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ALIGNMENT STATECRAFT AND ALIGNMENT DILEMMA

The causes of hedging under US-China competition in Latin America's
digital infrastructure

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Abstract

What compels states to show explicit alignment strategies during great power competition? Building on the balance of threat theory and hedging literature, we argue the primary trigger is not the rise of a great power or rivalry itself, but Negative Alignment Statecraft (NAS): the use of economic or security coercion by a great power to limit a third state's engagement with its rival. We contend that NAS creates an Alignment Dilemma and forces targeted states to clarify their positions. To test this, we conduct a comparative analysis of two sectors in Brazil, Chile, and Mexico with growing Chinese presence: 5G/4G antennas and data centers. Where NAS was present, the countries explicitly hedged. Where it was not, hedging—if it existed—remained passive or hidden. Our findings contribute to ongoing debates about the causes of hedging by specifying a mechanism that pushes states toward active alignment strategies. But this raises a further problem we term Schrödinger's Alignment: a condition in which it is analytically unclear whether a state is pursuing a hidden alignment strategy or no strategy at all.

Keywords

Great Power Rivalry; Balance of Threat; Weaponized Interdependence; 5G; Data Centers; International Political Economy

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POLÍTICAS E DILEMA DE ALINHAMENTO

As causas do hedging na competição entre os Estados Unidos e a China na infraestrutura digital da América Latina

Resumo

O que leva os Estados a revelar suas estratégias de alinhamento durante a competição entre potências? Com base na teoria do Balance of Threat (Balanço de Ameaças) e na literatura sobre hedging, argumentamos que o principal desencadeador não é a ascensão de uma potência nem a rivalidade entre potências, mas sim as Políticas Negativas de Alinhamento (Negative Alignment Statecraft - NAS): o uso de pressão econômica ou de segurança por parte de uma potência para limitar a relação de um terceiro Estado com a potência rival. Sustentamos que o NAS cria um Dilema de Alinhamento e leva os Estados a manifestar suas posições. Para testar isso, comparamos dois setores no Brasil, Chile e México com crescente presença chinesa: antenas 5G/4G e centros de dados. Onde o NAS esteve presente, os países se alinharam explicitamente. Onde não esteve presente, o hedging — se existiu — permaneceu passivo ou oculto. Nosso artigo busca contribuir para os debates sobre as causas do hedging ao especificar um mecanismo que induz os Estados a adotar estratégias ativas de alinhamento. Mas isso levanta um problema adicional que denominamos Alinhamento de Schrödinger: uma condição em que não está claro se um Estado está seguindo uma estratégia de alinhamento oculta ou nenhuma estratégia de alinhamento.

Palavras-chave:

Rivalidade entre Potências; Balanço de Ameaças; Weaponized Interdependence; 5G; Centros de Dados; Economia Política Internacional

POLÍTICAS Y DILEMA DE ALINEAMIENTO

Las causas del hedging en la competencia entre Estados Unidos y China en la infraestructura digital de América Latina

Resumen

¿Qué impulsa a los estados a revelar sus estrategias de alineamiento durante la competencia entre potencias? Basándonos en la teoría del balance de amenazas (Balance of Threat) y la literatura sobre “hedging”, argumentamos que el desencadenante principal no es el ascenso de una potencia ni la rivalidad entre potencias, sino las Políticas Negativas de Alineamiento (Negative Alignment Statecraft - NAS): el uso de presión económica o de seguridad por parte de una potencia para limitar la relación de un tercer estado con la potencia rival. Sostenemos que el NAS crea un Dilema de Alineamiento e impulsa a los estados a manifestar sus posiciones. Para probar esto, comparamos dos sectores en Brasil, Chile y México con una creciente presencia china: antenas 5G/4G y centros de datos. Donde estuvo presente el NAS, los países se alinearon explícitamente. Donde no estuvo presente, el hedging —si existió— permaneció pasivo u oculto. Nuestro artículo intenta contribuir a los debates sobre las causas del hedging al especificar un mecanismo que induce a los estados hacia estrategias activas de alineamiento. Pero esto plantea un problema adicional que denominamos Alineamiento Schrödinger: una condición en la que no está claro si un estado está siguiendo una estrategia de alineamiento oculta o ninguna estrategia en absoluto.

Palabras Clave

Rivalidad entre Potencias; Balance de Amenazas; Weaponized Interdependence; 5G; Centros de Datos; Economía Política Internacional

INTRODUCTION

What compels states to reveal their alignment strategies amid great power competition? While existing literature—particularly on hedging—offers valuable insights into how states navigate uncertainty, it largely focuses on Asia, where security threats are often assumed. In contrast, the drivers of alignment in Latin America remain less clearly defined. We argue that the decisive trigger is not the rise of a great power or rivalry itself, but a specific coercive practice we term Negative Alignment Statecraft (NAS): when a great power employs economic or security tools to pressure a third state into reducing its engagement with a rival.

Our argument builds on Balance of Threat (BoT) theory, which holds that states align not simply in response to power but to perceived threats (Walt, 1985, 1990). We identify NAS as a distinct form of statecraft that directly modifies those perceptions. By threatening retaliation or withdrawing benefits, a great power alters a third state's cost-benefit calculus of engaging with its rival. This gives rise to what we call the Alignment Dilemma: a situation in which a state must choose between complying with coercive pressure—damaging its relationship with one power—or resisting, and risking punishment by the other. This dynamic is particularly visible in the development of digital infrastructure, where asymmetric interdependence opens space for coercive leverage. While much of the weaponized interdependence literature emphasizes coercive network leverage (Farrell & Newman, 2019), we conceptualize NAS more broadly. It includes coercive alignment efforts that operate with or without control over network hubs.

