-year struggle, the state government began to pipe municipal water into the *favela*.[519] Rocinha expanded up the hillsides: Structures of brick and concrete replaced flimsy wooden shanties; utility companies introduced electricity, phone lines and other basic services.[520] Today, Rocinha has a population of between 120,000 and 175,000 - an official census has never been taken, making it by far the largest of Rio de Janeiro's roughly 1,000 *favelas*.[521]

How People Use the Environment

Human beings have always relied on their physical environments for survival. Therefore, it comes as no surprise that each culture has developed its own unique way of interacting with its environment.

The first dimension discussed in this case study examines how the physical environment influences the *favelas*, and how the *favelas* respond to the environment. You should look at this through the lens of "environmental possibilism." That is the idea that any given environment allows a range of possible responses, and each culture adapts in a different away. How did the *favelas* respond and adapt to its physical environment?

The fourth largest megacity in Latin America, Rio de Janeiro, is a coastal city located in southeastern Brazil.[522] Its topography is marked by white sandy beaches, steep hills, low-lying areas, and lush vegetation at higher altitudes. The starkly contrasting landscape of low-lying areas surrounded by steep hills is particularly apparent in the city's affluent South Zone. This contrast between landscapes

causes the *favelas* to stand out more dramatically than the *favelas* of other Brazilian cities, such as São Paulo, where the terrain is more leveled. Since Rio's "many *favela*s are on hillsides and located alongside wealthy neighborhoods, it visually illustrates the vast income disparities in Brazilian society.

Favelas are not concentrated in one area of the city. They are spread out and outlining Rio's outward growth and job locations, starting in the city's downtown area and affluent South Zone, and spreading to the industrial North and West Zones. In the South Zone, *favelas* are most commonly found on steep hillsides, while in the North and West Zones, they are found on rolling hillsides and flat terrain.**[523]**

These settlements are marked by narrow, winding streets and alleys, and thousands of homes built close to one another. Although some dwellings are the jerry-built shacks, typically found in many slums around the world, many *favelas* in Rio de Janeiro, particularly the older ones, feature brick and mortar dwellings, paved streets, running water, and electricity.[524]

Despite the level of urbanization in many of Rio de Janeiro's *favelas*, a clear distinction exists between *favelas* and their residents on the one hand, and the surrounding city of Rio de Janeiro on the other.[525] While buildings in the wealthier surrounding areas show a higher socioeconomic status, *favelas* clearly display much lower income levels. This socioeconomic gap is reinforced by many social clues like clothing, speech, and body language that enable non-*favela* residents to easily identify a person's wealth, education, occupation, and place of residence.[526] These visual clues often lead to discrimination, and help to shape a *favela* resident's daily interactions outside the communities.[527] Living in a *favela* also tends to have a detrimental effect on a resident's ability to obtain a job, further reinforcing socioeconomic conditions.
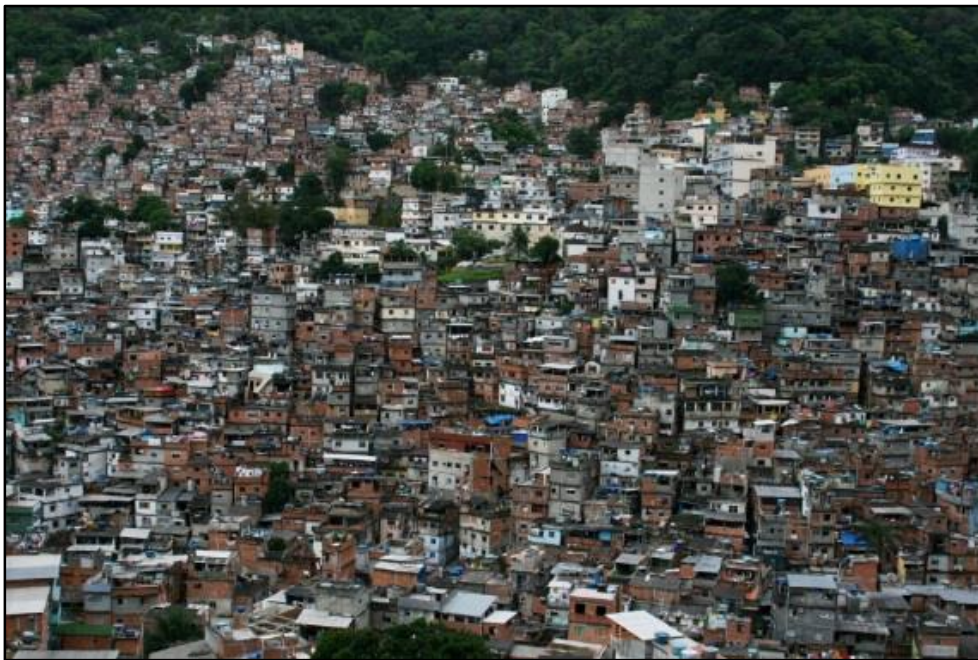
Rocinha slum in Rio de Janeiro, Brazil (Source: Wikimedia, photo by Leszek Wasilewski)

The Economy of Rio's *Favelas*

In the U.S., the phrase, "the economy," usually is associated with things like money, banks, and the stock market. These things do indeed make up the economy, but not all of it, and they are much more important in some countries than in others.

The economy of a culture includes everything that the people in that culture do to produce and distribute the goods and services that they need to survive, or simply want. For these reasons, we will examine the economy of the *favelas,* and the ways they manage to thrive or merely to survive.

Favela residents are tightly integrated into a city's formal economy through their jobs as maids, construction workers, bus drivers, and street vendors. However, many *favela* residents are paid a "salary of poverty" that does not adequately cover the costs of the most basic needs.[528]

Income Distribution

The disparity between *favela* and non-*favela* incomes is clear in Rio de Janeiro's wealthy South Zone, where the average *favela* income is five to six times less than the surrounding neighborhoods.[529] While the affluent neighborhoods of Gávea and Lagoa in the South Zone have living standards comparable to several Scandinavian countries, the large North Zone group of *favelas,* called Complexo do Alemão, has lower living standards than the African countries Gabon and Cape Verde.[530]

High unemployment rates have been typical in *favelas* due to a continuous decline in Rio de Janeiro's economy, and the difficulty for *favela* residents to find jobs due to discrimination.[531] *Favela* residents were, for many years, directly impacted by a trend of job losses in Rio, precipitated by several larger political and economic factors impacting the city. These trends include Brazil's relocation of its national capital from Rio to Brasilia in the 1960s; and the move of Brazil's financial, intellectual, and cultural center from Rio de Janeiro to its largest city, São Paulo. Rio's loss of heavy industry to other parts of Brazil, and the impact of violence on tourism has caused additional hardships.**[532]** These conditions impacted job opportunities for the city as a whole, but especially for the already marginalized and vulnerable *favela* residents. Additionally, *favela* residents face discrimination on a daily basis because of their place of residence. *Favelas* are typically associated with violence and drug gangs, and the stigma of living in these communities can become a major obstacle to being hired.[533]

According to Brookings Institute scholar, Vanda Felbab-Brown, one of the acute dilemmas that law enforcement in the retaken territory encounter is whether or not, how quickly, and in what form to suppress illegal economies that exist in the retaken territory.[534]

"Often illegal economies - such as local drug trade and distribution in Rio's *favelas* represent the mainstream economic activity of the urban slum such as in the case of the cocaine distribution in Rio's *favelas* supplying Rio's middle and upper class residents in the rest of the city. Communities surrounding the consumer groups may be putting pressure on the government to suppress the flows. Even if the state is actually successful in disrupting the flows in a particular locale, as long as demand persists, the trade will simply relocate elsewhere."[535]

Drug Gangs as an Alternative

In *favelas* dominated by the drug traffic, drug gangs are often viewed by unemployed, disenfranchised youth as an attractive alternative. As a *favela* resident explains, "Kids now prefer to enter the traffic because they earn more money than if they stay in school and then go out looking for work. They can show off their brand name clothing and shoes. That's why, today, those who orient the youth and become their role models are the *traficantes* (drug dealers)."[536] Boys between the ages of 14 and 18 are particularly at risk.[537]

