



Bolivians, protesting for access to the ocean on 3 August 2015 in La Paz, Bolivia, hold signs reading “The ocean will return to Bolivia.” Bolivia lost its coastal territory after being defeated by Chile in the War of the Pacific (1879–1883). It has argued for decades that it should be allowed sovereign access to the ocean, through which it could export its natural gas. Bolivia currently has nearly free ocean access, paying transport costs but no tariffs to export some 1.6 million tons of cargo through Chile’s ports each year, including nickel, lead, silver, and tin from Bolivia’s mines. (Photo by David Mercado, Reuters)

# Strategic Assessment of Bolivia’s Defense Policy

Cristián Faundes

Considering Bolivia’s dramatic economic growth over the past decade, as well as the increasing sophistication of its defense policymaking process, it seems appropriate to make an assessment from a strategic point of view of its available military resources and current doctrine as they may pertain to achieving its future national policy objectives. This analysis is timely, considering Bolivia’s increasingly strident claim to a sovereign outlet to the Pacific Ocean as a permanent national objective. One such policy of concern reflects

Bolivia’s interest in expanding its territory by reclaiming portions of the Pacific coast it ceded to Chile in a past war that is currently part of sovereign Chilean territory. To conduct this analysis, the *ends, ways, and means* formula will be used to synthesize the concept of strategy that predominates in the hemisphere.

Bolivia, under President Evo Morales, has recently achieved an unparalleled level of political stability and economic growth in its history. This progress has gone hand in hand with the emergence of a new elite that took

political power in 2006 with a firm will and determination to transform the country by consolidating for the first time thirty-six ethnicities in an attempt to establish a genuine plurinational state.<sup>1</sup> To achieve this, new policy foundations are being established, which in turn are generating a new institutional framework of governance. With Morales's reelection at the end of 2014 and his assumption of a third term in office in January 2015, these types of policies that aim at consolidating a plurinational state are projected to continue for another five years.<sup>2</sup>

Given these developments, it seems prudent to make an assessment of Bolivia's defense policy as it relates to its geographical neighbors from a strategic point of view following the model developed by Arthur Lykke, which is based on the ends, ways, and means formula.<sup>3</sup> Such an assessment is especially germane because of the recent resurgent Bolivian claim that it is morally and legally entitled to restoration of territory ceded by Bolivia to Chile after a war fought more than a century ago. The area is currently part of Chile, but Bolivia demands sovereign access to the Pacific Ocean and requires that the outlet be useful to harbor a port.

Reasserting this territorial claim has been institutionalized as a major Bolivian strategic objective as is evident in essential Bolivian strategic-level documents such as: *Plan Nacional de Desarrollo* [National Development Plan] (2007); *Constitución Política del Estado Plurinacional de Bolivia* [Political Constitution of the Plurinational State of Bolivia] (2009); and *Bases para la Discusión de la Doctrina de Seguridad y Defensa del Estado Plurinacional de Bolivia* [Framework for the Discussion of Bolivian Security and Defense Doctrine] (2010). A clear articulation of this policy is found in the National Development Plan, as follows:

Bolivia has declared its maritime integration to the Pacific coast a permanent objective of its

foreign policy, based on historical and judicial rights. This reintegration is justified due to commercial, economic, and political impera-

tives as well as access to the exploitation of marine resources.<sup>4</sup>

The national strategic objective of regaining previously ceded territory and gaining a sovereign corridor to the Pacific Ocean is also evident in the restructuring of the government's administrative bureaucracy that established, under the guidance of the Ministry of Foreign Affairs, the Maritime Restitution Board as well as the Strategic Office for Maritime Restitution (both created in April 2011), and the publication of *El Libro del Mar* [The Book of the Sea] (2014).<sup>5</sup>

Other contributing elements that suggest a need for monitoring Bolivian steps to achieve this object are internal changes occurring in Bolivia noted below:

- The rapid growth of Bolivia's gross domestic product (GDP), in fifteen years has increased 360 percent, reaching US\$30.601 billion in 2013, which enables more aggressive policy initiatives.<sup>6</sup>
- Bolivia's rapidly increased defense budget over a six-year span from 2008 to 2014, almost doubling with a 93 percent increase.<sup>7</sup>
- Bolivia emergence as China's fifth-largest weapon-systems buyer, reaching US\$289 million, just behind Pakistan and Bangladesh.<sup>8</sup>
- Changes in published national defense policy that emerged from the 2004 *White Paper on National Defense*.<sup>9</sup>

According to what has been shown so far, and following Lykke's formula and definitions, an assessment of the main guidelines of Bolivian defense policy will be conducted as follows: the *ends* make up the objectives, the *ways* become concepts that are established in order to obtain those objectives, and the *means* become