To test this framework, we examine how Brazil, Chile, and Mexico have responded to Chinese engagement in two sectors: 5G/4G mobile antennas and data centers. In both, Chinese firms have expanded significantly, yet only the antenna sector has attracted sustained, alignment pressure from the United States. In contrast, Chinese investment in data centers—essential to AI and cloud computing—has grown with little US pushback. Our research question is therefore: how and why did Brazil, Chile, and Mexico respond differently to Chinese involvement in 5G/4G mobile antennas and data center infrastructure? This sectoral divergence allows us to isolate the causal role of NAS in triggering alignment strategies. By comparing states' behaviors across two sectors with different levels of external coercion, we try to contribute to debates on hedging and alignment (Goh, 2007; Kuik, 2008, 2024; Lim & Cooper, 2015; Tan, 2020; Wilkins, 2023; Marston, 2024; Zhao, 2025). Engagement with multiple great powers does not necessarily imply hedging or alignment. We argue that alignment strategies emerge only when states confront an alignment dilemma caused by the threat of NAS. In doing so, our framework identifies a specific theoretical trigger for alignment, building on BoT theory and the hedging literature.

This article is organized as follows. The next section reviews theories of alignment and hedging, arguing that while they capture ambiguity, they overlook what triggers explicit alignment strategies. We introduce NAS as that trigger and develop a framework linking NAS to the Alignment Dilemma. We then compare Brazil, Chile, and Mexico across two sectors—5G/4G

antennas and data centers—using a treatment–control design to isolate the effect of NAS. In the 5G sector, US coercion prompted explicit alignment strategies; in the data center sector, where NAS was absent, strategies remained implicit or indiscernible. We conclude by discussing the broader implications of Schrödinger’s Alignment for understanding the dynamics of coercion and the limits of hedging in great power rivalry.

THEORETICAL FRAMEWORK

DEBATING THE TRIGGERS OF ALIGNMENT STRATEGIES

The debate on what triggers alignment strategies has often been shaped by realist theory, which suggests that states choose to either balance against or bandwagon with a dominant power. The “balance of power” theory proposes that states, fearing domination, will form coalitions (external balancing) or build up their own military capabilities (internal balancing) to resist a rising power (Waltz, 1979). This logic was later refined into the Balance of Threat (BoT) theory, which argues that states do not balance against power alone, but against perceived threats, which are a function of a state’s aggregate power, geographic proximity, offensive capabilities, and aggressive intentions. In this view, balancing is a defensive strategy driven by the desire to avoid losses and preserve survival. Conversely, bandwagoning has been understood as aligning with the source of danger out of fear (Walt, 1985, 1990) or, as revisionist scholars argue, as an opportunistic move to share in the spoils of victory (Schweller, 1994). These foundational concepts, however, were developed during the Cold War and have proven insufficient to capture the diverse choices of smaller and middle powers, which often fall somewhere between outright balancing and bandwagoning.

While BoT offers valuable insights into how states respond to perceived dangers, it does not adequately distinguish between general threat perceptions and the more specific moments in which alignment decisions become necessary. The framework implies a range of responses—such as increasing defense budgets or minimizing security or economic dependencies—that do not necessarily lead to clear positioning *between* great powers. In many cases, states may adjust their policies in ways that reflect concern about a rising power, yet these responses remain limited to bilateral trade-offs and avoid declaring alignment with either side in a great power competition. Without alignment pressures, such measures can appear ambiguous or even neutral—not necessarily because states lack strategic intent, but because they face no immediate threat to make alignment strategies explicit.

In response to the limits of the balancing–bandwagoning framework, many scholars have turned to the concept of hedging to describe how states respond to uncertainty and diffuse threats. Hedging is often defined as a forward-looking strategy used not in reaction to immediate danger, but to manage the possibility of future threats. It is thus distinguished from balancing, which responds to a clear and present threat. Scholars such as Haacke & Ciorciari (2022) and Kuik (2021)

emphasize hedging as a form of insurance-seeking behavior, where states adopt seemingly contradictory policies to preserve flexibility and avoid early commitment. Others, including Lim and Cooper (2015) and Wu (2019), highlight the ambiguity of security signaling as central to hedging: rather than aligning clearly with one great power, states send mixed signals to maintain autonomy and reduce vulnerability. In this view, hedging arises when the risks posed by great power rivalry are real but uncertain, and when no direct coercion forces a binary choice. The prioritization of which risks to act upon is not objective, but shaped by domestic political incentives—a theme that appears in David’s (1991) theory of “omnibalancing,” Schweller’s (2004) analysis of “underbalancing,” and, more recently, in Kuik’s (2008, 2023) and Marston’s (2024) emphasis on how domestic actors frame and filter external risks in the context of hedging. These insights suggest that alignment decisions are shaped not just by foreign threats and great power rivalry, but by how states interpret and rank risks depending on their internal characteristics.

While Cold War-era theories like BoT emphasized military security, China’s rise creates a “security/economic disconnect” for many states (Wilkins, 2023). Many simultaneously rely on the US for external security and China for internal stability (Greitens & Kardon, 2025). To maintain conceptual clarity, Lim & Cooper (2015) call for a narrow definition of hedging limited to costly security signals, excluding low-cost economic engagement. Others argue hedging must be multi-dimensional, capturing the security–economic nexus, as states mix contradictory policies to manage risks across domains (Lim & Mukherjee, 2019; Wilkins, 2023). Other studies show states often pursue stronger US security guarantees precisely to offset the risks of maximizing economic ties with China (Wu, 2019). The debate thus reflects the challenge of managing security and/or economic trade-offs under great power competition.

As US-China competition in digital technologies intensifies, scholars have examined threat perceptions and security-economic trade-offs in this area. Papageorgiou, Can, and Vieira (2024) apply BoT theory to emerging technologies, arguing that China now meets all four criteria of threat and that Western responses amount to a form of “gradual balancing”. However, their analysis—similar to approaches like “collective resilience” (Cha, 2023)—does not consider that US practices, such as the Snowden revelations of 2013 on surveillance, are also widely interpreted as threatening (Farrell & Newman, 2019, pp. 71–73). In the 5G sector, Kuik (2024) distinguishes between “heavy hedging”, prioritizing security at economic cost, and “light hedging”, emphasizing economic gains while downplaying security risks. Zhao (2025) similarly identifies strong, weak, and medium hedging strategies in Southeast Asia’s AI policies, shaped by domestic factors such as elite preferences and resources. While we agree on the importance of domestic drivers, these works often equate risks with security and benefits with economics. We argue instead that trade-offs exist within each domain: engagement with great powers involves both security risks and benefits (Snyder, 1984) and both economic costs and gains (Mastanduno, 1998; Zelicovich & Yamin, 2024).

