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**SOUTHERN ATLANTICISM**  
*GEOPOLITICS AND STRATEGY FOR THE  
OTHER HALF OF THE ATLANTIC RIM*

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THE GERMAN MARSHALL FUND OF THE UNITED STATES

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# SOUTHERN ATLANTICISM

*Geopolitics and strategy for the  
other half of the Atlantic Rim*

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Ian O. Lesser\*

The German Marshall Fund of the United States

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# 1 INTRODUCTION

For the last 50 years, at least, the center of gravity in transatlantic relations has been firmly rooted in the Northern Hemisphere. This reality is unlikely to be overturned anytime soon. But the next decade is likely to bring a significant rebalancing of relations around and within the Atlantic space, with the South Atlantic playing a larger role in political, economic, and security terms. This shift will be driven by the rise of Brazil and South Africa as global actors, as well as the growing role of West Africa as an energy provider. Environmental challenges emanating from the South Atlantic will also play a role. Countries on both sides of the Atlantic, and in both hemispheres, are likely to seek new geometries in their external relations, to enhance their geopolitical weight, and to diversify their commercial and strategic ties. In the process, Atlantic orientations will be rediscovered, reasserted, and reshaped. The result may be the rise of multiple Atlantic identities, some compatible and mutually reinforcing, some operating in isolation or in competition.

This paper explores transatlantic relations in a wider frame, and anticipates the rise of a more balanced and diverse set of partnerships around the Atlantic basin. What could be the drivers of a new and wider Atlanticism? Trends in the global south as a whole are part of the equation, alongside changing measures of national power and potential. New and powerful actors are emerging, and several of these will be found in the south Atlantic. At the same time, the foreign and security policy agenda is changing in functional terms. Some of the most prominent concerns, from energy security to the environment, from international crime to migration, will emanate from the south or be shaped by developments outside the north Atlantic. A wider, unified Atlantic system is one scenario for the future, but hardly the most likely one. This analysis surveys the evolving scene, explores alternative scenarios, and offers some implications for transatlantic strategy.

## 2 REDISCOVERING THE SOUTH ATLANTIC

*In many ways, the rebalancing of Atlantic geopolitics is less a new development than a rediscovery of historic patterns.*

In thinking through this prospective shift, the distinction between the transatlantic “north” and “south” does not conform to strict geographic definitions. The analysis must include the Southern Hemisphere and the high southern latitudes. But it must also take account of relations with Mexico and the Caribbean, and parts of North and West Africa well above the equator. The relevant distinction is more political than geographic. From the perspective of Brazil’s strategic interests, the relevant demarcation is probably not far off the equator.<sup>1</sup> Europeans and North Americans might put the line closer to the Tropic of Cancer or NATO’s original southern delimitation at the 23rd parallel. In geopolitical terms, the “south” is in the eye of the beholder.

In many ways, the rebalancing of Atlantic geopolitics is less a new development than a rediscovery of historic patterns. For centuries, the European engagement in the Atlantic world had significant southern as well as northern dimensions, and at points, this southern dimension was far more prominent in economic and strategic terms. From the 15th century through the end of the 17th, European engagement in the Caribbean and Latin America, and the progressive expansion of sea routes down the coast of Africa and on to the Indian Ocean, gave the South Atlantic a central place in the calculus of empire. The North Atlantic was, relatively speaking, a strategic backwater. So too, the first century of American presence on the international stage was shaped to a large extent by interests looking south in the Western Hemisphere, and toward southern Europe and the

Mediterranean.<sup>2</sup> Post-colonial Latin America has also had its regional success stories, contrasting with the established image of a rich north and poor south. In the first decades of the 20th century, Argentina was a highly developed country with a per capita income among the highest in the world.

Yet, without question, the past century in transatlantic relations has been characterized by the primacy of the northern basin. It has been shaped by the weight of cross investment between northern Europe and the United States, and the imperative of security cooperation and sea control across the North Atlantic, underscored by the experience of two world wars.<sup>3</sup> Today, despite the rise of the Pacific Rim economies, the Atlantic world retains a predominant position in trade and finance. Flows across the Atlantic account for \$2 trillion in cumulative foreign direct investment alone. The bulk of this activity is North-North, leaving much untapped integrative potential within and with the southern basin.<sup>4</sup> The Cold War strongly reinforced this North Atlantic axis. For almost 50 years, the key strategic prizes were to be found on the northern and central fronts, and the maritime approaches to these areas, and the key political relationships were arrayed along a line stretching from Bonn to Paris, London, and Washington. The northern dimension was paramount, and the southern periphery was marginalized. The non-aligned movement notwithstanding, the importance of actors in the “global south,” where they mattered at all, was largely derivative of priorities and competitions centered elsewhere.

<sup>1</sup> Brazilian Vice Admiral Mario Cesar Flores describes an imaginary strategic line from Trinidad and Tobago to Dakar at 15 degrees north latitude. Cited in Manuel Amante da Rosa, “O Atlantico Sul os Novos Desafios Mundiais,” in Manuel Franco, ed., *Portugal, Os Estados Unidos e a Africa Austral* (Lisbon: IPRI/Luso-American Foundation, 2006).

<sup>2</sup> The earliest American diplomatic missions were established in Morocco and Portugal, including the Azores.

<sup>3</sup> See Forrest Davis, *The Atlantic System* (London: Allen and Unwin 1943).

<sup>4</sup> This argument is developed at length by Anne-Marie Slaughter in “America’s Edge: Power in the Networked Century,” *Foreign Affairs*, Jan./Feb. 2009.

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The long, lapsed history of South Atlanticism has some relevance for the next stages in wider Atlantic relations. On the positive side, countries such as Portugal and Spain, peripheral to international affairs in recent decades, will have a comparative advantage in understanding and engaging partners such as Brazil and Argentina, and Morocco. The legacy also has a troubled side, of course. Few Brazilians or Angolans would wish to revisit the colonial experience of north-south relations in the Atlantic. Indeed, troubled histories may well be

among the leading impediments to a reconfigured and wider set of transatlantic relations. As actors outside the north Atlantic mainstream rethink their Atlantic identities, they may consciously seek to distance themselves from old and unequal relationships. Just as NATO continues to face substantial public diplomacy challenges in its outreach to the Arab and Muslim worlds, alliance efforts in many parts of the Atlantic south would face substantial ideological resistance among publics and some elites.