School is mandatory through the age of 14, mandatory military service starts at age 18, and formal employment is hard to find before that age. This employment age-gap is causing *favela* youth to pass through a dangerous four-year period when drug trafficking might appear attractive.[538]

Internal Economy

The income disparity and unemployment levels in Rio de Janeiro's *favelas* could lead one to believe that there is little or no economic activity taking place inside of these communities. To the contrary, *favelas* have a vibrant internal economy with bustling commerce, many businesses, and a flourishing real estate market. *Favelas* have pharmacies, bakeries, restaurants, bars, and beauty parlors. Shops in the *favelas* sell shoes, clothes, electronics, and furniture. *Favela* residents' access to commerce is evidenced by the consumer goods found in many households, including washing machines, televisions, air conditioners, microwave ovens, and personal computers.[539] This indicates that, despite unemployment and income inequality, *favela* residents have been able to establish a vibrant internal economy that caters to their needs and income levels.**[540]**

Income Levels

It should be noted that although many *favela* residents tend to be poor, there is variation in income levels between *favela* residents, as well as between different *favela* communities. Not every *favela* resident is necessarily poor, with different income levels evident within one *favela* community. For example, some *favela* residents who earn a higher living have chosen to remain in the *favelas*, rather than move to other neighborhoods, given that their social network

is already established, and such communities have been the only home they have known. Additionally, income levels vary depending on the location of these communities. *Favelas* located in the affluent South Zone, where most jobs in the city are located, have higher incomes than those situated in the North and West Zones, where a process of deindustrialization has negatively affected the availability of jobs.[541]

According to the Organization of Civil Society in Rocinha, a social welfare group, only 5 percent of this *favela's* population earns more than $400 a month, and more than half its adults are unemployed.[542] Eighty-one percent of working residents have low-paying jobs in service industries, such as hair salons and Internet cafés.[543] The illiteracy rate for those over age 60 is nearly 25%, and despite the improvements in the level of education, one-quarter of youths between the ages of 15 and 17 are not in school.[544]

Permanent Police Pacification Unit – UPP and "UPP Social:" Known by its Portuguese acronym "UPP" or "UPPs." An UPP refers programs being implemented by the government of Rio de Janeiro in Rio's *favelas*. The UPP is a multilayered effort to establish security and bring a wide variety of government services and social benefits (UPP Social or UPPs) to several dozen *favelas* in Rio. [*Several aspects of the UPP's will be discussed throughout this chapter.*]

The table below was translated from the government of Rio's statistical document on the UPP Rocinha, *UPP Social, Panorama dos Territórios UPP Rocinha,*" *Rio Prefeitura* (2010):[545]

The map below presents data relating to the following income ranges: up to half of minimum wage (R$250 = US$111,74); more than ½ to 1; more than 1 to 2; 2 to 3; and more than 3 minimum wages. Such income ranges correspond respectively to the values of: up to R$ 255.00 (US$113.97); between R$ 255.01 and R$ 510.00 (US$227.94); between R$ 510.01 and R$ 1,020.00 (US$455.88); between R$ 1,020.01 and 1,530.00 (US$683.82); and more than R$ 1,530.01. According to the table below, 20, 1.4% of household heads at Rocinha have incomes below and up to minimum wage, this percentage is very different than the one found at the Lagoa (moistly a middle class neighborhood) which is only 0.3 % for that low income group. The largest discrepancy exposed by the data below deals with the percentage of heads of household who receive more than 3 minimum wages. At the Lagoa and in the municipality of Rio de Janeiro this percentage is 72.2% and 33.3%, respectively, and at the Rocinha it is only 4.1%.
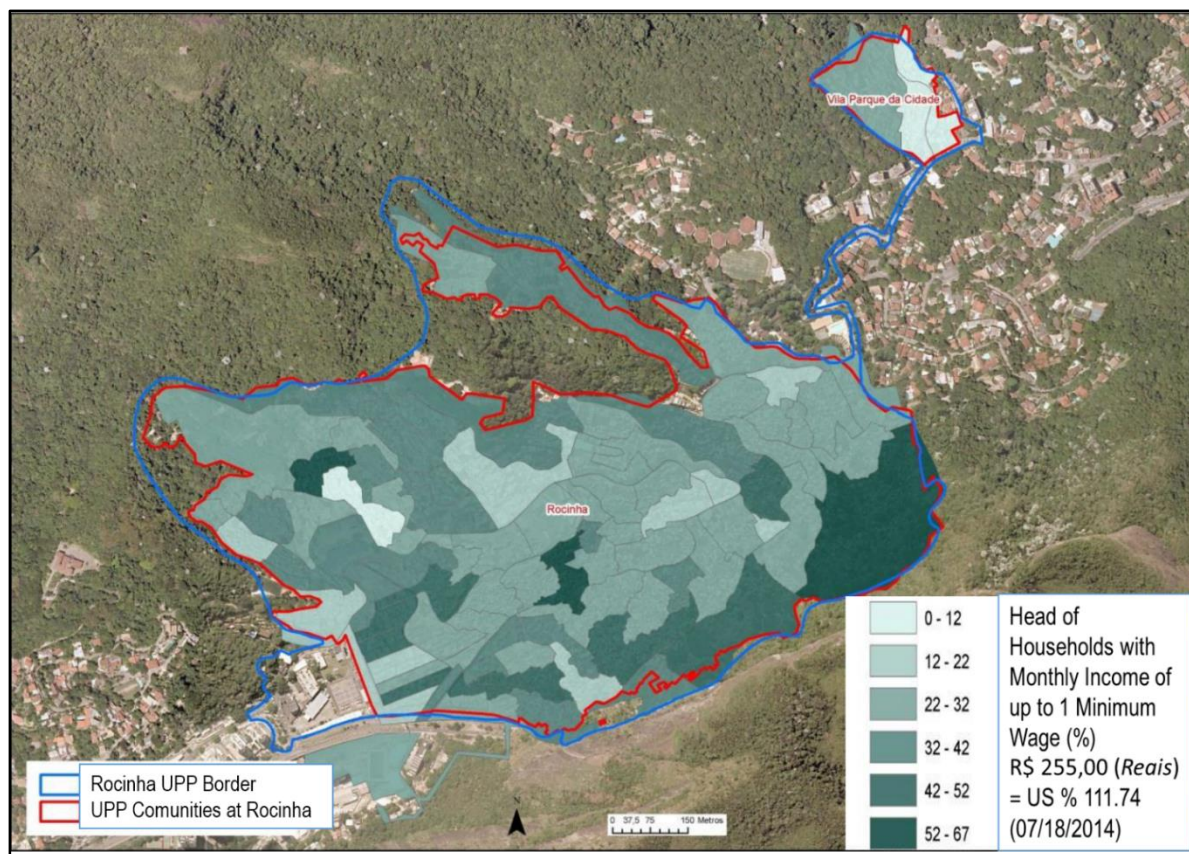
Map of Head of Households with Monthly Incomes of up to 1 Minimum Wage (R$255.00) (Source: UPSocial.org)

Recent Economic Changes

Federal government assistance programs such as *Bolsa Família* (Family Grant), have helped many *favela* families with federal grants for keeping their children in school, thus providing them with an additional source of income.[546] With this new purchasing power, a new lower-middle class has emerged; this has caused a noticeable increase in commercial activity inside the *favelas*. In some of Rio de Janeiro's most centrally-located and well-established *favelas*, such as Rocinha, big businesses have started to move in. In November 2012, it was widely reported that one of Brazil's largest retail chains, Casas Bahia, had inaugurated a large store inside the *favela*.[547]

Middle Class definition: In July 2013, the Brazilian government defined "middle class as a household with a monthly income between R$ 291 and R$ 1,019 (Brazilian Reais or US$126.76 and US$443.89 respectively, with September 10, 2014 exchange rates).[548]

Despite these economic changes, some experts disagree over the assessment that many *favela* residents have attained middle class status. They point to *favela* residents' lack of access to many basic middle class pursuits, such as foreign travel and enrollment of children in better private schools. Additionally, these experts note that this new class still depends on government assistance. Ultimately, residents of *favelas* occupy a position in society that remains constant, despite evidence of higher levels of consumer spending.[549]