While the hedging framework has provided a more nuanced understanding of alignment, it still

presents an analytical puzzle. When a state engages with multiple great powers, is it managing interdependent pressures—where its actions toward one power directly affect its relationship with the other—or merely addressing a set of separate bilateral issues? In other words, is the state navigating cumulative trade-offs across multiple relationships, or confronting alignment trade-offs? By alignment trade-offs, we refer to the costs that arise when increasing the engagement with one great power necessarily entails losses in the relationship with another great power. However, the presence of such trade-offs does not, by itself, create an alignment dilemma. States often balance competing interests across relationships without being forced into siding choices. A polarizing world order may even expand a state’s engaging alternatives, allowing it to extract concessions from both sides.

We argue that what transforms these trade-offs into an alignment dilemma is a particular kind of threat: NAS. As an inherently triadic action—a coercive measure by one great power aimed at altering a third state’s engagement with its rival—NAS reshapes the problem from a dyadic calculation (“How do I counter this threat?”) to a triadic one (“How do I position myself between competing powers?”). This article therefore argues that while existing literature has identified the incentive to hedge, it has failed to specify this causal trigger.

ALIGNMENT STATECRAFT AND WEAPONIZATION

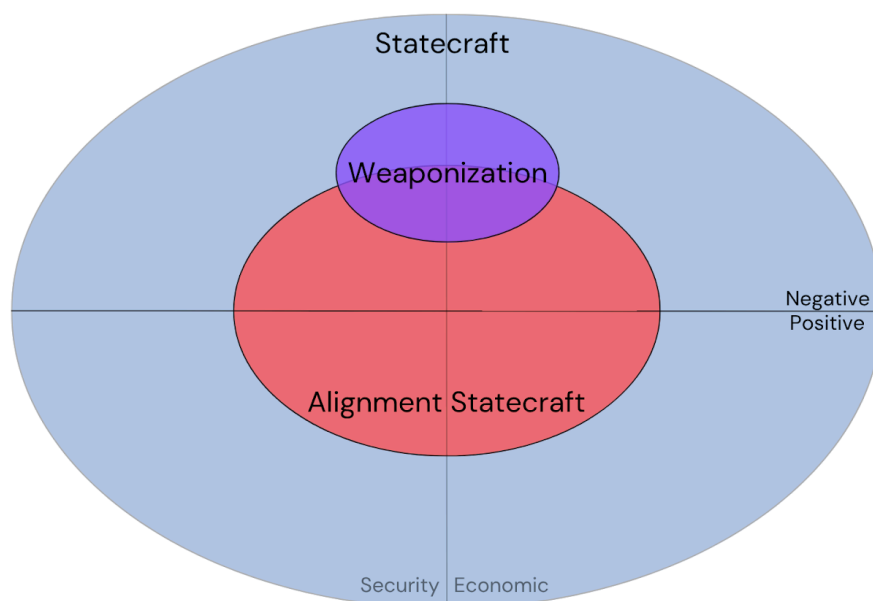
We define Alignment Statecraft as the use of economic or security tools by a great power to influence a third state’s alignment choices vis-à-vis another great power. Unlike traditional statecraft, which targets an adversary or partner directly, or liberal statecraft, which emphasizes institution-building and cooperative order (Ikenberry, 2024), alignment statecraft seeks to shape third states’ security or economic choices in great power rivalry. This highlights a gap in existing approaches of statecraft. Baldwin’s (2020) framework for economic statecraft highlights positive and negative tools to influence behavior but does not examine how they redirect uninvolved states toward or away from rivals. Likewise, while Drezner’s (2011) concept of smart sanctions explains targeted coercion, the logic of influencing third-party alignments—especially outside formal alliances—remains undertheorized. Alignment Statecraft thus offers a new analytical category: drawing on existing tools but highlighting a separate objective—shaping the position of third states amidst great power competition.

Within Alignment Statecraft, we distinguish between positive and negative forms. Positive Alignment Statecraft—or “alignment carrots”—refers to the use of inducements to encourage third states to distance themselves from a rival power without resorting to threats or constraints. For example, US support for Nokia and Ericsson in third-country 5G rollouts offers a non-coercive path away from Huawei. This builds on Baldwin’s insistence that positive economic tools—such as aid or preferential trade—can be as influential as sanctions but are often neglected in analysis. In contrast, Negative Alignment Statecraft (NAS) —or “alignment sticks”—

involves coercive instruments such as diplomatic pressure, exclusion threats, or conditionalities to limit a third state's engagement with the rival. A clear example of NAS is the US campaign to discourage adoption of Huawei's 5G infrastructure through security warnings and diplomatic lobbying (Calcara, 2023; Lee, 2022). As shown in Image 1, not all statecraft coercion qualifies as alignment statecraft. For instance, China's restrictions on rare earth exports to the US or US tariffs on Chinese goods are examples of negative economic statecraft aimed at direct bilateral leverage, not at shaping a third state's alignment choices. Similarly, sanctions imposed directly on Russia to constrain its military do not count as alignment efforts unless they also involve influencing third-party behavior. Such 'beggar-thy-neighbour' measures (Rodrik & Walt, 2024) may be economically disruptive but do not qualify as alignment statecraft. This conceptual distinction allows us to isolate a specific, yet increasingly common, form of strategic behavior in contemporary international relations.

Image 1:

Conceptual Map of Alignment Statecraft and Weaponization



Source:

Elaborated by the authors

Weaponization refers to how states occupying key positions in network hubs can transform interdependence into coercive leverage by monitoring or restricting access to infrastructures (Farrell & Newman, 2019). We build on this concept and argue that when this form of coercion is used directly against a rival (without targeting third states), it falls outside the scope of alignment statecraft. However, when interdependence is leveraged to pressure third parties—such as foreign

firms or governments—it becomes both a case of weaponization and of NAS: alignment weaponization. A key example is the US pressure on ASML and the Dutch government to restrict exports of chipmaking equipment to China (Malkin & He, 2023). This action simultaneously qualifies as weaponization—since it exploits technological hubs—and as NAS—since it targets a third state to constrain China’s semiconductor development. In these cases, coercion operates through critical networks nodes controlled by foreign firms or countries since the great power does not have the capacity to coerce only with its own firms.