# 3 THE ATLANTIC AND THE GLOBAL SOUTH

*It is also likely much new interaction and cooperation in the wider Atlantic space will take place at the level of cities and regions, and not just between central governments and multinational institutions.*

Developments in the global south as a whole will have an influence on the character of relations around the Atlantic. Three trends are likely to have special significance. First, the south is where economic growth rates have been relatively high. The persistence of this trend will bolster the influence of emerging actors such as Brazil, Nigeria, and Angola, and produce new patterns of economic and political interaction. China and India are the obvious cases of sustained high-growth rates driving structural changes in global political economy. But important examples will also be found within the Atlantic space. The rapidly expanding role of China in West Africa and South America has been widely discussed. At the same time, the rising Atlantic actors are likely to acquire new stakes in the old Atlantic economies. Fueled by energy earnings, Angolan investors are already a visible presence in banking and real estate in Portugal, on the pattern of longstanding Brazilian investment in Portugal and elsewhere in Europe.

Over time, higher-growth rates might narrow the prosperity gap between Europe and North America, on the one hand, and the economies of leading Latin American and African countries on the other. At the national level, this can fuel calls for a more assertive international profile. It is also likely to expand the already substantial level of transatlantic interactions at the level of institutions, firms, and individuals. A more prosperous south will likely be a more globalized south. Without question, the developing countries of the “Global South” will be more populous and more heavily urbanized. Leading examples of these trends will be found in the south Atlantic, with mega cities such as São Paulo and Lagos leading the way. The strategic adjustments that may be required to meet these demographic challenges will reinforce the need for closer cooperation between north and south in the

Atlantic space.<sup>5</sup> Under these conditions, it is also likely much new interaction and cooperation in the wider Atlantic space will take place at the level of cities and regions, and not just between central governments and multinational institutions.

Second, dynamism across the Global South has already raised the potential for new alignments as a conscious alternative to the Euroatlantic order. This has long been part of the foreign policy discourse in India, South Africa, and Brazil (and, of course, China and Russia). Regional actors as diverse as Mexico and Turkey are attracted to the concept of alternative alignments and diversification, often expressed in the vocabulary of the South, *tier mondisme*, and an ideological attachment to non-alignment. Emerging actors in the Atlantic arena may find themselves torn between identity with the Global South, including China and India, their own regional ambitions, and the prospect of enhanced cooperation with Atlantic partners, north and south. These tensions are unlikely to be fully resolved, but wider questions of identity and affinity will play a role in shaping the future of relations with the old powers of the North Atlantic. To the extent that key international institutions, including the UN Security Council are reformed and expanded, this question will take on greater significance. If Brazil, South Africa, and India become members of the Security Council over the next decade, the temptation to assert a global, southern identity may be very strong. Whether this happens or not, the debate over the reform of global governance is likely to be played out, in large measure, in the south Atlantic, with South Africa, Brazil, and perhaps Nigeria as key advocates for change.

<sup>5</sup> For a discussion of these demographic changes and their geopolitical and geo-economic consequences, see Jack Goldstone, “The New Population Bomb: The Four Megatrends that Will change the World,” *Foreign Affairs*, Jan./Feb. 2010.

Third, some of the key social forces affecting the strategic environment are most pronounced in the south, that is, south of the Tropic of Cancer. Religion is an important part of the picture. Catholicism remains a potent social and political force in the Atlantic south. Islam is an expanding religion in Sub-Saharan Africa and Latin America, and a dynamic force in national and regional politics. In West Africa, the assertion of Islamic politics has become a leading issue in the stability and security of the region—and a source of American and European security concern. Across the south Atlantic space, newer evangelical sects are making significant inroads into the terrain of more traditional churches. These trends are influencing societies around the Atlantic in potentially profound ways. They are creating new ties on a north-south and transatlantic basis. Religion may be a declining presence in the public space in the Atlantic north; it is a dynamic element in the future of the Atlantic south.

Fourth, the Atlantic south holds some of the key tests for the evolution of economic and political models. Venezuela and Argentina have led the charge against the “Washington Consensus” and 1990s-era assumptions about the efficacy of economic and political reform. In a less dramatic but arguably more persuasive sense, Brazil offers another, reformist-populist model that holds the Washington Consensus at arms length. In key societies around the south Atlantic, including South Africa, populist politics have become a

powerful force shaping external as well as internal policies. The global economic crisis has cast all of this in sharper relief. There are now few places where the gospel of liberal economic reform is still wholeheartedly embraced. Yet the developmental challenges remain stark. For all its dynamism, Brazil is still plagued by striking income disparities. The scandalous failure to achieve a better distribution of wealth in the energy rich states of West Africa is well known. Less well-endowed countries in West Africa offer some of the toughest developmental challenges.

Democratization in the broadest sense has also been one of the defining trends on both sides of the Atlantic south, anchored by the transition from apartheid in South Africa, and the successful shift to civilian rule in Argentina and Brazil. To the extent that democracy promotion continues as an objective in transatlantic strategy, some of the key success stories—and key future tests—will be found in the Atlantic south. Yet the appetite of the Atlantic states of West Africa and South America for policy agendas made in the North is wearing thin, whether the American focus on counter-terrorism and democracy promotion, or Europe’s own brand of conditionality based on transparency and rule of law. By comparison, China appears as a relatively undemanding economic and political partner—at least for now. India and Malaysia, growing actors in the South Atlantic in their own right, especially in the energy sector, are similarly straightforward and less conditional partners.

*Religion may be a declining presence in the public space in the Atlantic north; it is a dynamic element in the future of the Atlantic south.*

# 4 RISING POWERS

*The large new finds along Brazil's long coastline will likely place the country among the leading world producers of oil and gas over the next decade.*

Brazil has often been portrayed as the perennial country of the future. Many analysts are now willing to bet that Brazil's moment has arrived. If recent GDP growth rates of around 5-6 percent are sustained, Brazil is set to become one of the world's five biggest economies by the middle of the century.<sup>6</sup> With a population of some 190 million, a growing middle class, and the gradual amelioration of traditionally striking income disparities, the country may finally be set for a more stable and ambitious course. Whether these achievements were made possible by the current government of Inacio Lula da Silva, or the result of reforms put in place by his predecessor, Fernando Henrique Cardoso, the last decade has marked a profound shift from the inflation-ridden boom and bust experience of the past. Positive developments abound, from the continued success of Embraer, a leading aerospace company, to the recent discovery of vast new offshore oil and gas reserves. The country's position as a leading agricultural producer has been reinforced by the rise in global demand for biofuels—a source of controversy in its own right.<sup>7</sup> Rio de Janeiro will host the summer Olympics in 2016; a symbolic achievement, perhaps, but one that will test the country's infrastructure and showcase Brazilian modernity. The rise of Brazil has the potential to transform the role of Latin America, and increase the weight of the South Atlantic in global affairs and transatlantic policy.