THROUGH THE LENS OF RECIPROCITY: Gang Leaders Provide For the Community

Brookings Institute scholar, Vanda Felbab-Brown, points out that non-state entities such as criminal gangs and drug trafficking organizations use the proceeds of illegal activities to deliver otherwise absent socioeconomic goods to the communities in slums.[550] The more they deliver order, security, and economic goods, the more they become de facto proto-state governing entities.[551] The following summarizes a common view of some slum residents regarding the benefits gangs bring to the community:[552]

"In 2005, after police killed previous leaders, gang power at the Rocinha slum passed to Amigos dos Amigos (Friends of Friends), Antonio Bonfim Lopes, otherwise known as Nem, a 29-year-old who earned $2 million a week from cocaine sales.[553] According to Rocinha residents, "he employed 50 old ladies to help manufacture and package the cocaine." He was considered by some "an exceptional person - if somebody needed an education, a job, he would get it for them. He helped everybody, he never touched drugs himself or resorted to violence. He was an administrator. There are bigger criminals running around—like ministers, big businessmen—and they are not arrested."[554]

Real Estate Speculation in Recently Pacified *Favelas*

According to the non-governmental organization (NGO), *Rio on Watch*, real estate speculation has already hit Complexo da Maré, despite the *favela* still not having a Permanent Police Pacification Unit (UPP). Complexo da Maré is currently occupied by the army.[555] For example, the announcement of occupation alone made prices soar, with a studio apartment in Nova Holanda rising in price from R$12,500 (US$5,600) to R$60,000 (US$27,000).[556] Community organizers claim that "those who leave the *favela* give up their relationships and end up getting poorer."[557]

Suggested Videos:

To see videos about the "Slum tourism" in Rio:

Bloomberg News, "Slums as Tourist Destinations: Inside a Rio Favela." Available at: https://www.youtube.com/watch?v=9P_3atNAPDM

THROUGH THE LENS OF HOLISM: How to avoid *favela* residents being pushed out by higher real estate value?

As seen above, as the *favelas* of Rio get pacified and safer, real estate prices are soaring, pushing out the longtime *favela* residents it intended to protect. Several community organizations are demanding new laws to protect them from this process, which has become known as gentrification.

Social Structure of Rio's *Favelas*

Each culture has its own pattern of relationships that define the interactions people can have with one another. We call this pattern the "social structure." This social structure may not be readily visible, especially to outsiders who have grown up in another culture.

The third dimension of this case study examines the social structure of the *favelas*, and aspects of that structure that make them unique or different from other cultures. Forged by their adaptation to harsh and unwelcoming conditions in the urban cities of Brazil, *favelas* are one of the many close knit communities of South America's marginalized urban poor. Their daily struggles with poverty, fear, violence, and exclusion illustrate the great urban divide caused by a closed class system that limits economic opportunities and personal advancement for the poor, and the pernicious effect of drugs and organized crime on poor communities.

Human Geography

Rio de Janeiro has an exceptionally large *favela* population. One-fourth of Brazil's entire *favela* population lives in the *favelas* of Rio, and one-third of Rio de Janeiro's entire population lives in these communities.[558] Rio de Janeiro's *favelas* are marked by exceptional growth rates, which have exceeded that of the city in every decade since the beginning of the twentieth century, except in the 1970s when the government forcibly removed several of these communities.[559] These high growth rates are the result of migration to the city and natural growth.[560]

With such high growth rates, *favela* communities are marked by a clear youth bulge, with the majority of the population comprised of young children and young adults between the ages of 10 and 30.[561] The population density of *favelas* is also 10 times higher than that of the formal city.[562] These growth rates have led to the formation of several contiguous *favela* agglomerations, known in Portuguese as *complexos,* and their size is similar to that of many Brazilian cities.[563] One of the most violent and neglected areas in Rio de Janeiro, the Complexo do Alemão, comprises 12 favelas,[564] and is so large that it has become its own administrative region.[565]

Language

While *favela* residents all speak Portuguese, like other Brazilians, some *favela* residents can be distinguished from residents of the formal city based on their speech mannerisms and particular use of slang words.[566]

Rocinha Age Groups in Comparison to Other Communities in Rio de Janeiro

Community	Age Group									
	0 to 14		15 to 29		30 to 64		65+		Total	
Rocinha	17,478	25%	22,402	32%	28,785	40%	2,420	3%	71,085	100%
Lagoa	12.9%		18.9%		50.5%		17.7%		100%	
Rio de Janeiro	19.4%		24.1%		46%		10.4%		100%	

Source: IBGE Census Bureau (2010)[567]

Graphs – Age Pyramids of the Rocinha and Lagoa (2010)

Rocinha Community   **Lagoa**

The table below was translated from the government of Rio's statistical document on the UPP Rocinha, "*UPP Social, Panorama dos Territórios UPP Rocinha,*" *Rio Prefeitura* (2010):[568]

The age pyramids above show the age distribution of the population of two distinct communities in Rio, the Rocinha and a middle class neighborhood, Lagoa that borders Rocinha. The pyramids look strikingly different because the base of the UPP Rocinha pyramids is wider, demonstrating a significantly younger population between 0 to 29 years old (57 %), while the Lagoa base is much narrower. The largest discrepancy is among the elderly population. In the Lagoa pyramid, the top is wide, showing a large elderly population, especially of women. The UPP Rocinha's pyramid shows exactly the opposite, that after 30 years of age, the overall population (men and women) starts to diminish until it reaches only 1 % on the age range that starts at 70 years old.

Education

The table below was translated from the government of Rio's statistical document on the Rocinha, "*UPP Social, Panorama dos Territórios UPP Rocinha,*" *Rio Prefeitura* (2010):**[569]**

Illiteracy among the population 15 years old or older – This is an important social economic indicator that exposes the high degree of social vulnerability. There is a significant difference between the illiteracy level at Rocinha (7 %) and the 1 % at the Lagoa (a middle class neighborhood in Rio that borders Rocinha). *Note*: More than 3,500 people at Rocinha are illiterate.

Map of Illiteracy Among 15 year olds and older[570]
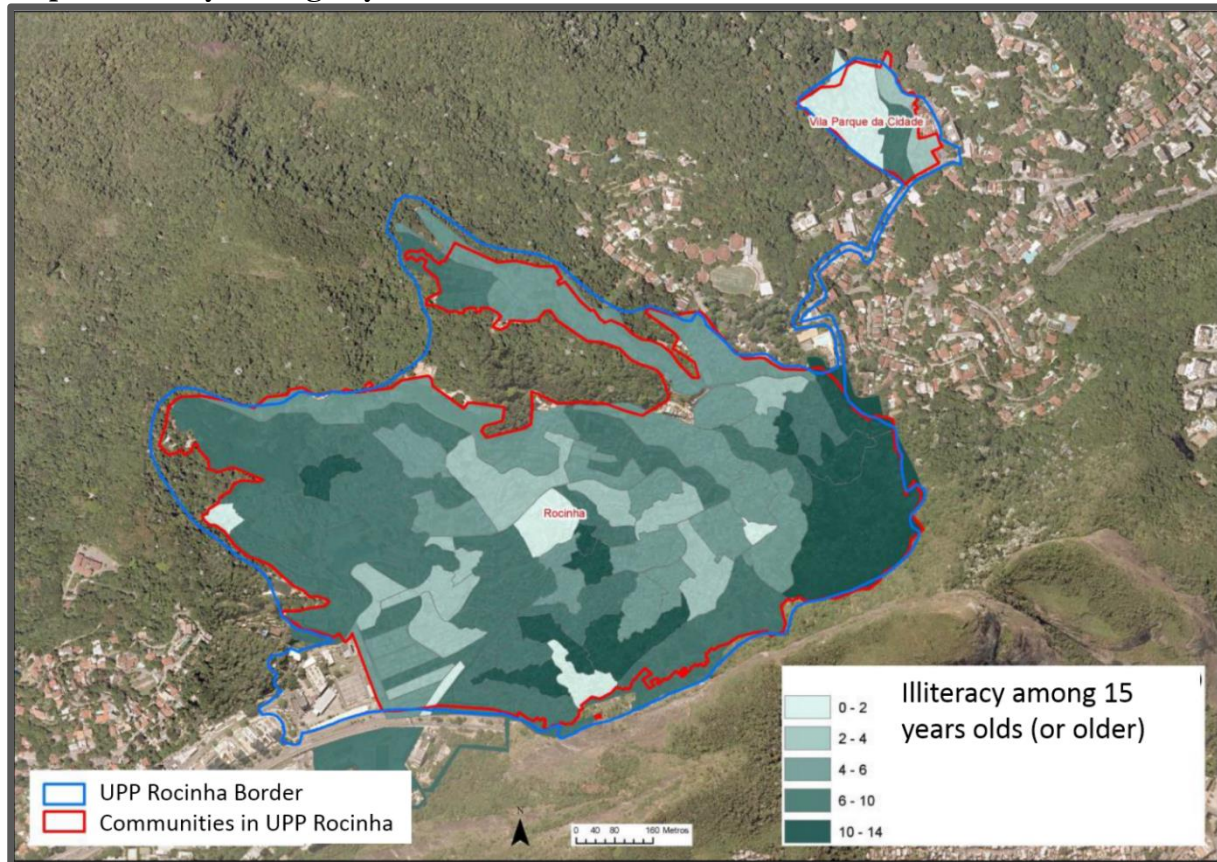
(Source: UPPsocial.org)