Not all instances of weaponization, however, are forms of alignment statecraft. When a state applies export controls or bans within its own jurisdiction—such as the US prohibiting Qualcomm from selling 5G chips to China—this constitutes non-authoritarian weaponization. It is coercive, but does not alter the behavior of third countries. Conversely, as illustrated in Image 1, not all NAS involves weaponization, since coercive pressure on third states or firms can occur without exploiting network hubs. Diplomatic pressure on actors like Brazil or the UK not to adopt Huawei’s 5G antennas exemplifies alignment sticks that do not rely on chokepoints (Segal, 2021).

These distinctions in statecraft help clarify how NAS operates as a specific kind of threat that triggers the alignment dilemma. Within the BoT framework, we argue that this form of coercive statecraft serves as a clear signal of a great power’s “aggressive intentions” (Walt, 1990), prompting a clear response. Unlike the broad and indirect threat posed by a rival’s growing overall power—which leaves room for ambiguous hedging—NAS confronts the third state with an immediate and unavoidable decision. It forces the state to weigh the costs of complying—such as weakening ties with one great power—against the risks of defying the other and facing retaliation. In this way, NAS shifts the state’s strategic thinking from managing two separate bilateral relationships to navigating a single, interconnected triangle. This helps identify the causal trigger often missed in the hedging literature: what drives alignment strategies is not just a rising power or great power rivalry, but targeted coercion that compels states to reveal their alignment position.

ALIGNMENT DILEMMA

While existing scholarship on hedging and balancing provides valuable insights into how states navigate uncertainty and threat, it often fails to specify the causal trigger that compels states to clarify their positions towards rivaling great powers. This is evident in how much of the hedging literature frames hedging as a risk-management strategy aimed at preserving autonomy and keeping future alignment options open amid uncertainty (Goh, 2007; Haacke & Ciorciari, 2022; Kuik, 2021), and how BoT emphasizes the role of threat perceptions in shaping alliance behavior (Walt, 1985, 1990, 2025). However, these approaches tend to treat alignment as a reaction to structural pressures or perceived risks, without specifying what triggers the need to choose sides.

The concept of the alignment dilemma builds on this literature but introduces a refinement: it identifies NAS as the causal mechanism that turns regular trade-offs into a triadic dilemma requiring positioning amidst great power competition. In doing so, it provides a clearer link between threat perception and alignment behavior. Building on this, the alignment dilemma refers to the challenge states face when managing the security or economic trade-offs involved in engaging with multiple great powers. In this sense, the dilemma is not triggered by a rising power or great power rivalry itself, but by the state's perception of NAS.

We argue that the alignment dilemma arises when a third state perceives that one great power is likely to constrain, or is already constraining, its engagement with a rival through coercive means. This perceived threat may take the form of a latent concern about the possibility of future coercion or a reaction to the active application of pressure. What matters is not necessarily the actual application of pressure, but the perception of NAS. This alters the structural environment: it raises the perceived costs of engaging with great powers. The dilemma appears when the state sees favorable economic or security trade-offs with multiple powers but fears punishment for doing so. In this way, the alignment dilemma reflects a shift in the perceived cost structure of foreign policy, and emerges from the anticipation or experience of coercive alignment pressure.

In the absence of NAS, states may still confront complex trade-offs, but not an alignment dilemma—and thus not alignment strategies. In a unipolar order, trade-offs usually occur within the relationship with a single dominant power, often balancing security and economic considerations (Acharya, 2014; Ikenberry, 2018). In bipolar or polarizing systems, opportunities for third states may even expand (Fortin et al., 2023; Heine et al., 2025), provided neither great power restricts engagement with the other. Under such conditions, the system resembles what Acharya (2014) terms a multiplex world: a decentered order in which multiple sources of authority create structural opportunities for states to diversify partnerships.

Not all threat perceptions generate alignment dilemmas. A third state may view a rising power as threatening and respond by adjusting its trade or security policy—for example, by reducing economic dependence or enhancing military deterrence—without altering its relationships with other powers. This is a typical BoT response (Walt, 1990), not to an alignment dilemma. The key distinction lies in whether the state perceives a coercive attempt by one great power to influence its behavior toward another. Threat perception alone may result in bilateral trade-offs, or even alignment trade-offs—that is, situations in which engagement with one great power creates potential costs in the relationship with another. However, such *trade-offs* do not necessarily produce an alignment *dilemma*. The dilemma arises only when these trade-offs are perceived as coercively imposed—when the state believes that deepening engagement with one great power will provoke retaliation from the other. For example, a government weighing Huawei's role in its 5G network may make security-economic trade-offs, but a dilemma emerges only when it perceives US threats to withdraw intelligence cooperation. In this context, the perceived threat of NAS transforms alignment trade-offs into a forced alignment

decision, compelling the state to adopt an explicit positioning it would otherwise avoid.

Table 1:

From Trade-Offs to Dilemmas: The effect of Negative Alignment Statecraft

Concept	Description	Example
Bilateral Trade-Offs	The state manages costs and benefits independently in each bilateral relationship. These trade-offs may occur with both great powers but do not affect one another.	Increasing defense ties with the US while maintaining economic ties with China, as separate tracks.
Alignment Trade-Offs	The state perceives that engagement with one great power may provoke losses in its relationship with the other. The trade-offs are now interdependent. NAS (alignment stick) is not necessarily present.	Choosing a Chinese cloud provider while fearing US retaliation, without NAS.
Alignment Dilemma	The state, wanting to engage with multiple great powers, perceives alignment trade-offs through NAS.	US threatens to reduce military cooperation if the state adopts Huawei 5G antennas.