The energy dimension is especially noteworthy. The large new finds along Brazil's long coastline will likely place the country among the leading world producers of oil and gas over the next decade. This will be transformative from the point of view

of Brazil's internal development. It has already been transformative in terms of the country's self-confidence and international perceptions. These energy finds will also give the country a greater stake in relations with regional consumers in Latin America, with economic partners across the Atlantic in North and West Africa, and in the security of maritime routes for energy trade.

From the perspective of political and economic development, and as a participant in the global economy, Brazil is poised to consolidate its position as South America's leading power. Beyond the objective of regional leadership, a more interesting open question concerns the future direction of Brazil's overall external policy. For all of Brazil's traditional wariness toward the United States, it is possible that a more powerful and confident Brazil will seek to enhance its strategic relationship with Washington, alongside a closer commercial partnership with Europe via Mercosur. In this context, Brazil's past leadership in South Atlantic affairs may take on new meaning. It is a striking fact that the distance from Recife to West Africa is less than the distance from Recife to many points in the Brazilian hinterland. Beyond important cultural and historical ties, successive Brazilian leaderships have seen cooperation with African "neighbors," above all, South Africa, as a key dimension of the country's foreign policy, including investment and development initiatives.<sup>8</sup> Brazil has a longstanding series of diplomatic, security, and development dialogues with South Africa and the Lusophone countries of Africa. In recent years, ties to South Africa have been cast in a broader framework of trilateral relations with India, all leading poles in

<sup>6</sup> See "Brazil Takes Off," *The Economist*, Nov. 14-20, 2009.

<sup>7</sup> See Tim Searchinger, *Evaluating Biofuels: The Consequences of Using Land to Make Fuels*, Brussels Forum Paper Series (Washington, DC: The German Marshall Fund of the United States, Mar. 2009).

<sup>8</sup> Recent actions in this sphere include the Brazilian-funded development of ethanol plants in Burkino Faso, Mali, and Chad, and a pharmaceutical plant in Mozambique. "Africa-Brazil: Spreading Influence," *Africa Research Bulletin*, Jun. 16-Jul. 15, 2009.

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the Global South.<sup>9</sup> Almost certainly, a rising Brazil will acquire new options, and perhaps some more difficult choices, in its external policy. An Atlantic identity may offer one way of reconciling at least some of these competing identities and interests.

The South African case is arguably less about an economic than a political rise. At the core, this has been about the general consolidation of democracy and stability in post-apartheid South Africa. The example of Zimbabwe offers a salutary reminder of what could have happened if the country's power shift and the process of reconciliation had been handled differently. The persistence of ethnic tensions inside the country, exacerbated by migration from the region, alongside myriad threats to human security, underscore the scale of the challenge—and the accomplishment. South Africa's recent history and relative prosperity give the country considerable weight and prestige with African neighbors. Not surprisingly, Pretoria's external policy has focused heavily on consolidating and extending the country's position in regional affairs, through SADC (The South African Development Community) and other mechanisms.

As in Brazil, there is a strong South African interest in asserting a southern identity, alongside India, as an alternative to the established Western order and the commercially-driven activism of China. In geographic terms, this trilateralism is a comfortable option for a country with both Atlantic and Indian Ocean vocations, and strong cultural ties to both spaces. At the same time, a more confident South Africa will have economic and politico-security interests (e.g., maritime security) that may only be secured through closer cooperation with Washington and Brussels. Growing African wariness about the implications of a more pervasive Chinese role on the continent may play a role in the revival of Atlantic ties as a counterweight and a strategic hedge. It is also worth recalling that liberation movements in West and Southern Africa benefited extensively from the activism of a relatively minor Atlantic actor in the 1970's and 1980's—Cuba. For South Africa's modern political elites, and others in West Africa, the Atlantic connection is deep, diverse, and closely linked to the experience of political change. Translating this legacy into a modern pattern of wider Atlantic identity and cooperation is likely to prove challenging.

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<sup>9</sup> See Chris Alden and Marco Antonio Vieira, "The New Diplomacy of the South: South Africa, Brazil, India and Trilateralism," *Third World Quarterly*, Vol. 26, No. 7, 2005.

# 5 NEW GEOMETRIES

*The strategic environment in the south Atlantic is increasingly multi-polar, and the search for new geometries in external policy could be the order of the day for many countries.*

Other actors in the Atlantic space may also seek to enhance their prosperity and security, as well as their strategic weight, by reasserting their Atlantic identity and transatlantic connections. In some cases, this may be done as a complement or an alternative to other regional and cultural identities. There is some potential for this in Mexico, a country with longstanding ties in Europe and, of course, with the United States and Canada. This could parallel the Mexican emphasis on its Pacific Rim identity over the last decade. The countries of Francophone and Lusophone West Africa will face similar choices in balancing their ties to neighbors, traditional European partners, North America, and a rising Brazil—not to mention an ever more active China and India. The older, Atlantic vocations may acquire new value against a backdrop of changing economic conditions and diverse security challenges. The strategic environment in the south Atlantic is increasingly multi-polar, and the search for new geometries in external policy could be the order of the day for many countries.

Morocco is a leading example of this search for new geometries and the reassertion of multiple identities. Rabat has occupied a position of special prestige and legitimacy in the Muslim world, alongside its Arab, Berber, and Mediterranean identities. The country has historic ties to Europe, especially France, Spain, and Portugal, and has been among the leading American and EU partners in North Africa and the Middle East. Over the past few years, the Moroccan government and leading Moroccan institutions have moved to reassert the country's Atlantic identity. More precisely, Rabat has sought a wider Atlantic engagement that includes West African neighbors, Brazil, Europe, and North America. In economic terms, the strategy takes account of the fact that Brazil has become one of Morocco's leading export markets, principally for phosphates. As Brazil emerges as a significant energy producer, this is likely to further reinforce bilateral ties.