Social Networks

Without access to government services, and lacking a strong safety net to help them recover from the uncertainties of life, family members, close friends, and religious networks are fundamental elements mutual support networks for *favela* residents, and indicates a strong link between a *favela*'s social structure and economy.[571]

The importance of the safety net established by families is evidenced by household units in the *favelas*. Sometimes several generations of one family live under the same roof, a situation that is not seen in the formal city, where family units are smaller. Within a family, older generations will also provide financial support to younger generations because they have more difficulties finding jobs.

Religious networks provide a great source of support to *favela* residents as well. For example, evangelical church networks facilitate the exchange of money, food, utensils, information, and job recommendations.[572]

Social Change

As with many other aspects of life in the *favelas*, the social structure of these communities, especially the interactions *favela* residents have with one another, is significantly impacted by drug traffickers. A

rich community life marked the *favelas*, prior to the arrival of drug gangs, with social organizations, friendship networks, and organized community activities.[573] The vibrancy of community life in the *favelas* has since declined significantly, with *favela* residents feeling a diminished sense of unity.[574]

As an expert noted, "the fear of getting caught in the crossfire or on the wrong side of a friendship in a drug war has resulted in people going out less and keeping to themselves more. Every measure of community unity, trust, socializing, and participation has declined dramatically."**[575]**

Status

In communities now dominated by drug gangs, a person's status in the *favela* and ability to navigate the drug trafficking world is determined by the level of respect he or she has. Older individuals and those who are perceived as productive members of the community are more respected than those who are regarded as lazy or troublesome. For example, hard-working individuals, heads of families, and the elderly are more respected by the community than those who become involved with drugs, alcohol, and prostitution.[576]

This is clearly seen when someone gets punished by the drug gangs' justice system. As noted by an expert, "Residents express a high degree of anger when someone from a respected category is injured in conflicts, whereas they express a smaller amount of concern when someone from a less respected category is hurt."[577] As a result, in retribution, traffickers are more likely to kill someone from a less respected group than someone who has good connections, given that the execution of the former will have less political ramifications than that of the latter.[578]

Race

Favelas are racially diverse, containing a mixture of white, mulatto, and black residents.[579] However, the racial mix of the *favelas* does not reflect that of the city as a whole, and blacks tend to be disproportionately represented in the *favelas*.[580] Nonetheless, it should be noted that because of their racial diversity, *favelas* are not necessarily racial ghettos.[581]

According to the 2010 census 51 % of Brazilians considered themselves black or brown.[582] However, more than half the people in Rio de Janeiro's *favelas* (slums) are black and the comparable figure in the city's richer districts is just 7 %.[583] Many Brazilians believe that blacks are poor only because they are at the bottom of the social pyramid, and because society is stratified by class, not race. The reality is that the income of whites is more than double that of black or brown Brazilians, according to IPEA, a government-supported public policy "think tank."[584] IPEA finds that blacks are relatively disadvantaged in their level of education, access to health, and other services.[585]

CUFA - There is an organization self-designated "especially for blacks" from the slums that has been gaining momentum since 1999. The Central Union of the Slums, or *Central Única das Favelas* (CUFA) sponsors for social, cultural, and sporting events.[586] CUFA's founders are renowned rappers, hip hop artists, and social activists.[587] CUFAs also promote social projects, educational projects, and workshops in break dancing, graffiti art, street basketball, skateboarding, the culinary arts, and more.[588]

Identity

The identity of *favela* residents is shaped and reinforced, not by blood ties, but by their socioeconomic condition, and by how the formal city regards and treats them. This sense of exclusion, which accentuates the physical boundaries that separate the *favela* from the asphalt, creates a sense of identity for *favela* residents, who see themselves as marginalized by a closed class system that stigmatizes poverty.[589]

This identity has become more pronounced recently, particularly through music. Songwriters from the *favelas* have embraced the term *favelado*, a derogatory and insulting term for a person who lives in the *favela*, and have adopted it for themselves.[590] The term is now used proudly by some residents when referring to themselves and their community as a statement of defiance and pride of origin.[591] This is evidenced by several songs that highlight the *favela* as a proud source of identity.

Recommended Reading:

To learn more about the identity and culture of the youth in the slums in Rio:

Underground Sociabilities – Identity, Culture and Resistance in Rio de Janeiro's Favelas (Paris, France: UNESCO, 2013). Available at: http://www.upprj.com/upl oad/estudo_publicacao/Un derground_sociabilities.pdf

The Role of Music and Dance in Identity - Samba

Samba is Brazilian dance music, indigenous to Brazil that blends African rhythms that have become the iconic sound of Brazil's carnival.[592] The Carnival in Rio includes performances of samba schools and groups who perform in Carnival parades that originate in neighborhoods across Rio, including Rocinha.

Each samba school embodies the identity of each community or particular *favela*, and brings a sense of community and belonging. Samba schools have a huge impact on their neighborhoods and permeate the life in *favelas* the same way that soccer does. They are also one of the best organized entities in the slums, with thousands of people joining rehearsals, samba nights, and carnival preparations. [593] In Rio, the devotion to samba schools is similar to the national passion for soccer teams.

Roberto DaMatta, a Brazilian anthropologist who teaches at the University of Notre Dame in South Bend, Indiana, says Carnival creates a private niche in space and time for the poor to redefine themselves and their society:[594]

"Carnival exists to create new faces that during the whole year have no place; it shows a society with an endless capacity to see itself in different ways. That's why Carnival belongs to the street, to the squares, to the night. It belongs to the outcasts."[595]

Rio's *Favelas* Funk Music

Funk music has become the biggest hit among the youth in the *favelas* in Rio since the 1980s. It can be described as an offspring of Miami bass, electro's distant cousin that later combined with disco, resulting in one name *baile funk* or funk parties.[596] Considered a culture on its own, it combines its codes and dance styles with clothing fads and slangs of the *favelas*.[597] With a heavy component of obscenities, its lyrics are a

distinct feature imprinted by the *favelas* youth, giving detailed ghetto realities such as the struggles, violence, and sexuality.[598]

The funk partygoers, called *Funkeiros* got a negative connotation after a 1992 riot near Arpoador Beach in Rio, when images of black youth running and fighting were broadcast throughout the country.[599] After this episode, *baile funk* was criminalized everywhere else in Rio except the trafficker-dominated *favelas*.[600] It soon became the new voice of the slums, competing with samba. Some of the funk became entangled with crime, generating a funk sub-genre called the *proibidão* (very prohibited), celebrating drug dealers, crime organizations, and issues of dissatisfaction of the poor people in the slums.[601]

> "[Our goal is] to prevent people from showing off their weapons and to stop the racket of 'funk' dance parties full of armed traffickers," said Ranufo Brandão, a commander of the Duque de Caxias Military Police Battalion in August 7, 2013, for an interview with *Infosurhoy*.[602]