Source:

Elaborated by the authors

This distinction matters analytically. In the absence of NAS, states may still balance, hedge, or bandwagon, but these are better understood as responses to threat perceptions—in line with BoT—rather than alignment strategies. That is, they are not reactions to coercive pressure constraining engagement with a rival (NAS), but rather to trade-offs in their relations with great powers. For instance, a state may deepen trade with a threatening rising power while continuing to cooperate with the hegemon, so long as the latter does not object—no dilemma arises. But once a great power seeks to constrain that engagement, the state faces a strategic choice: comply or resist. Thus, it is NAS that transforms an environment of opportunities and manageable trade-offs into an alignment dilemma. It is not rivalry, nor even threat perception, but alignment coercion that triggers the dilemma.

ALIGNMENT STRATEGIES

Once a state faces an alignment dilemma, its foreign policy behaviors—balancing, hedging, or bandwagoning—take on a different character. What were previously routine responses to bilateral trade-offs or even alignment trade-offs now become alignment strategies: deliberate efforts to manage the costs of engaging with multiple great powers under the threat of NAS. The logic behind these strategies is no longer shaped by independent calculations about each relationship, or even by the perceived interdependence alone, but by the threat of pressure limiting engagement with one great power in favor of the other. In other words, it is the presence—or anticipation—of alignment sticks that transforms familiar behaviors into alignment strategies. A trade deal or security pact with a great power is no longer just a self-contained bilateral choice—it becomes part of a broader strategic positioning. The state is forced to weigh each move not only for its intrinsic value, but for its potential to provoke coercive responses from a rival great power. In our framework, it is not the outward form of the behavior that defines alignment, but its function: these behaviors become alignment strategies only when adopted in response to alignment threats.

Hedging, for example, can occur in both coercive and non-coercive environments. In the absence of an alignment dilemma, a state may engage with multiple great powers to pursue specific goals—such as investment, technology transfers, or military cooperation—without implying a deliberate position in the broader rivalry. These trade-offs—whether bilateral or interdependent—are handled separately and do not compel the state to take sides. However, when a great power applies alignment coercion to limit the state's engagement with its rival, a hedging response becomes an alignment strategy. It no longer reflects general risk management or pragmatic engagement, but a calculated effort to manage alignment dynamics under pressure—maintaining ties with both powers without fully siding with either. This is often done through a mixed approach, such as deepening security ties with one power while expanding economic links with another. In some cases, states may also adopt “non-decision decisions” that avoid clear public alignment while still reducing the rival’s influence—for example, by delaying regulatory approval or quietly excluding a vendor without an explicit ban (Krolikowski & Hall, 2023). In this context, hedging functions as an alignment strategy—a response to coercive pressure that seeks to preserve flexibility without fully committing to either side.

This same logic extends to balancing and bandwagoning. Outside of an alignment dilemma, they constitute baseline strategic behaviors: a state might balance against a regional threat to strengthen deterrence or bandwagon with a dominant power to secure material gains. Such actions, while important, remain distinct from alignment strategies. Their logic is shaped by specific threat perceptions or opportunity-seeking, not by coercive constraints on engagement with rival powers. Under conditions of alignment pressure, the meaning of these behaviors

shifts. In this context, balancing refers to resisting the coercer, while bandwagoning means submitting to the alignment coercion. With the alignment dilemma, these behaviors become deliberate responses to positioning pressure, constituting alignment strategies aimed at navigating trade-offs imposed by great-power coercive statecraft aimed at limiting the target's interactions with the rival power.

The focus on trade-offs challenges a common assumption in hedging literature: that states act to maximize autonomy. We argue this misframes the problem. Autonomy is not an outcome to gain or lose but a constant condition of sovereignty; what varies are the costs and consequences of exercising it (Narlikar, 2021). Hedging is therefore less about preserving autonomy than recalibrating choices under shifting incentives and threats. Our view aligns with Walt's (1990) BoT and Snyder's (1984) "Security Dilemma in Alliance Politics" but diverges from works that treat autonomy or flexibility as goals in themselves (Brun & Covarrubias, 2024; Lim & Cooper, 2015; Lim & Mukherjee, 2019; Marston, 2024; Zhao, 2025). Whereas Lim and Cooper (2015) see autonomy as a variable traded for security, we contend it is constant; alignment behavior reflects how states weigh trade-offs rather than a desire to avoid commitment. Alignment statecraft thus reshapes the costs of available choices rather than removing them.

RESEARCH QUESTION AND METHODOLOGY

Our hypothesis is that the perception of Negative Alignment Statecraft (NAS) transforms security and economic trade-offs into alignment dilemmas, compelling states to reveal their alignment strategies. To test this, we ask: how and why did Brazil, Chile, and Mexico respond differently to Chinese engagement in 5G/4G mobile antennas and data center infrastructure between 2018 and mid-2025? By examining variation across both countries and sectors, we aim to isolate the causal impact of NAS on their strategic choices.

This study adopts a qualitative, cross-sectoral comparative design, applying a most-similar systems logic (Gerring, 2004). Brazil, Chile, and Mexico faced comparable US and Chinese engagement, but responded differently across two domains. In 5G/4G, the United States exerted coercive pressure to exclude Chinese firms—a clear case of NAS. In data centers, by contrast, no comparable pressure occurred despite growing Chinese investment. This variation allows us to hold country-level factors constant while isolating NAS. We employ process tracing to reconstruct the causal sequence in each case, assessing whether and how perceptions of NAS activated the alignment dilemma and shaped policy responses (Bennett & Checkel, 2015). By comparing sectors with and without alignment coercion, we identify whether it is US statecraft—rather than China's rise—that triggers alignment behavior.

EMPIRICAL SECTION

This section compares the responses of Brazil, Chile, and Mexico to Chinese engagement in two

sectors of digital infrastructure: 5G/4G mobile antennas and data centers. The goal is to assess whether the presence or absence of Negative Alignment Statecraft explains the existence of alignment strategies across sectors and countries. Both sectors involve growing Chinese participation and strategic interest from great powers, but only in the 5G case did the United States apply coercive pressure to limit engagement with China. This contrast allows us to observe whether it is the rise of China or the application of alignment coercion that transforms routine trade-offs into alignment dilemmas—and whether states respond with alignment strategies only when such pressure is perceived.