In political and security terms, Morocco has a stake in a diverse set of strategic partnerships to balance regional neighbors, manage transnational risks emanating from the south, and benefit from established Euroatlantic security structures. In more practical terms, Casablanca has become a leading transit point for air travel to and from Africa as a whole. The Tangier-Med container port can greatly facilitate transport between the Mediterranean and the Atlantic basin, north and south, especially if linked to the completion of the proposed trans-Maghreb highway. The intellectual and policy debate about the new Atlanticism, with a strong southern dimension, was highlighted at a major conference held at Skhirat on the Moroccan Atlantic coast in May 2009. The gathering was consciously tri-continental in design and participation, and is emblematic of a growing attention to identity, geography, and “variable geometries” in external policy among the medium powers of the Atlantic space.<sup>10</sup>

Mexico, too, will have choices to make regarding the external orientation of the country. For all the shortcomings of the North American Free Trade Agreement (NAFTA), North America remains a structural partner, and not an optional orientation for Mexico. Despite a host of very real social challenges, the Mexican economy has continued to grow at a significant pace, and with steady population growth, Mexico is likely to become a more important international actor in its own right over the next decades. In recent years, Mexico has devoted particular attention to political and economic partners in the Pacific. Interaction with the neighboring “state” of California has been a key facet of this strategy. But Mexico also has longstanding Atlantic connections and interests, including historic ties

<sup>10</sup> See “The Skhirat Plea,” issued on the occasion of the first Forum for an Atlantic Tri-Continental Initiative, Skhirat (Morocco), May 30, 2009.

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and contemporary commercial links to Spain. To the extent that Mexico becomes a more prominent player on the international scene, the country may acquire a stronger stake in its Atlantic identity and transatlantic strategies. Alongside Brazil, Argentina, and others with competing regional interests,

engagement in the Atlantic, will be encouraged to the extent that Euroatlantic institutions can offer a relevant and more balanced agenda. Answering the question of “what is in it for us” will be a core concern for wary, wider Atlantic partners.

# 6 THE NEW FUNCTIONAL AGENDA

Beyond questions of identity and geography, the emergence of a wider Atlanticism will be driven by a changing functional agenda, cross-cutting issues closely associated with developments in the other half of the Atlantic space. The last decades have seen a steady erosion of political, security, and economic issues neatly contained within traditional regional boundaries. It is less and less useful to discuss stability and security in narrow European, Middle Eastern, African, or Asian terms. Most of the key challenges are not just transnational but transregional in character. Many also cut across traditional internal and external policy lines. Migration and health are exemplars of issues with a strong “inter-mestic” character, but the point holds for a wider array of concerns, from telecommunications policy to counter-terrorism.<sup>11</sup> This is clearly true in the Atlantic space, north and south. Some of the most prominent concerns on this transregional, inter-mestic agenda are concentrated in the southern basin of the Atlantic, and will require wider Atlantic strategies in response.

West Africa and Brazil are at the center of some of the key changes on the energy security scene. Nigeria and Angola have emerged as important oil and gas producers, and the entire Gulf of Guinea region, including these countries plus much smaller producers such as Cameroon and Gabon, are set to play a larger role in the energy security calculus of the United States and Europe.<sup>12</sup> Despite problems of stability and security, these producers still look

<sup>11</sup> I am grateful to Abraham Lowenthal of the Pacific Council and the University of Southern California for the use of the term “inter-mestic” to describe these challenges concentrated at the level of cities and regions, but with essential international linkages.

<sup>12</sup> It is estimated that Africa holds roughly 8 percent of global oil reserves, and now accounts for perhaps 12 percent of world production. The U.S. imports roughly 15 percent of its oil from West Africa, principally from Nigeria, whose oil production is especially well suited to American refining needs. Angola is also a major supplier to the American market.

like a good bet from the point of view of investors and consumers. They are largely decoupled from the political dynamics driving production decisions within OPEC, and insulated from strategic risks in the Gulf. While hardly business friendly in the conventional sense (predictable rule of law, streamlined bureaucracies, etc.) they are largely free of the sovereignty-driven constraints on the activities of international companies common in Venezuela, Algeria, and elsewhere. Even small states such as Sao Tome and Principe hold the potential for significant offshore oil production, close to major international markets.

The rise of Brazil as a global energy player will also be transformative. The most recent discoveries in Brazil’s offshore waters place the country’s proven reserves at around 40 billion barrels, and many experts regard new finds as likely. As these resources are developed (a deep water, technology-intensive undertaking by Petrobras and a multitude of international partners), they could put Brazil among the top ten global energy producers, on a par with Nigeria and Venezuela.<sup>13</sup> Brazil also stands to become a major producer of gas and a growing exporter of refined petroleum products. New liquefied natural gas (LNG) exports from Brazil and elsewhere around the Atlantic basin will contribute to the progressive “commoditization” of gas trade—a key trend shaping the global energy picture—and give Atlantic partners an even greater stake in maritime security as a component of energy security. Offshore oil and gas exploration is underway in the waters surrounding the Falkland Islands (and spurring new diplomatic frictions between Britain and Argentina). Taken together, these developments are likely to make the wider Atlantic more central to European and

<sup>13</sup> For a discussion of the impact of energy finds on Brazil’s international position and other aspects of the Brazilian rise, see Juan de Onis, “Brazil’s Big Moment,” *Foreign Affairs*, Nov./Dec. 2008.

North American energy interests. Middle Eastern and Russian energy production is unlikely to be dislodged from its position of primacy in the near term, but over the next decades, the south Atlantic (alongside shale oil and gas production in the United States and Canada) may offer real competition to Eurasia as a center of gravity for energy security.

The Atlantic south of the Tropic of Cancer will have distinctive security dynamics, and offer special challenges for Euroatlantic security partners. Fortunately, and unlike the Asia-Pacific region or the Middle East, the south Atlantic lacks animating crises or flashpoints threatening global stability. Frictions abound, from troubled U.S. relations with Cuba and Venezuela, to the sometimes prickly relations among neighbors in Central and South America. Across the Atlantic, the Western Sahara dispute has bedeviled relations between Morocco and Algeria. For the most part, however, state-to-state conflicts have not been a key feature of the strategic environment in the wider Atlantic since the end of the Falklands War. This lack of conventional conflicts is a positive feature, of course, but it has also meant a degree of marginalization in strategic terms. There have been few incentives to pursue wider diplomatic and security arrangements, and little “architecture” to address the host of sub-state and non-traditional security challenges affecting the southern basin and its maritime approaches.