Rio's funk dance has metamorphosed into a cultural phenomenon, many times demonized by the media and blamed for the violent episodes that happened in the *bailes*.[603] However, with time, this cultural phenomenon, has made its way to social media, and it has been used to achieve political goals. For example, the massive popular demonstrations in Rio in June 2013, when funk artists urged their tens of thousands of followers to take to the streets and to support the cause, as MC Anita's lyrics say "It's time for change, come join us / You don't need to break anything, just fight for what's right."[604]

The artist M.I.A. brought Brazilian funk to international mainstream (Source: Wikipedia.org)

Today, funk's importance as a cultural phenomenon can be felt even in children's educational outreach projects such as the Library Bus Project, to promote reading in Rio's *favelas*.[605]

> **Library Bus Project** in Rio's slums:[606] Tahis Lugão, the project supervisor, reinforces the importance of speaking the language of young readers to be able to build a relationship between them and reading. In order to attract young readers, Lugão sends messages to young readers through parodies of well-known funk songs. "We take a famous funk song and create our version, promoting reading in general or telling a story." The funk songs "The Reading Crew" and "The Ribbon Crew," both created by Lugão, became hits at the project. "Many readers returned with friends," she added. "The other day, a young reader from the Complexo do Alemão neighborhood said he wanted to live inside the bus 'because it's cool.'"

As Rio's *favelas* are being pacified, a new culture is starting to emerge, one that wants to break from the glorification of violence, sex, and drug dealers, to a new genre, favoring rap lyrics about the struggle of Rio's poor. "*Passinho,*" or literally, "Little Steps," is a hybrid of samba, *frevo*, and American break dancing, and it is the new culture shaper emerging in Rio's *favelas*.[607]

Identity – The Role of Soccer

Soccer is Brazil's national sport and has dominated all segments of society for generations, making its imprint in the identity of the nation as a whole and especially in the young population of the

favelas. Many of the best Brazilian soccer players grew up playing and watching soccer in and around Rio's *favelas*. Ronaldo, Romario, and Jairzinho for instance, were some of Brazil's greatest soccer players, and were born and raised in Rio's *favelas*.[608]

Soccer has also become one of the best ways to channel youth living in the *favelas* away from criminality, this offering them a positive outlet. Many civil society organizations and NGOs provide social programs that include soccer and other sports. With the intention of strengthening ties among young people from Rio's *favelas*, the Central Union of the Slums, or *Central Única das Favelas* (CUFA) sponsors "The *Favela* Cup," which brings together 1,500 young people from 73 favelas.[609] According to one of CUFA's founders, rapper Nega Gizza, "some of the *favelas* where these young people live are dominated by rival gangs, With the *Favela Cup*, we're removing the distance that separates them."[610]

Young favela youth sing the Brazilian National Anthem at the Favela Cup, held at *Madureira Futebol Clube*, in the northern outskirts of Rio (Source: Renzo Gostoli / Austral Photo for infosurhoy.com)

Soccer helps kids stay in school and prevent crime involvement:

Penha is a *favela* that the government of Rio has retaken and installed a UPP, which now patrols the narrow streets. Today, though drugs still exist on a lower level, the presence of weapons in the community has significantly decreased.[611] Van Buuren, a Dutch psychiatrist who came to Brazil in 1987, created a social project NGO, *Instituto Brasileiro de Inovação em Saúde Social* (IBISS) that helps children in the slums of Rio by utilizing their interest in soccer, to keep them in school and out of crime.[612] One of the rules of his program is that only children who attend school can play soccer in the *favela*. His account on his deeds can be summarized as follows:

"When IBISS began, around 40 percent of the children went to classes; now that figure is at 98 percent. In this *favela* where we are now, there is no family that has not lost one of their own to a bullet. Many of the kids are still traumatized but we are using to football to help them cope. They are becoming educated, getting jobs - that gives you the strength to go on, but there is still work to do. Many people don't believe it is possible to persuade ex-drugs bosses and ex-drugs soldiers to stay out of crime. We are showing it is, but some won't be persuaded."[613]

Suggested Videos:

To see videos about the **importance of soccer** in Rio's slums:

Phillippe Houdard, "Future Kings of Brazilian Soccer – Inside Mangueira Favela," *Developing Minds Foundation*. Available at: https://www.youtube.com/watch?v=O6GBRe9_RAU

Suggested Movies:

"Favela Rising" is a 2005 award-winning documentary film.

Trailer Available at: http://www.favelarising.com/

Full movie available at: http://www.imdb.com/title/tt0455949/

Recommended Reading:

To learn more about the **role of soccer** in Rio's slums:

Basil Seif, "The Favela," *World Cup 2014 -Soccer Politics Blog* (Duke University). Available at: http://sites.duke.edu/wcwp/world-cup-2014/politics-in-brazil/the-favela/

Daniela Oliveira, "Rio de Janeiro slums united through soccer," *Infosurhoy* (January 31, 2013). Available at: http://infosurhoy.com/en_GB/articles/saii/features/sports/2013/01/31/feature-02

Ben Smith, "Confederations Cup: Rio de Janeiro slums offered rebirth," *BBS Sport Football* (June 21, 2013). Available at: http://www.bbc.com/sport/0/football/22951694

Nelza Oliveira, "Rio de Janeiro sees drop in youth involved in narco-trafficking," *Inforsurhoy* (July 27, 2011). Available at: http://infosurhoy.com/en_GB/articles/saii/features/main/2011/07/27/feature-01

Political Structure of Rio's *Favelas*

The way that individuals within a social structure distribute and exercise power and leadership defines the political structure of a culture. The fourth dimension of this case study examines the political structure and leadership of the *favelas*.

Who in the *favelas* has the power and authority? Who are the formal and informal leaders? How do they look at laws versus cultural norms and practices?

This dimension will also examine how the *favela's* residents have mobilized together to address their common problems.

Contentious Relationship with the State

Favela residents have always had a contentious relationship with state authority. Historically, *favelas* were seen as a "cancer" growing in the "healthy urban territory."[614] Residents were considered squatters who posed a threat to the city, and *favela* residents were the victims of systematic and repeated removals, beginning in the city's affluent South Zone, where land values were the highest.[615]

After 1975, the government's policy switched to urbanizing the *favelas* and better integrating them into the city.[616] However, these policies were often discontinued, and *favela* residents were never free from the threat of eviction, leading to frustration with and distrust of the state.

Corrupt Politicians Conniving with Crime and the forming of the Drug Gangs

Rio de Janeiro's State governor Leonel Brizola's corrupt practices transformed the slums into open territory for organized crime, and coincided with Brazil becoming an alternative distribution route for illegal drugs, after the United States' war on drugs essentially closed down Colombia's borders beginning in the 1980s.[617] Rio de Janeiro, a port city, thus became the main South American distribution center for cocaine and marijuana to Europe and the United States.[618]

Both of these developments allowed organized crime to establish a firm presence in the *favelas* and maintain control over them, becoming increasingly well-armed and representing a de facto threat to the state's hegemony.

Leonel Brizola - Rio de Janeiro's State governor's corrupt practices contributed to the forming of the gang's in Rio's *Favelas*.[619] Mayor Leonel Brizola, one of the most controversial political figures in Brazil, was Rio de Janeiro's State governor in 1983-1986, and again in 1991-1994.[620] He was also vice-

president of the Socialist International, and had formerly supported the ousted Communist-sympathizer, President Goulart, in 1964 - who also happened to be his brother-in law.[621] Officially identified as a "national security threat" by the military government, he spent 15 years in exile.[622] After the promulgation of the Amnesty law, that allowed political exiles to come back to Brazil, Brizola returned to the country.[623]

Upon his return, Brizola founded a new labor party and ran for Governor in 1982. His campaign platform included the promise to the slums of Rio of a "New Deal:" if elected he said he would implement "social changes and investment in the poor."[624] Claiming that he wouldn't use the same tools of "repression, conflict and disrespect used by former the military government," Brizola promised the illegal gambling mafia that ran the slums at the time (the *bicheiros*) that, if elected, he would order the state police to be soft on those areas. In 1985, he forbade the police to go up into the slums.[625] Governor Brizola in other words "sold" the city to the organized crime and *bicheiros*,[626] and, once established, the crime and gambling were sustained by poverty and corruption.