5G/4G ANTENNAS CHINESE PRESENCE

By the time Latin American governments began planning for 5G, Chinese telecom firms like Huawei and ZTE were already well-established actors in national telecommunications networks. Their presence had expanded steadily over the previous two decades, especially during the rollout of 3G and 4G (Vila Seoane, 2023). In Brazil, Huawei became a key infrastructure provider for all major operators—including Vivo, Claro, TIM, and Oi—and was estimated to support nearly half of the country's 4G network (Carrelli, 2024; Van der Westhuizen, 2024). In Argentina, Chinese firms initially entered through rural connectivity programs but grew into central suppliers for the country's largest carriers. In Mexico, industry assessments suggested that a significant share of mobile data traffic flowed through Huawei equipment (Carrelli, 2024; Colombo et al., 2021).

This early and sustained presence was shaped by a combination of supply and demand factors. Chinese vendors offered adaptable technology, competitive pricing, and financing conditions that were attractive to governments and telecom operators across the region (Colombo et al., 2021; Vila Seoane, 2023). They also demonstrated a willingness to engage in long-term partnerships in markets often underserved by Western suppliers. Over time, this positioned them as reliable infrastructure providers. In Brazil, Huawei's stable performance and strong relationships with carriers allowed it to become a core part of the national network (Lia et al., 2024; Van der Westhuizen, 2024). In Argentina and Mexico, similar trajectories unfolded as governments and operators prioritized access, cost, and coverage in expanding digital connectivity (Carrelli, 2024; Colombo et al., 2021).

As a result, by the time 5G deployment became a strategic issue, Chinese firms were no longer peripheral actors—they were embedded in the telecommunications systems of several Latin American countries. Their infrastructure and technical expertise supported existing mobile networks, and in many cases, their equipment was already deployed in key parts of national systems. This structural context shaped the environment in which subsequent policy decisions were made. Whether governments continued working with these vendors or considered alternatives,

existing dependencies meant that shifting course involved significant technical and financial implications (Carrelli, 2024; Lia et al., 2024; Van der Westhuizen, 2024). These conditions laid the groundwork for the political dilemmas that would later emerge—not because of Chinese expansion itself, but because of efforts by external powers to constrain it.

THE PRESENCE OF NEGATIVE ALIGNMENT STATECRAFT

The rollout of 5G was transformed into a geopolitical stress test by a direct and coercive campaign initiated by the United States, which sought to persuade and compel countries to exclude Chinese technology firms from their networks (Van der Westhuizen, 2024; Colombo et al., 2021; Lia et al., 2024). This set of practices falls under our NAS characterization. The campaign was global in scope but was pursued with particular vigor in Latin America, a region Washington considers its traditional sphere of influence (Colombo et al., 2021). The core objective was to block Huawei and other Chinese firms from participating in national 5G networks, even where these companies were already deeply embedded in prior generations of infrastructure (Lia et al., 2024; Van der Westhuizen, 2024).

This US strategy was multifaceted, involving public statements, diplomatic interventions, and financial incentives. Washington's key message, repeatedly delivered by senior officials and embassies across the region, framed Huawei as a national security risk due to its alleged ties to the Chinese Communist Party and obligations under Chinese intelligence law (Colombo et al., 2021; Van der Westhuizen, 2024). In Brazil, the Trump administration explicitly warned that choosing Huawei could jeopardize the country's entry into the OECD and its access to intelligence sharing under the Five Eyes framework. Similar pressure was applied in Mexico and Chile, where US representatives stressed the security risks associated with Huawei and promoted participation in the "Clean Network" initiative (Van der Westhuizen, 2024). At the same time, the US also used Positive Alignment Statecraft. A USD 1 billion credit line was offered through a Memorandum of Understanding between Brazil's Ministry of Economy and EximBank, with 5G listed as a priority sector. In addition, US Ambassador Todd Chapman confirmed that the DFC could provide financial support to Brazilian telecom firms—conditional on excluding Chinese vendors and favoring companies like Ericsson and Nokia (Lia et al., 2024).

Overall, this US campaign constituted a clear case of Negative Alignment Statecraft. It aimed not just to influence vendor choices but to constrain third states' engagement with China through coercive pressure. By threatening diplomatic and economic consequences, the US transformed routine trade-offs into alignment dilemmas, forcing governments to reconsider established ties with Chinese firms. The Huawei case shows how it was not China's rise but US coercion that triggered alignment decisions.

ALIGNMENT STRATEGIES

The intense US pressure activated the alignment dilemma across Latin America, compelling states to explicitly hedge by maintaining ties with both Washington and Beijing while carefully managing the costs of coercive pressure. The outcomes in Brazil, Chile, and Mexico varied, but all reflect active attempts to navigate the dilemma posed by the US alignment coercion. In Brazil, the US campaign exposed a sharp divide within the Bolsonaro administration. An ideological faction, led by the president's son and the foreign minister, endorsed the US security narrative and pushed for a ban. They were countered by pragmatic military and economic officials who feared the costs of alienating China, Brazil's top trading partner (Colombo et al., 2021; Van der Westhuizen, 2024; Vila Seoane, 2023). The compromise allowed Huawei to participate in the 2021 5G auction but created a separate, secure government network from which Chinese vendors were excluded (Van der Westhuizen, 2024). This ambiguity signaled responsiveness to Washington's security concerns while assuring Beijing that its largest commercial partner was not barred from the market.

Chile responded by defending its tradition of open, non-discriminatory trade. Faced with US pressure, the government reframed the issue, rejecting a binary geopolitical choice and insisting on technological neutrality. Rather than banning a specific company, Chile adopted transparent technical standards that all vendors—Chinese, European, or American—had to meet (Makichuk, 2021; Vila Seoane, 2023). This was a direct rebuff to US demands. Chile's stance reflected a perception that coercive statecraft itself threatened its autonomy and foreign policy principles, echoing a long-standing regional view of Washington as a primary security risk (Van der Westhuizen, 2024).