The South Atlantic is also largely free of the nuclear and missile proliferation dynamics driving security perceptions and policies in other settings. Indeed, the region contains three countries—South Africa, Brazil, and Argentina—that opted to halt dual-use nuclear programs. In technical terms, these countries will remain near-nuclear powers. This could take on new meaning against a backdrop of revived interest in nuclear power worldwide, and the potential for new nuclear armed states

emerging in other regions. It is most unlikely that Brazil would choose to go nuclear as part of its drive for greater strategic weight in the years ahead, but proliferation dynamics elsewhere could influence this calculus. For the moment, however, the concept of the South Atlantic as a zone free of nuclear weapons remains a defining characteristic of security diplomacy across the region.

Outside the arena of conventional conflict and competition, security problems abound. Many of these affect internal stability, but have wider implications for Atlantic interests. The Caribbean and Northwest Africa have been key venues for large scale migration, both economically and politically driven. For Spain, in particular, the route from Mauritania and the Western Sahara to the Canary Islands has been a major concern, and a key focus of recent EU surveillance and interdiction efforts. Security in North Africa is also affected by these migration flows from West Africa to Europe. North-South cooperation on both sides of the Atlantic will be a key test of the potential for managing human mobility on a concerted basis. Much more could be done to understand and use the lessons learned from migration policy experience on both sides of the Atlantic.<sup>14</sup>

The wider Atlantic has long been a focus of drug trafficking and interdiction, with places such as South and Central America and the Caribbean, and the Straits of Gibraltar as key poles in a global challenge, with ties to terrorism finance, human trafficking, and global health. Recent trends have strongly reinforced the role of the Atlantic system in the drug trade, with West Africa emerging as a prominent transshipment point for drugs sent from Asia and Latin America. To the extent that new security partnerships are developed around the

<sup>14</sup> See Ian O. Lesser, “Anxieties without Borders: The United States, Europe, and Their Southern Neighbors,” *International Spectator*, March 2005.

*Unlike the Asia-Pacific region or the Middle East, the south Atlantic lacks animating crises or flashpoints threatening global stability.*

*The increasing activism of organized crime networks of all kinds around the Atlantic south also poses more systemic risks for security.*

Atlantic basin, trafficking in all its dimensions will likely be at or near the top of the agenda. The traffic in light arms will be another related issue given the role of the small arms trade in fueling instability on both sides of the Atlantic south, above all in West Africa. For all of the Atlantic stakeholders, making these risks transparent, and avoiding the emergence of zones of chaos, will be guiding strategic concerns.

Threats of this kind affect the security of individuals and regional states, first and foremost. But the increasing activism of organized crime networks of all kinds around the Atlantic south also poses more systemic risks for security. One key example is the persistence of piracy targeting the offshore oil industry in the Gulf of Guinea. Piracy is also a modest problem along the Atlantic coasts of Central America and Brazil. Another reservoir of risk concerns evolving terrorist networks, whether narco-terrorism in Latin America, or Islamic extremists in West Africa. The security threats that have been at the center of transatlantic strategy since 9/11 do not just emanate from an arc stretching from the Maghreb to South Asia. The wider Atlantic is very much part of this evolving equation. The complex of risks emanating from West Africa has been one of the key drivers of American strategic attention to Africa as a whole, including the evolution of AFRICOM and a series of enhanced military cooperation activities across the Sahel and elsewhere. In June 2006, the NATO Response Force held a major joint exercise (Steadfast Jaguar) on Cape Verde, and surveillance and security in the waters off West Africa is a leading focus for NATO's Joint Command headquarters in Lisbon. The Atlantic islands of Cape Verde, Madeira, and the Azores (including the U.S. airbase at Lajes) can be particularly useful venues for new multinational efforts to address the complex of unconventional security risks affecting the Atlantic south of the Tropic of Cancer.

In the broadest sense, the wider Atlantic is at the center of revived interest in maritime security, from new blue water naval aspirations in Latin America, to anti-piracy and anti-smuggling operations, to the control of fisheries and counter-terrorism in coastal waters, and port security. The maritime security concerns of North Atlantic powers are likely to be focused southward to a considerable extent in the years ahead. Rising powers such as Brazil and South Africa will see maritime security as a key area for activism and cooperation. And smaller states, many lacking the capacity to assert their sovereignty over sea and air space, will require the assistance of more capable regional and extra-regional actors to undertake basic surveillance and patrol tasks.

All of this is likely to have a strong environmental dimension. A full discussion of the implications of climate change in high latitudes and in mid ocean is beyond the scope of this paper. But there can be little doubt that much of the policy debate about climate change and oceans policy over the next decade will play itself out in the Atlantic world, and especially in the south Atlantic. There is a long tradition of multinational governance and research in the Antarctic, and countries such as South Africa and Argentina will have a direct stake in the future of these arrangements. They are also likely to have their own complex debates on climate policy. Here, their shared political-economy perspective with Brazil, India, and other leading actors in the Global South may be in tension with their strong stake in environmental management in their own neighborhood.

Over the long term, climate change could also reshape the geoeconomics of the south Atlantic. The opening of an ice-free, or partly ice-free northern route between Asia and European markets could change shipping patterns much further south, reducing reliance on the Suez Canal and the approaches to the Mediterranean. In a very different sense, the longer Cape route from the Gulf

to the Atlantic is already enjoying a revival as a result of piracy in the Indian Ocean and the Red Sea, and the number of vessels too large to transit the Suez Canal.

Finally, the future of global trade and development policy debates will be critical to the future of many south Atlantic societies, and vice versa. Here, Brazil is likely to be the key player. To the extent that Brazil acquires a stronger stake in Atlantic partnerships with Europe and the United States, this could mean a higher degree of convergence in traditionally divergent approaches to agricultural subsidies, environmental and labor standards, and a range of adjustment and reform questions.