Unprecedented levels of crime and violence in Rio de Janeiro in the 1980s led to a policy reversal in the 1990s, favoring greater police activity in these communities. As a result, the Brazilian Military Police began to enter these communities in droves to kill drug lords and confiscate drugs and weapons, leading to many innocent casualties.[627] These developments had a disastrous effect on the livelihoods of *favela* residents; the *favelas* literally became war zones. As one expert put it, "The *favelas*…have become the frontlines of Brazil's drug wars."[628] Drug gangs fight bitter turf wars for the control of the *favelas*, and against police incursions; innocent *favela* residents were frequently caught in the crossfire. Recent studies have found that homicide rates in *favelas* dominated by the drug gangs in Rio de Janeiro's North Zone are 19 times higher than in the city's affluent neighborhoods.[629]

Drug Factions

Rio de Janeiro's three most powerful drug gangs, known as factions (*facções*), include the *Comando Vermelho* (Red Command), *Amigos dos Amigos* (Friends of Friends), and *Terceiro Comando*. These last two gangs are splinter groups from the *Comando Vermelho*.

THROUGH THE LENS OF CHANGE: Contact with other groups can be a major source of Change:

The first organized faction in Brazil, the *Comando Vermelho,* was created in the late 1970s. The military government decided to consolidate political inmates and common criminals in the same prison. The common criminals typically came from the *favelas*, and they were combined with the political inmates at the Cândido Mendes Prison on the island of Ilha Grande, in the state of Rio de Janeiro.[630] In the process, the political inmates ended up teaching the common criminals about guerrilla tactics and the concept of organization. This eventually led to the creation of the *Comando Vermelho*, and several other well-organized drug gangs.[631]

These factions have formed networks comprised of corrupt civic leaders, politicians, and police, thereby becoming a powerful "parallel state."[632] Within the *favelas*, factions follow a rigid hierarchy,

with "soldiers" tasked to defend their territory, and labor divisions for the packaging and sale of drugs.[633] Between gangs, the structure is more of a "horizontal network of mutual protection," with independent drug dealers becoming affiliated with a given faction, and providing mutual support when needed.[634]

It should be noted that most of the drug dealers belonging to drug gangs are not native to the *favelas* in which they operate, but are transferred from different *favela* communities.[635] Thus, they are not seen by *favela* residents as members of their communities, and only a small fraction of *favela* residents are involved with the drug gangs.[636]

Favelas are ruled by one of Rio's three organized crime syndicates – *Comando Vermelho* (Red Command), *Terceiro Comando Puro* (Pure Third Command), and *Amigos dos Amigos* (Friends of Friends). Since the police often want little to do with the *favelas*, preferring instead to pretend they simply don't exist, crime syndicates have moved into the *favelas,* offering protection in return for a place to deal cocaine and marijuana.

Rio de Janeiro (2010) - Security forces occupy the Complexo do Alemão after traffickers were offered the chance to surrender to the police.[637] The police led the operation, with the support of the Armed Forces, including the use of military tanks, helicopters, and other vehicles.[638] Brazil's flag was hoisted on the highest part of the hill as a mark of the police occupation.[639] Weapons, ammunition, and drugs were seized at various locations. It is safe to say that whenever a *favela* resident typically deals with the state, it is usually through the police. The presence of police in the *favelas*, however, has had a disastrous effect on the lives of *favela* residents. For observers, the use of unwarranted lethal force by the Brazilian police stands out, even in Latin America, a part of the world where police brutality is common.[640] As an expert noted, "Community residents consider the police worse than the traffic [sic] because the police enter the *favelas* prepared to kill anything that moves and leave once they are finished."[641] The police use unwarranted lethal force against *favela* residents; some law enforcement officers are also involved in the drug trade.[642] Police involvement in drug trafficking is an understandingly attractive option, given the fact that the average pay for a police officer is about US$200 a month, and easily represents "an invitation to graft, corruption, and retribution."[643]

Some off-duty or retired police officers have formed armed militias. Purporting to protect *favela* residents from drug gangs, these militias end up controlling the lives of many *favela* residents; extorting them for "protection," and imposing stiff fees on normal aspects of their daily lives, such as the delivery of goods, and entering and exiting the *favelas*.[644] The militias are said to control over 100 favelas and have become a growing threat to these communities.[645] Militias reportedly bring in around US$200 million a year with their extortion of *favela* residents.[646]

Brazilian Security forces seizes Complexo do Alemão slums in Rio, in November 2010 (Source: Wikipedia, photo by *Agência Brasil*)

Leadership in the *Favelas*

Given the complex and contentious relationship between the *favelas* and the state, the leadership of these impoverished communities has assumed responsibility for their internal governance. As a result, these resident associations have become the most important political voices for *favela* residents.[647] These associations were formed out of the need to fight against evictions, lobby for basic urban services, and conduct other negotiations with the state. However, the arrival of drug traffickers caused some resident associations to lose their independence.[648]

Most resident associations are now controlled by the drug gangs that handpick resident association presidents. Whenever resident association presidents resist a takeover by a drug gang, they are either forced out or executed as an example for others. Replacement association presidents work to maintain good conditions for drug traffickers to operate, and serve as intermediaries between drug traffickers, residents, and state officials.[649] They are the "go-to" leaders in a *favela* for any decision relating to the community, from choosing the contractor for a new building project to deciding who is allowed to enter it.[650]

However, where drug gangs control resident associations, the ultimate decision-maker is the *dono do morro*, the local drug lord who "owns the hill." The *dono do morro* makes the final decision when it comes to enforcing local rules.[651] Drug traffickers earn a level of support from the residents by enforcing these rules, and by providing a minimum level of social services. These social services can include the delivery of illegally tapped water and electricity, providing financial assistance to individuals in need for funerals and transportation, and hosting large-scale festivities, such as the *bailes funk*.[652] This type of service is an example of reciprocity, and favors are exchanged for political loyalty.

> ***Bailes Funk*** are parties originally held in Rio's *favelas* that play funk, a style of music popular in Rio's *favelas* since the 1980s. [Read more about *Baile Funks* in chapter III - "Social Structure."]

> **THROUGH THE LENS OF RECIPROCITY: What happens if reciprocity fails?**
>
> During elections, the government of Rio has made attempts to improve the quality of life in the *favelas*. Unfortunately, when elected officials are finally in power, many of their campaign promises tend to be forgotten, and projects are not completed. The populist government of former President Lula, launched in late 2007, the Growth Acceleration Program (PAC). PAC was a $107 million urban renewal project that funded a variety of public works:[653] "These include a 144-apartment project painted in bright pastels and bordered by parks and playgrounds; a sports complex and public footbridge designed by the late Brazilian architect Oscar Niemeyer; and a cultural center and library. But work has slowed or stopped on other projects, including an ecological park at the top of the *favela*, a market and a day care center. Some residents believe that the rush of construction was intended primarily to solidify Rocinha's support for the 2010 re-election bid of Sergio Cabral, governor of the state of Rio de Janeiro, who won handily. In November 2011, the state government pledged another $29 million in PAC money for development of the *favela,* but activists say they have seen none of the promised development has been delivered: "The climate here is disillusionment."[654]

Protest included representatives from *favelas* and community organizations across Rio, mobilizing in unity with teachers and bringing attention to their own struggles within the broader city context.[658]

Slum residents join the teachers' strike (Source: Rioonwatch.org)

Recent Changes: Political Change

Despite the many years of violence and exclusion, life is beginning to change for some *favela* residents. These changes are being made by policies implemented recently by the government of Rio de Janeiro to bring the state back into the *favelas*, regain the trust and cooperation of these communities, and rid them of the presence of weapons and drug gangs. The Permanent Police Pacification Units (UPP) seek to disarm drug traffickers, and enable the social, economic, and political integration of *favelas* into the city with the cooperation of social agencies and the private sector.[659]

In the process, the government is trying to change the *favela* residents' perception of authority; from one based on a deep, historical mistrust, to greater cooperation and interaction based on a newfound level of trust. The government of Rio has already established 38 UPPs, serving over 226
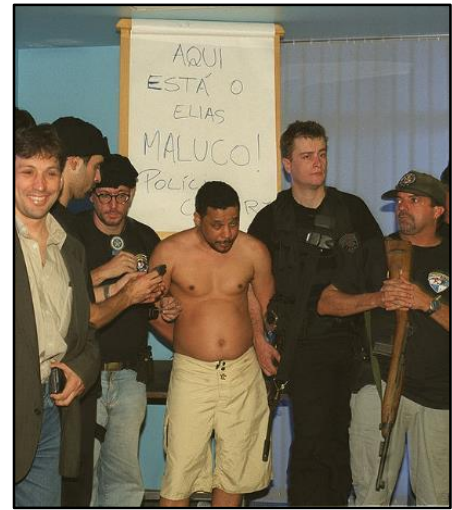
communities populated by more than 1.5 million people, with 9,543 UPP police officers dedicated to this mission.[660] The city government refers to this policy as Brazil's most important security initiative in the last two decades.