Mexico illustrates a quieter, but deliberate, approach shaped by its deep economic ties to the United States. Publicly, the government maintained neutrality, declaring it would not exclude any firm (Christie et al., 2024). Yet in practice, restrictions appeared: Huawei was limited in border regions, reflecting security concerns and economic interdependence. The country's dominant carrier, América Móvil, built its 5G network primarily with Ericsson and Nokia, sidelining Huawei without a formal government ban (Carrelli, 2024; Berg & Ziemer, 2023). This outcome mirrored US preferences, driven not by threat perceptions of China but by the asymmetric costs of ignoring Washington's pressure.

The 5G sector reveals a consistent pattern: US deployment of NAS activated the alignment dilemma in Brazil, Chile, and Mexico, forcing calculated responses that broke with commercial logic. In each case, Chinese firms already had a strong presence, but it was not China's rise that shifted behavior. Instead, perceptions of US coercion—threats to autonomy, economic stability, or key bilateral ties—reshaped decision-making. Responses took different hedging forms: Brazil's partial accommodation, Chile's open defiance, and Mexico's quiet tilt toward Washington. Despite divergence, they shared a

common basis: a reoriented threat perception that placed US pressure—not Chinese expansion—at the core of the alignment dilemma. The consistent visibility of alignment strategies in this sector, where NAS was applied, offers a sharp contrast with the data center sector, where such pressure was absent.

DATA CENTERS CHINESE PRESENCE

The data center landscape in Latin America is characterized by a market where US providers have historically dominated but Chinese tech giants are establishing a growing presence. The region's digital infrastructure is concentrated in a few key hubs, with Brazil, Mexico, and Chile collectively hosting over 60% of Latin America's data centers (UNDP, 2025). While the market has long been led by American hyperscalers like Amazon Web Services (AWS), Microsoft Azure, and Google Cloud, Chinese firms such as Alibaba Cloud, Huawei, and Tencent have become increasingly active challengers, reflecting a broader global dynamic where Chinese hubs are contesting US dominance (Lehdonvirta et al., 2025). Their strategy involves building and leasing physical infrastructure to support their own global operations and to compete directly for the region's cloud business.

This expansion is not speculative but is marked by concrete investments across the three countries, which are the region's main data center markets. In early 2025, Alibaba Cloud launched its first data center in Mexico to serve both local and international clients (China Daily, 2025). Huawei is already operating two data centers in Chile and has announced further plans to invest in Brazil's market (BNAmericas, 2025; Reuters, 2025). Similarly, TikTok's parent company, ByteDance, is reportedly backing a large-scale data center project in Brazil, with local firm Casa dos Ventos receiving approval to move forward with construction (Skidmore, 2025). This pattern of involvement shows that, as in the 5G sector, Chinese tech firms are not just minor providers but key raising actors in the region's cloud infrastructure.

THE ABSENCE OF NEGATIVE ALIGNMENT STATECRAFT

In stark contrast to the 5G sector, the data center space in Latin America has been largely free from a comparable campaign of NAS. While the United States government did include a "Clean Cloud" component as part of its broader "Clean Network" initiative (Lehdonvirta et al., 2025), this policy did not involve the same direct coercive tactics toward third countries as those used in the campaign against Huawei's mobile antennas. There has been a noticeable absence of the high-profile public threats, explicit diplomatic pressure, or coercive conditionalities from Washington aimed at preventing foreign governments from allowing Chinese firms to build or operate data centers within their borders.

Consequently, the public and policy discourse surrounding data centers in these countries has remained largely detached from great power confrontation. Conversations in the region revolve around the enormous demand for electricity and water, the need for sustainable energy sources, the challenge of attracting foreign capital, and the importance of developing a stable regulatory environment to build investor confidence (UNDP, 2025). The dominant narrative is one of market competition and industrial policy, with the three countries openly courting investment from both US and Chinese firms to fuel their digital transformation. The issue has not been securitized in the same manner as 5G; instead, it is framed as a matter of economic development and digital sovereignty, particularly regarding data privacy and localization rules, a debate that is also central in other regions like Europe (Blancato, 2024).

ALIGNMENT STRATEGIES?

In the data center sector, governments did not face an alignment dilemma triggered by NAS. While the behavior of Brazil, Chile, and Mexico reflects internal priorities and available international options—in line with the assessments of Zhao (2025) and Kuik (2024) in other sectors—no great power sought to constrain their engagement in this domain. As a result, unlike in the 5G sector, the need to reveal a clear position amidst great power rivalry did not arise. Even as Chinese hyperscalers expanded, the absence of alignment coercion allowed governments to act based on domestic considerations, fostering multi-vendor digital infrastructure. Brazil encouraged investment from all major players, including both US and Chinese firms. Mexico welcomed Alibaba Cloud to diversify options. Chile continued its open-market approach, enabling competition shaped by domestic priorities. Regardless of how these choices might be characterized in terms of hedging strategies, they align with findings that cloud infrastructure decisions are shaped more by host-country strategies than by great power rivalry (Lehdonvirta et al., 2025).

This behavior represents the “control case” for this article’s framework. On the surface, there are no signs of deliberate or explicit alignment strategies like hedging, as decisions appear to be driven by commercial opportunities rather than coercive threats. Instead, state policies reflect a pragmatic pursuit of digital development, focused on attracting capital, fostering innovation, and ensuring regulatory stability. The question this raises, however, is whether alignment strategies are truly absent, or is it simply that we cannot see them without the clarifying trigger of a coercive act? This absence of observable alignment strategies in a sector where NAS is not present provides the necessary contrast to argue that it is great power statecraft, not simply the presence of Chinese technology, that makes international alignment visible and necessary.

ANALYSIS

The comparative evidence suggests a clear pattern: the visibility of alignment strategies depends

on the presence of NAS. In the 5G/4G sector, coercive pressure from the United States forced Brazil, Chile, and Mexico to confront alignment dilemmas, prompting a range of strategic responses. In contrast, in the data center sector—where no comparable pressure was applied—state behavior appeared to follow domestic preferences and sectoral incentives. This supports our hypothesis: alignment strategies become visible only when a coercive trigger compels states to navigate trade-offs between great powers.