Alternatively, Brazil and South Africa may opt for a more explicitly southern approach, with both countries adopting a more assertive stance with neighbors on both sides of the Atlantic in defense of developing country perspectives. At a certain point, Brazil may become a more prominent provider of development assistance in its own right. Certainly, Brazil's position as a key trading partner and investor will exert a strong influence on the development and prosperity of smaller countries on both sides of the Atlantic. In this, as in other areas, the era of South Atlantic marginalization may be drawing to a close.

# 7 SOUTHERN EXPOSURES, SOUTHERN INTERESTS

*Movement toward closer security cooperation with south Atlantic partners through NATO is likely to prove more controversial.*

What is the transatlantic constituency for greater strategic attention to the southern Atlantic, and perhaps for a new wider Atlantic strategy? Who will lead the debate and who will have the greatest stake in the outcome? On the European side, Portugal and Spain have been most active in promoting a south Atlantic agenda for clear historical and commercial reasons. Spain rightly perceives a special vocation in Spanish-speaking Latin America, and has long been a leader in EU policy toward the region. Spanish economic ties to the area are particularly well established, and most visible in the banking, energy, and telecommunications sectors.

In this sphere, Portugal “punches above its weight.” Portuguese-speaking populations are concentrated around the Atlantic basin, and diplomatic, cultural, and commercial ties to Brazil, Angola, and Cape Verde remain vigorous. Moreover, this is very much a two-way street. Migration from these parts of the former Portuguese empire has made Portugal among the most comfortably multi-cultural countries in Europe. Brazilian investment has long been a feature on the Portuguese scene, and Angolan investment is starting to appear in banking, real estate, and other sectors. More broadly, interest in the Atlantic as a strategic orientation has always been lively in Portugal, even as the country has been increasingly “Europeanized” in policy terms. Portuguese leaders look to Brussels, of course, but often with a serious nod to Washington and the wider North American constituency. There is a strong human dimension to this engagement, not least because of the large Portuguese community in North America. This Portuguese diaspora has an important mid and southern Atlantic dimension, too, as many Portuguese migrants to North America (and Brazil) come from the Azores or Cape Verde. Similarly, many Portuguese have family ties to Angola or other places in Africa. These connections continue

to exert a meaningful influence on Lisbon’s foreign policy perceptions, and these can also be felt in Portugal’s NATO and EU policies.

Portugal, and to a lesser extent, Spain, will be natural leaders with regard to European interest in wider Atlantic issues and initiatives. But the interest could be more widely shared. The growing role of Brazil as an economic partner for Europe is likely to produce a much larger constituency, building on a longstanding pattern of European investment in Latin America and Africa. Swedish firms have a long history of investment in Brazil, and the Swedish government was among the first to reduce tariffs on Brazilian agro-products. In West Africa, France has long been a major stakeholder, with an active political and defense engagement alongside economic ties. In Nigeria and South Africa, the British connection remains strong. Alongside the United States, Britain and France are capable of projecting significant military power into the Atlantic south of the equator. To the extent that West Africa and Brazil loom larger in energy security terms, Europe as a whole is likely to acquire an increased stake in developments in the Atlantic south. Movement toward closer security cooperation with south Atlantic partners through NATO is likely to prove more controversial. For Germany, Poland, and other countries increasingly focused on traditional missions and unfinished business in the east and the challenge of a more assertive Russia, the prospect of a major new outreach to the south is likely to be seen as a strategic distraction.

On the North American side, interest in the south Atlantic and consideration of wider Atlantic strategies is likely to be driven by several factors. There will be a natural interest in Brazil and South Africa as emerging markets among diverse commercial actors. Brazil, in particular, may be seen as a higher-growth opportunity in a period—possibly protracted—of low growth in

the developed economies. Strategic constituencies are likely to see the African and South American countries of the South Atlantic as key tests for the behavior of China (and India?) as global competitors, and perhaps as a theater of geopolitical competition. As a global power, the United States will continue to pay close attention to security risks emanating from the Atlantic basin, and most of these are likely to be found south of the Tropic of Cancer, including terrorism and international crime. Fourth, and most compelling, elements of the American foreign policy elite concerned with reinvigorating transatlantic relations may acquire an interest in recasting the idea of Atlanticism to embrace a wider set of countries and issues. The notion of a wider Atlanticism could also be a promising vehicle for developing stronger ties to South America, long a problematic venture in American policy.

There will be a strong regional dimension to the American interest in looking south around the

Atlantic basin. This is already an uncontroversial idea among political and economic leaders in Miami. Culturally, logistically, and even politically, Florida has become the gateway for interaction with Latin America, and especially the cities of Atlantic South America. Migration and trade links are giving the entire southeastern United States a more pronounced stake in developments around the Caribbean and Latin America, including Brazil. These interests can make themselves felt at the level of the national foreign policy debate, along the lines of the Californian stake in Mexico, although this is hardly inevitable, as the longstanding failure to develop a comprehensive strategy toward Mexico suggests. Major container ports on the U.S. Atlantic Coast are natural stakeholders in wider Atlantic relations, much as the Port of Los Angeles is a major stakeholder in Asia-Pacific trade. Local and regional interests of this kind may well play a key role in the wider Atlantic debate, especially in the absence of animating strategic concerns at the level of high politics.

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# 8 SOME ALTERNATIVE SCENARIOS

Looking ahead, with a ten year time horizon, it is possible to envision a range of scenarios for the wider Atlantic space, with varying implications for the transatlantic interests of the United States and Europe. Some of these alternative “futures” may be shaped by policies emanating from Washington or Brussels. Others will be driven by regional and national dynamics over which the traditional Atlantic powers may have little leverage. Over the next decade, the plausible alternatives include:

***Comprehensive Atlanticism.*** In this scenario, the interests of traditional and emerging powers around the Atlantic basin, north and south, align in ways that facilitate the development of wider Atlantic identities and strategies. This scenario would be encouraged by U.S.-EU agreement on the idea that revived transatlantic partnership will benefit from some geographic redefinition. Ideally, this could include active steps by NATO and the EU to enhance ties with key actors around the South Atlantic. Portugal, Spain, and France could drive these initiatives at the political level. An American commitment to more serious engagement with Latin America could be cast in this Atlantic mold, and this could give further impetus to comprehensive Atlanticism. Above all, this scenario presupposes a convergence of interest between north and south on key issues affecting Atlantic security and prosperity, from trade and environment, to development and security. Advocates would argue that a wider Atlantic identity offers countries such as Brazil and South Africa a serious alternative to purely regional and southern vocations. The prospect of a rising China, with a growing presence around the Atlantic basin, could spur consideration of comprehensive Atlanticism as a counter to the perceived waning of European and North American influence.