This new policy has produced some positive results. Without the presence of the drug gangs, residents can now move around the

Police arrest drug dealers (Source: Wikipedia, photo by Andréa Farias, *Agência O Dia*)

"pacified" *favelas* much more freely, and have better access to public services and social programs.[661] Since it was once inconceivable for most people from outside of the *favelas* to enter them, unless they were buying drugs or had permission, several pacified *favelas* have now become tourist attractions.[662] Additionally, the UPPs are seen as an attempt to bring peace to the *favelas*, and reform a violent and corrupt police force. Toward that end, many UPP police officers must now undergo separate, specialized training for duty in the *favelas*.

However, critics argue that the main goal of the new policy was to prepare Rio de Janeiro for two high-profile international events that the city was planning to host: the July 2014 World Cup and the 2016 Summer Olympics. They point to the "Olympic belt" of *favelas* pacified around the future location of the games as evidence of the government's priorities.[663]

Residents worry about what will happen after these high-profile events end: will the police remain or will this be an abandoned effort like some policies that preceded it?[664] Additionally, the perceptions that *favela* many resident of the UPPs is tainted by a history of abusive treatment by the police; distrust in the police and the state is still ingrained in these communities.[665]

Rio de Janeiro - Army supports the occupation of *Complexo do Alemão* (Source: Wikipedia, photo by *Agência Brasil*)

Other critics argue that the state lacks the capacity to inject sufficient law enforcement forces to all areas, and that by conducting clearing operations in some slums it is simply moving criminality to other areas.[666] Such displacement is taking place in Rio de Janeiro under the current UPP policy, and violent criminal

gangs and other criminal enterprise are now relocating from the *favelas* near the city center to communities on the southern outskirts of the city.[667]

**THROUGH THE LENS OF HOLISM: So what is the right approach?**

Although the UPPs are designed to incorporate educational, cultural, sporting, social and professional inclusion projects, failure to actually deliver infrastructure projects and other social services might result in disillusionment. One difficult problem to resolve is a negative side to the implementation of the UPPs in Rio: as a result of conducting law enforcement operations in one specific area at a time, the state is actually fomenting the spread the criminality to other areas. Additionally, such operations also create the challenge of sustaining the same level of law enforcement: after the heavily armed police forces leave the retaken territory, the regular police may not be able to hold the territory.[668]

"The effects of insecurity in the outskirts, from extortion driving legal enterprises out of business, may leak back into the city center, undermining security achievements in the prioritized zones. Thus the selection of what problematic urban areas will be selected for law enforcement action needs to be guided by a strong focus on the sustainability of the security to be provided in those spaces, rather than, for example, on the basis of the intensity of violence in an area or its electoral significance."[669]

THROUGH THE LENS OF RECIPROCITY:

With the recent UPPs program adopted by Rio de Janeiro government, reciprocity could be starting to develop between the *favela* residents and the state, showing that a once contentious relationship has the potential to become collaborative, thus helping to ensure greater peace and security where violence and drugs once dominated.

Map of the location of the UPPs in Rio de Janeiro

Location of the UPPs
No. 22- Rocinha
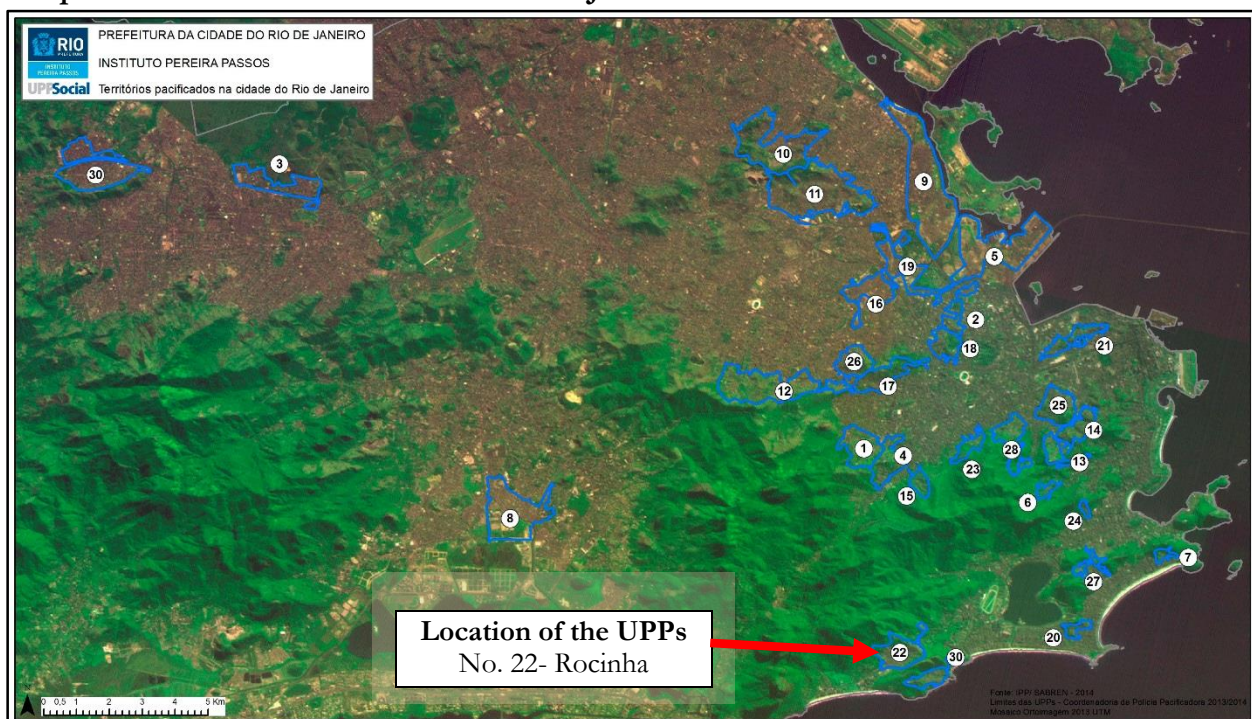
Source: UPPsocial.org

UUPs:
Number of Pacified Territories (UPPs): 37
Number of Communities: 193
Population located in UPPs areas: 581,929

Belief Systems of Rio's *Favelas*

A "belief" is a certainty about how the world works or should work. Beliefs help to determine how people see the world, and how they act in response to what they perceive. All of the other dimensions of culture ultimately rest on people's beliefs about how people should respond to their environments, how goods and services should be exchanged, how people should be connected to one another, and who should have power over whom.