This comparative highlights how the structure of trade-offs changes depending on the presence or absence of alignment coercion. States always retain the autonomy to choose; what varies is how the threat perception of NAS reshapes the cost structure of those choices. In the 5G case, NAS transformed manageable bilateral or alignment trade-offs into explicit dilemmas, forcing states to make observable alignment choices. In the data center sector, by contrast, no great power attempted to constrain third states' engagement with its rival, and the pattern of engagement appears shaped by domestic preferences and sectoral incentives, without explicit positioning amidst great power competition. But this does not mean that geopolitical calculations were absent. In the absence of NAS, states may still pursue alignment strategies, but without such a coercive trigger, these remain indistinct, unarticulated, or deliberately hidden.

This contrast raises a central analytical problem: in the absence of coercion, how can we know whether a state is aligning? A third state engaging both great powers may simply be hedging or diversifying, and the lack of observable alignment does not imply the absence of alignment. To address this ambiguity, we introduce Schrödinger's Alignment. Borrowing from the quantum metaphor, we suggest that without coercive pressure a state's alignment status exists in superposition—potentially pursuing a passive alignment strategy or none at all—until external pressure or deliberate signaling clarifies its position. As in the metaphor, intentions remain unobservable; alignment must be inferred from behavior and its interpretation. In polarized orders, even routine actions can be read differently: engaging a Chinese cloud provider may appear as diversification domestically but as defiance of US hegemony externally. In Latin America, where sovereignty and autonomy are highly salient, US coercive pressure has often reinforced perceptions that Washington itself—rather than Beijing—posed the greater threat.

This is the condition captured by Schrödinger's Alignment: alignment strategies may or may not exist but appear simultaneously possible depending on interpretation. Ambiguity persists until clear signaling collapses it. Even then, sectoral variation may sustain uncertainty. To guide the analysis, we assume: (1) polarization does not necessarily generate NAS; (2) polarization raises the likelihood of NAS, real or anticipated; and (3) the threat of NAS increases incentives for both passive and active alignment strategies. As shown in Table 2, passive and active alignments do not displace hedging, balancing, or bandwagoning, but their meaning depends on how clearly they are articulated and how this is interpreted by others. Hedging without NAS may be passive alignment—or none at all—while balancing and bandwagoning remain inherently explicit. The distinction lies not in the behavior but in its context: NAS pushes familiar strategies into explicit

alignment, while leaves their alignment status ambiguous. By decoupling alignment from specific behaviors and focusing on the conditions that give them meaning, the framework contributes to the analysis of state behavior under great power rivalry.

Table 2:

Behavior under Great Power Rivalry: From Trade-Offs to Active Alignment Strategies

Behavior	No Alignment Strategy (Driven by bilateral trade-offs; no Alignment Dilemma)	Passive Alignment Strategy (Response to the Alignment Dilemma without NAS)	Active Alignment Strategy (Response to the Alignment Dilemma triggered by NAS)
Balancing	Countering the threatening power in absence of alignment dilemma.	(Not applicable, as balancing is typically an explicit action.)	Countering the threatening power in response to the alignment dilemma.
Hedging	An explicit policy designed to engage with multiple powers in absence of alignment dilemma.	An implicit policy designed to engage with multiple powers in response to the alignment dilemma.	An explicit policy designed to engage with multiple powers in response to the alignment dilemma.
Band-wagoning	Capitulating to the threatening power in absence of alignment dilemma.	(Not applicable, as bandwagoning is typically an explicit action.)	Siding with the threatening power in response to the alignment dilemma.

Source:

Elaborated by the authors

CONCLUSION

This article has argued that explicit alignment strategies are not simply a response to great power rivalry or the rise of a challenger, but are triggered by a specific form of coercive practice: Negative Alignment Statecraft (NAS). When a great power applies economic or security pressure to limit a third state's engagement with its rival, it creates an Alignment Dilemma—a situation in which the state must weigh the costs of compliance against the risks of resistance. This dilemma compels states to clarify their positions and adopt explicit strategies such as hedging, balancing, or bandwagoning.

Our cross-sectoral comparison of Brazil, Chile, and Mexico illustrates this dynamic. In the 5G/4G antenna sector, the presence of sustained US coercion activated the alignment dilemma in all three countries, prompting observable alignment strategies. These responses—ranging from Brazil’s partial accommodation, to Chile’s defiance, to Mexico’s quiet alignment—were not routine foreign policy decisions. They were strategic efforts to manage trade-offs under coercive pressure. In contrast, in the data center sector, where no comparable pressure was applied, state behavior remained commercially driven and shaped by domestic development goals. Without NAS, alignment strategies—if present—remained implicit, latent, or indistinguishable from regular engagement with great powers.

This article makes three core contributions. First, it refines Balance of Threat theory by identifying NAS as the mechanism through which a great power’s “aggressive intentions” are operationalized in a triadic context. Second, it clarifies a persistent ambiguity in the hedging literature: while many studies describe how states seek to avoid alignment, few specify what triggers them to stop doing so. We argue that the onset or perception of NAS marks this turning point—transforming ambiguity into explicit alignment strategies. Third, we introduced the concept of Schrödinger’s Alignment to capture the epistemological problem that arises when no coercive trigger is present. In such conditions, alignment strategies may exist in a latent form, but cannot be distinguished from routine engagement without alignment coercion or deliberate signaling.

The findings also carry broader implications. NAS not only reshapes the cost structure of foreign policy choices—it can also undermine the very influence it seeks to assert. In Latin America, where concerns about sovereignty and autonomy remain salient, US pressure often generated perceptions that Washington itself, rather than Beijing, posed the greater threat. This dynamic complicates the foundations of regional order and may strengthen calls for Active Non-Alignment—not just as a normative project, but as a response to being caught between competing powers.

Ultimately, this article argues that alignment is not a structural outcome but a reaction to a specific form of statecraft. By identifying NAS as the trigger of alignment strategies, and by theorizing the ambiguity that persists in its absence, we offer a framework that helps explain when alignment behavior becomes visible, and why it often remains obscured. Future research could examine how Alignment Statecraft operates across different sectors, its regional effects, and the role of domestic factors in mediating responses. In a world increasingly shaped by coercive statecraft, understanding why and how states align remains a central task for international relations analysis.

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