This scenario will face some structural impediments, not least the need to accommodate the Atlantic’s own rising powers in institutionally

meaningful ways, from UN Security Council reform to new NATO partnership initiatives. More remote, but worth considering, is the potential for a new security architecture for the Atlantic as a whole, or perhaps a SATO (South Atlantic Treaty Organization) in which Europe and North America would be members along with others. At a time when NATO is searching for concepts and resources to meet its current commitments, it is hard to imagine a consensus in favor of a significant new geographic expansion of this kind.<sup>15</sup> As small and medium-sized countries south of the Tropic of Cancer face a range of difficult transnational security problems, they may well seek the strategic reassurance of closer ties to NATO short of membership; a form of borrowed security in regions where security architecture is weak or non-existent. Europe, too, could be a more significant security partner for Latin American countries wary of American power.<sup>16</sup> Larger, sovereignty conscious powers such as Brazil or South Africa—precisely the actors of greatest potential use to the alliance—may be the most resistant to new ties of this kind.

***Alignment with the Global South.*** In this scenario, the major actors in the South Atlantic opt for alignment with alternative, non-Western actors, including India. The unifying identity in this case is consciously that of the developing South. Brazil and South Africa have already adopted much of the vocabulary and strategic outlook associated with this approach, some of it borrowed from

<sup>15</sup> The notion of a global NATO, open to like-minded democracies outside the traditional European and North Atlantic space has been widely debated. For an analysis in this vein, see Ivo Daalder and James Goldgeier, “Global NATO,” *Foreign Affairs*, Vol. 85, No. 5, Sep./Oct.2006. The argument seems much less persuasive in today’s climate of impasse in Afghanistan, confusion over the future role of the alliance, and global differences outside the security realm, on trade, climate and other matters.

<sup>16</sup> See Alfredo G. A. Valladao, “Necessite et Difficultes d’une Cooperation de Securite et Defense entre l’Europe et l’Amerique Latine,” *Occasional Paper*, No. 73 (Paris: European Union Institute for Security Studies, Nov. 2008).

the non-aligned movement. Venezuela has been a leading proponent of this worldview, including the cultivation of economic, political, and security ties with Russia and Iran. Argentina has also flirted with anti-Western populism, at least in the economic arena.

It is unlikely that the leading actors in the south Atlantic will adopt a posture of the kind promoted by Hugo Chavez. But a turn toward more strident populist and anti-Western policies in Brazil or South Africa cannot be dismissed entirely. New economic crises and a return to unstable politics could encourage this, although the more likely development in this case would be a return to inward-looking, nationalist policies. Under these conditions, Brazil and South Africa—pivotal states in terms of the construction of wider Atlantic identity and strategy—would likely spurn any formal new proposals for South-South cooperation and institution building. Ideological preferences, and perhaps some common approaches to climate and other issues, could favor the development of a broader identification with the Global South among key south Atlantic states. But it may be hard to translate this into a concerted strategy. Despite the changes brought by globalization and the growing role of China and India in Africa and South America, countries such as Brazil, Argentina, and South Africa, alongside smaller actors in the region, still look to Europe and North America as key international partners. The long-term basis for policy convergence between, for example, Mexico or Argentina and India, is weak. In this sense, geography and history still matter.

**Atlantic Regionalism.** A more likely scenario, indeed one that already exists in various forms, would see key actors around the Atlantic basin south of the Tropic of Cancer aspiring to regional leadership and cooperation with neighbors. This may or may not be linked to a wider sense of Atlantic identity or convergence of interest with

traditional Atlantic actors. Examples along these lines include the South African Development Community (SADC) and Mercosur in South America. NAFTA, too, could be considered a grouping of this kind, although rarely described as an Atlantic initiative *per se*.

Beyond formal regional structures, the preference for regionalism is deeply imbedded in the external policy preferences of important Atlantic actors. Mexico has clearly opted for a North American identity, and competes with Brazil, Argentina, and Venezuela for leadership in Latin America. Arguably, Brazil continues to measure its power and potential largely in terms of influence in South America. On the African continent, Morocco has given priority to regional integration in different spheres; looking east and south to neighbors in the Maghreb, and looking across the Mediterranean to European partners (unusually, Morocco also has a strong interest in an Atlantic identity). As in other scenarios, a turn toward nationalistic and sovereignty-conscious policies can work against Atlantic regionalism. This tendency, in turn, can be highly dependent on global economic conditions. Regional frictions can impede cooperation in practical terms, but SADC and Mercosur offer good examples of how regional integration can be encouraged in an incremental fashion.<sup>17</sup>

A variant of this scenario would see the further evolution of existing, limited cooperative initiatives across the South Atlantic, including those addressing specific functional challenges. Frameworks of this kind were established in 1966 in the form of the South Atlantic Maritime Area Coordination, and in 1986 with the “Zone of Peace and Cooperation in the South Atlantic.” Discussions in the latter have addressed the

<sup>17</sup> See Alfredo Valladao, *Regional Integration: Lessons from Latin America* (Washington, DC: The German Marshall Fund of the United States, Feb. 2010)

*As in other scenarios, a turn toward nationalistic and sovereignty-conscious policies can work against Atlantic regionalism.*

challenges associated with the Brazilian-Nigerian-South African drug-trafficking nexus.<sup>18</sup> South Africa and Brazil have been the key actors in these forums, addressing issues from de-nuclearization and environmental and maritime coordination, to commercial and “people to people” contacts.

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<sup>18</sup> Greg Mills, “South African-Latin American Maritime Cooperation: Towards a South Atlantic RIM Community?” *Diplomats and Defenders* Monograph No. 9, Johannesburg, Feb. 1997.

Brazil, Uruguay, and Argentina have cooperated in ATLASUR (Atlantic South) to organize joint naval exercises, some in South African waters. The longstanding multinational approach to research and governance in the Antarctic offers another key example. Others can be found in the Caribbean. In a sense, the major Euroatlantic institutions, even NATO, fall into this category. Atlantic regionalism can be regarded as the default posture on both sides of the equator.