Religion

Favelas are religiously diverse, with the presence of Roman Catholic, Pentecostal, and Evangelical Protestant churches, and *Candomblé* centers.[670] As has happened elsewhere in Brazil, Catholicism in the *favelas* has declined, while Pentecostal churches have experienced a surge of support. This increased interest in evangelicalism is largely a result of people abandoning Catholicism or have

simply giving up on a religious faith altogether.[671] For many *favela* residents, affiliation with evangelical churches gives them a sense of belonging to a protective network, and identification with a moral lifestyle that elevates them from the stigmatized image associated with the *favelas*.[672]

Candomblé is defined as: "an African-Brazilian religion that has around two million followers. It is a syncretic religion, meaning that it is a combination of various beliefs. At the core of the religion are the traditional African beliefs of Yoruba, Fon, and Bantu. Candomblé also has elements of Christianity, particularly of Catholicism. Candomblé means "dance in honor of the gods." Accordingly, dance and music play important roles in this religion. At the center of Candomblé is God (Oludumaré) and Deities (Orixás) who serve Oludumaré. Candomblé does not have any holy scriptures."[673]

Suspicion and mistrust against the UPPs - blatant refusal to attribute any blame to the drug dealer's pervasive nature of their criminal activities to the community can be observed by some spiritual leaders in Rocinha.[674] *Candomblé's* Priest of *Xangô,* Father Almir, expresses his doubts about the UPP "Operation Peace Shock" in the days after the operation in November, 2011:

"They want our land, that's why they are removing the poor. We applaud the police for bringing discipline, but I have no complaints about the drug dealers so I can't say if they are good or bad. I never relied on criminals or on the police. I did not depend on them. I hope when the police arrive they don't do what they are doing in the other slums: taking stuff from the poor. I hope it is good for the poor because it is already good for the rich."[675]

With the spread of evangelical churches, a new phenomenon is occurring in many *favelas* in Rio: drug dealers are being converted to evangelical churches. Drug dealers, even the ones who have experienced a religious conversion, continue to assist *favelas'* residents with resources and services not provided by the state. However, these newly spiritually-enlightened drug dealers are using their influence to threaten residents in the *favela* that have gravitated to non-Christian religions, especially adepts of Candomblé.[676]

"God's Warriors" in the slums of Rio *(English-version excerpt translated from O Globo story).*[677] Fernandinho Guarabu, a renowned drug dealer in the Dendê slum in the Ilha do Governador region, display tattoos with Jesus' name and Bible verses. His newfound spirituality has also motivated him to spread the word by "cleaning up" **his** *favela* from practices and adepts of Candomblé and other Afro-religions. Guarabu started attending God's Assembly of Mount Sinai's Ministry in 2006, where he experienced his religious conversion. After conversion, whomever he caught wearing all-white (the traditional *Candomblé's* dressing), was "invited to leave." He has shut down over ten *Terreiros* (centers of Candomblé practice). The situation is similar to one that occurred in the Serrinha slum, where organized criminals have painted over wall murals that once depicted images of *Candomblé's* deities, and replaced the murals graffiti that reads "Only Jesus Saves." A former resident of Complexo do Lins slum reported that in 2005, when she arrived at the slum with her head shaved after her *Candomblé's* initiation, people avert their faces. One day someone walked up to her and said that she was no longer permitted to walk around the slum with those "clothes of the devil." She said the threats continued to the point where she was forbidden her to hang her white clothes out to dry. This convinced her it was time to leave the slum. Similar stories are reported from the Parque Colúmbia slum in the region of Pavuna, in the north outskirts of Rio.

According to Rio's Band News, one of many *Candomblé's* association in Rio slums, that has 162 Candomblé and Umbanda *Terreiros,* have been shut down by organized criminals.[678] In order to address this situation, Rio's prosecutor's office has joined the efforts of the Religious Intolerance Combat Commission, known by its Portuguese acronym CCIR. CCIR was founded to address the growing issue of religious intolerance. For the past seven years, CCIR has promoted social awareness campaigns and proposed legislation to promote religious tolerance.[679] CCIR is composed of leaderships of the main religious in Brazil: Umbanda, Spiritists, Jews, Muslims, Malês, Baha'i's, evangelicals, Hare Krishnas, Buddhists, gypsies, Saint Daime followers, atheists, and agnostics. Rio de Janeiro Justice Department and the Civilian Police are also members.

Informal Rules

Each *favela* has its own set of informal rules and residents are expected to follow them, or be punished. These rules include not stealing from other residents, raping or committing any form of extreme violence against women and children, and creating any public disorder by heavy drinking or fighting. These informal rules are intended to minimize police involvement in the community.[680] Drug traffickers are responsible for enforcing these local rules, and for resolving many neighborly disputes.

Current Changes in the Belief System of Rio's Pacified Slums

As previously discussed in the theory section of this chapter, as the environment, behavior, and social structure of a culture changes, cultural beliefs will also shift to support the new reality. Many *favelas* in Rio are currently undergoing significant cultural change with the arrival of the UPPs. First, as drug traffickers are pushed out by the UPPs, the ties of reciprocity between organized criminals and the community are being replaced by new ties with the government and the rule of law. As a result, the police are now maintaining order, and state agencies are providing social and public services.

Group dance and sing *Jongo*, during the 6th Walk for Religious Tolerance promoted by CCIR – Copacabana, Rio de Janeiro (Source: *Agência Brasil*))

Second, the public's rapid embrace of evangelicalism (frequently accompanied by criminally-backed acts of intolerance targeted at non-Christian religions) is now being countered by organizations, such as the CCIR, that aim to combat religious intolerance. Religious intolerance has never been part of the Brazilian society, this new-found intolerance has been a recent phenomenon brought by the drug traffickers.

Third, with changes to the social structure in the Pacified *favelas* (where drug lords no longer rule), there has been a rediscovery of moral values that were once an integral part of *favelas*. This belief system -- which at one time been supplanted by the obscenity- and violence-laced "*Proibidão*" funk music – is now celebrated by "clean" and "honest" *Passinho* dance music.

Fourth, relations with the formal economic system are also changed from an informal to semi-formal to formal relations. The government delivers and regulates public services such as electricity, water and sewage. These were services that were previously unavailable or informally handled by the community or individuals.

Fifth, the new political structure in the *favela* is no longer in the hands of criminals. With the shift in power, the community is now free to express its needs without fear reprisal from the drug lords. People have also begun to unite, mobilize and demand even more changes. In Rio's slums, these changes gather exponential momentum due to the overwhelming young age of most of the population. The slums are composed mostly of young people, and therefore their belief system is more pliable to the new circumstances.

Sixth, the youth's current icons and symbols are also helping mold a cultural change. The previous combination of lack of formal education, extreme need and absence of true opportunities, limited significantly social mobility for the *favelas* youth. Their main icons and heroes, those individuals that had escaped a life of poverty were the star soccer players and funk music rappers. Assistance from social workers, from NGOs, and from their own grassroots organizations continue to utilize these icons and symbols to attract the *favelas*' youth to stir away from criminality. The difference is that the *favelas*' youth are now also involved in other educational and vocational activities as well, which will continue to contribute to a cultural change.

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Conclusion

By identifying links to the Five Dimensions of Operational Culture in the *favelas* in Rio de Janeiro, this case study also sought to highlight the concepts of identity, holism, change, variation, mobilization, and reciprocity in some of these unique South American communities. Reciprocity is evident in these communities in the form of favors exchanged and assistance offered by family members and friends within the *favela* communities, forming a cohesive social network. Reciprocity is also clear in some of the services provided by the drug gangs in exchange for the *favela* residents' loyalty.

This case study has shown that the experience of *favela* residents with socioeconomic exclusion, dominant drug gangs, and police brutality has served to form a cohesive group that shares a common identity. Forged by their adaptation to harsh and unwelcoming conditions in the urban cities of Brazil, *favelas* are one of the many close-knit communities of South America's marginalized urban poor. Their daily struggles with poverty, fear, violence, and exclusion illustrate the great urban divide caused by a closed class system that limits economic opportunities and personal advancement for the poor; this is exacerbated by the pernicious effect of drugs and organized crime on poor communities.

Recently, there is evidence of the *favela* identity becoming stronger, with the proud use of the usually offensive term f*avelado* ("the one from the *favela*," a pejorative term) to describe their identity. Despite

the recent substantial political and economic changes impacting the lives of *favela* residents today, the very existence of Rio de Janeiro's numerous *favelas* remains a daily reminder of the many persistent challenging issues that continue to impact the lives of millions of Brazilian urban dwellers.

You might have noticed that the case study does not include all, or even many, of the concepts discussed in the Operational Culture General document. This is only natural; a comprehensive body of literature devoted to the study of a single culture is rare. In fact, Marines are frequently called upon to operate in areas where current information on local culture is scarce. What the OCG and the chapters in this document do is to help Marines learn about their assigned region, and acquire skills and concepts that will assist them in operating effectively in complex cross-cultural situations in any part of the globe where information is scarce or rapidly changing.

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