# 9 ATLANTICISM IS A MOVEABLE FEAST

Taking into account of these alternative scenarios, the next decade is most likely to see the coexistence of multiple Atlanticisms, with varying identities and partners in play. A sense of drift within traditional transatlantic partnerships and institutions has already given rise to a search for new concepts and new strategies. It has been fashionable in some quarters to argue that with the rise of Asia and the globalization of the international agenda the Atlantic is no longer a particularly useful frame for organizing strategy, especially for the United States. The sheer weight of economic and security relations across the North Atlantic argue against this view. More interesting from the vantage point of this analysis, is the idea that transatlantic relations have been cast *too narrowly*. Large potential partners in the south Atlantic, or more precisely, south of the Tropic of Cancer, have simply been left out of the wider geopolitical debate. International investors and energy specialists may focus on Brazil and West Africa, but the strategic class on both sides of the Atlantic has yet to be converted. At the same time, those policymakers and institutions attuned to the value of closer ties with West and South Africa, and South America, rarely place these relations in an Atlantic frame. The debate over the future of transatlantic relations continues to focus almost exclusively on the North Atlantic axis. New powers and new challenges and opportunities emanating from the south are largely off the NATO or U.S.-EU agenda. As a result, transatlantic relations continue to “fire on only half its cylinders.” To the extent that the rise of China, and the BRIC (Brazil, Russia, India, and China) countries as a bloc, raise questions about the future of West, it may be even more useful to expand the definition of Atlantic partners.

This will be especially important in terms of defining the future of American and European relations with Brazil and South Africa. But it will also be important in shaping the future of relations with Argentina, Mexico, the energy producing states of West Africa, and politically critical states like Morocco. As the rising powers of the South Atlantic develop new foreign policy identities and orientations, and as smaller countries seek new geometries in their international engagements, the Atlantic identity and Atlantic institutions should be front and center. With some notable exceptions, little in the African and Latin American discourse on foreign policy for the 21st century has made Atlanticism the focal point for identity and strategy. The absence of interest in Atlanticism as an animating idea is as striking in the south as it is in the north.

The notion that transatlantic relations have considerable untapped energy in the south should inform current debates about how to reinvigorate relations between North America and Europe, as well as North-South relations. If the United States and Europe fail to engage the south in Atlantic terms, there is a very real risk that key partners will opt for alternative identities. These are likely to be framed in terms of the global south, or purely national perspectives. Neither posture is likely to promote closer cooperation with Washington or Brussels on common challenges. The result would be a fragmented Atlantic space in which critical opportunities for collaboration will be lost.

*If the United States and Europe fail to engage the south in Atlantic terms, there is a very real risk that key partners will opt for alternative identities.*

# 10 IMPLICATIONS FOR STRATEGY AND POLICY

*A small set of countries, including Portugal, Spain, and Morocco, will have a comparative advantage in thinking through and implementing a wider Atlantic strategy.*

Ideally, the next decade will see the emergence of a comprehensive Atlanticism in which diverse actors put their Atlantic identity first. In reality, this is unlikely, not least because most states around the basin have multiple identities and interests—including their continental neighborhoods—that are both wider and narrower than the Atlantic frame. But the Atlantic can be given greater prominence as a focal point for strategy and policy, especially where external policies are in flux.

First, policymakers on both sides of the Atlantic need to rethink their mental maps when debating the future of transatlantic relations. The relevant space does not stop at the Tropic of Cancer, and much of the future vigor and content of transatlantic relations will derive from challenges and opportunities in the south Atlantic, broadly defined. As this analysis suggests, some of the most prominent concerns over the next decade, from energy to human security, from trade and development to the environment, will have their center of gravity in the south, rather than the north. Demographics and social trends will be additional drivers of a transatlantic future more closely balanced between north and south. To the extent that rising powers in the Asia-Pacific region threaten the position of Europe and North America over the next decade—an open question—integrating the new, emerging powers in the Atlantic space will be a natural response.

Second, a small set of countries, including Portugal, Spain, and Morocco, will have a comparative advantage in thinking through and implementing a wider Atlantic strategy. By virtue of history, language and geography, these countries—along with Brazil—can play a leading role in encouraging traditional North Atlantic actors and institutions to look southward. These countries are also the most logical conveners for official policy planning discussions on issues cutting across traditional intellectual and bureaucratic lines, but relevant to

the wider Atlantic space. This is analogous to the role played by France and southern European states in Euro-Mediterranean strategy, or by Germany in policy toward the east.

Third, as NATO addresses competing demands for global engagement, on the one hand, and pressures to refocus on core European security business, on the other, policy for the “other half” of the Atlantic space should be on the agenda. This is not necessarily an argument for formal enlargement in the south Atlantic or elsewhere. But NATO can and should consider deepening its dialogue and cooperation south of the Tropic of Cancer. Morocco and Mauritania are already part of this process through their membership in NATO’s Mediterranean Dialogue. The dialogue could be a model for outreach and practical security cooperation in the south Atlantic. Indeed, it might prove more effective in the absence of the Arab-Israeli tensions that have plagued security cooperation in the Mediterranean. The potential agenda for collaboration is large, from anti-piracy operations in the Gulf of Guinea to maritime surveillance, search and rescue, and environmental security missions throughout the south Atlantic. The November 2010 Lisbon NATO Summit will be an excellent and highly symbolic opportunity to start a serious debate about alliance strategy for the Atlantic south.

Fourth, a wider notion of Atlanticism can benefit from dedicated centers for analysis and debate, beyond the traditional North American and European venues. Morocco’s Skhirat Initiative is one example. It is also possible to imagine other official or civil society efforts of this kind based in Cape Verde or the Azores. In operational terms, these islands are also well placed for the conduct of new multinational maritime operations, including new uses for Lajes air base in the Azores. Over the longer term, new efforts outside traditional security institutions may be necessary to engage

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potential Atlantic partners with little or no interest in cooperation with NATO—Venezuela, Argentina, possibly even Cuba.

Finally, the shift to a wider Atlanticism, with multiple Atlantic identities and a larger set of partners and issues is a long-term strategic objective. More ambitious variants will require the transformation of problematic relationships, including the American relationship with

Venezuela and Cuba. This will not be easy, and may not happen at all. In the near term, however, it will be important to start the debate and begin the process of engaging a range of key actors, including Brazil and South Africa, whose external policies are not fixed, and where an Atlantic identity can compete legitimately with narrower regional ambitions and the ideological pull of the Global South.

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