A 2012 postage stamp issued by the Bolivian government with a map showing Bolivia's former coastal access to the sea. At the top of the stamp, a text line reads, "Bolivian coastline seized by Chile in 1879." At the bottom of the stamp, the text line reads, "Bolivia reclaims its pathway to the sea." (Photo courtesy of Cristián Faundes)



Bolivian Navy military police march 7 August 2008 during a military parade in Cochabamba, Bolivia. (Photo courtesy of Wikimedia Commons)

resources on which the concepts are based. In this sense, we also incorporate salient perspective from H. Richard Yarger, another notable military scholar, who observes that a valid strategy should incorporate a balanced assessment of ends, ways, and means; otherwise, the success of the strategy would be at risk.<sup>10</sup>

## Ends

The Bolivian constitution extends the traditional primary mission of the Bolivian armed forces to encompass internal aspects related to social and economic development as well as political stability. It establishes as its fundamental mission “to defend and preserve the country’s independence, security, and stability, as well as its honor and sovereignty; ensure the Constitution as the supreme rule of law, guarantee the stability of a legally established government, and participate in the comprehensive national development of the country.”<sup>11</sup> Though the Plan for National Development reaffirms the previous armed forces missions, it goes even further by assigning to the defense sector the task of supporting socioeconomic inclusion as well as fighting against poverty.<sup>12</sup> Consequently, the framework for the *Discussion of Bolivian Security and Defense Doctrine* determines four security and defense objectives:

- ◆ *Integral security and defense.* Ensuring the sovereignty and independence of the Nation, protecting

the territory and its population, and defending its strategic natural resources against domestic and foreign threats.

- ◆ *Participation in the Nation’s comprehensive development.* Increasing defense sector involvement in the country’s overall development to improve the quality of life of Bolivians.
- ◆ *Integration and peace.* Promoting regional and global integration and peace in the defense sector.
- ◆ *Civil defense.* Developing an optimal and diverse infrastructure in this sector.<sup>13</sup>

In this regard, it is noteworthy that Bolivia’s *White Paper on National Defense* promotes the claim for sovereign access to the Pacific by designating it as a permanent national objective.<sup>14</sup> Consequently, it incorporates “defeating any resistance that opposes the attainment of the national objectives” among the goals of the defense sector.<sup>15</sup> The document overtly shows that Bolivian defense policy rests upon such aspirations, notably asserting a commitment “to stand firm in our unwavering desire to return to the Pacific with sovereignty.”<sup>16</sup>

All of the aforementioned points frame a policy geared toward the expansion of the country’s borders using whatever means possible. What has been recently highlighted is reinforced in the *Framework for the Discussion of Bolivian Security and Defense Doctrine*, in which the state’s objectives include “promoting



maritime restitution with sovereignty,<sup>17</sup> as a vital objective for the development of the country.<sup>17</sup> President Evo Morales referred to this objective in a direct and explicit way during a speech given to the Legislative Assembly on 22 January 2011: “Atacama belonged to Bolivia before. It is true. We hope to recover it soon.”<sup>18</sup> It must be pointed out that Atacama, the name of the territory in question, is one of Chile’s fifteen political-administrative regions (specifically, the third), and it has a surface area of 75,176 km<sup>2</sup> (equivalent to Panama’s territory).

## Ways

Bolivian defense policy incorporates the armed forces in internal and external security tasks, which in practice takes the form of an emphasis by the armed forces on support of internal development, public safety, and the fight against drugs and contraband. In this context, the Morales presidency has expressed its desire to formulate a defense policy “with the aim of reestablishing and strengthening its institutional capacities.”<sup>19</sup> Therefore, it is developing a series of plans and programs geared to equip and modernize the armed forces; establish



control of the territory; support economic and social development, including socioeconomic inclusion as well as the fight against poverty; carry out health and educational campaigns with military participation; provide support to the civilian population in emergencies and catastrophes; support the development of borders; and support environmental protection and preserve cultural heritage in protected areas.<sup>20</sup> Added to this, in 2010, a series of initiatives were created to optimize the armed forces' joint operative structure and their strategic deployment; encourage a culture

The Bolivian Armed Forces formally receive thirty-one armored vehicles from the People's Republic of China as part of a military support agreement in a ceremony held 29 July 2016 in La Paz, Bolivia. (Photo by Daniel Espinoza, Bolivian Information Agency)

of respect toward human rights; establish the armed forces as the protector of democracy and the state's institutional framework; strengthen the state's civil defense system; strengthen the defense sector's projects in support of the state's productive undertakings; and strengthen regional military integration for security and defense purposes, among others.<sup>21</sup>

From a military point of view, Bolivia does not at present appear to contemplate a near-term scenario involving initiating military aggression outside its borders, even though it identifies a potential situation of conventional aggression against it, to which it has adopted an uncommon military defense model of joint responsibility, both military and civilian.<sup>22</sup> This two-dimensional concept consists of the following:

- The use of conventional military force under the joint use of flexible units; and,
- If the scenario of an aggression with superior fire-power arises, the conventional military force is to be modified and directed to avoid direct combat in order to gain more nonconventional maneuvering freedom in an irregular warfare scheme, adopting the so-called “Doctrina de Republiquetas,” which makes the citizen a soldier of the state.<sup>23</sup>

In other words, Bolivia—aware that it is a poor country that would have a difficult time supporting or sustaining a conventional fight—appears to be contemplating an insurgent scenario against potential adversaries. One result is interesting work is being done to strengthen the Bolivian Special Forces, who specialize in unconventional warfare.

The direction of such developments should be evaluated and monitored in light of the stated policy of maritime restitution that has a prominent place in the concept of defense as it is curiously expressed in relation to the national development environment: “when maritime restitution becomes a vital aspiration for the development of Bolivia, the State sees the imperious necessity to maximize the necessary diplomatic efforts that enable the use of oceans and seas worldwide, with the purpose of obtaining economic development and enjoying the benefits that these related activities generate.”<sup>24</sup>

## Means

With regard to assessment of means available to achieve strategic objectives, it is noteworthy that Bolivia’s defense budget’s accelerated growth is directly related to the rise in GDP. Therefore, at present, improvements in the defense sector can take place without noticeable effect to funding of other projects related to the country’s development. In fact, the defense budget remained between 1.5 percent and 1.7 percent of the country’s GDP between 2008 and 2014. In this sense, we can conclude that, without an unusual perceived threat in Bolivia, this rate should remain stable in the short- and mid-term.

Expanding on this, if we consider that the government’s objective is to reach a GDP of U.S.\$100 billion in 2020, then it is possible to project a defense budget of U.S.\$1.5 billion.<sup>25</sup> Taking into consideration that Bolivia’s defense budget in 2014 was U.S.\$490 million, then by analyzing GDP growth, we can estimate that Bolivia could triple its defense budget in the next five years.<sup>26</sup>

With regard to how Bolivia has targeted the rising funding available to the defense sector, the focus has thus far been on improving the conditions of the troops, quarters, and wages. The investment projects’ objective has been to improve the troops’ living conditions as well as to invest in the military units on the country’s borders.<sup>27</sup> According to what the minister of the presidency, Ramón Quintana Taborga, has highlighted, 80 percent of the armed forces budget is earmarked for paying wages.<sup>28</sup> The goal of improving wages is to reduce inequality in the ranks. For example, in 2009, there was a wage increase of 26 percent for low-ranking soldiers, and in 2012, there was an adjustment of 8 percent for sergeants.

Improvements notwithstanding, as previously alluded to, Bolivia lacks the material warfighting capability to conduct sustained conventional operations, including lacking such systems as capable radar systems and effective interceptor and air defense aircraft. The capabilities they do have remain at the low end when compared to the capabilities of its neighbors. As a result, Bolivia’s military is currently incapable of sustaining conventional offensive operations, night combat, and even maneuver against better funded and more technologically capable adversaries.<sup>29</sup> Compounding its lack of technological and material warfighting capability, due to the relative weakness of the defense sector’s industrial base, the focus of which has primarily been supporting development (except the Navy’s shipyards), Bolivia is heavily dependent on imported replacement parts, ammunition, and other war-making material in general.

This lack of conventional capability stems in part from an emphasis on material acquisition decisions that aim instead at supporting the development of dual-purpose capabilities that could be applied to both unconventional warfare as well as the requirements of domestic law enforcement, including those required to support the fight against drugs and contraband, emergency and rescue situations, operations against border crimes, and the patrolling of regions with public safety issues.<sup>30</sup> Such dual-purpose efforts are useful in

strengthening the country's Special Forces unconventional warfare capabilities, which, it should be observed, is a traditional way underdeveloped countries prefer to fight wars, and which have sometimes been very successful in achieving objectives.

## Final Considerations

Bolivia's defense policy explicitly outlines diverse purposes that broaden the traditional concept of the military by assigning tasks to the armed forces that support internal security, political stability, economic and social development, and public safety. Such tasks respond ultimately to the urgent needs of one of Latin America's poorest countries, but they also significantly extend the military's range of action, basically exercising its logistical and organizational capabilities.

Consequently, the defense policy is structured from diverse concepts that seem to blur the notion of purely military effort and expand the focus on what is ultimately one of the nation's root problems, the development of the country in general terms. In this sense, no matter how much of a correlation exists between ends and ways, an imbalance can be perceived, in Yarger's terms, by paying attention to the essence of the armed forces and the utility of military means, which depend on the military contribution's efficiency and efficacy in the

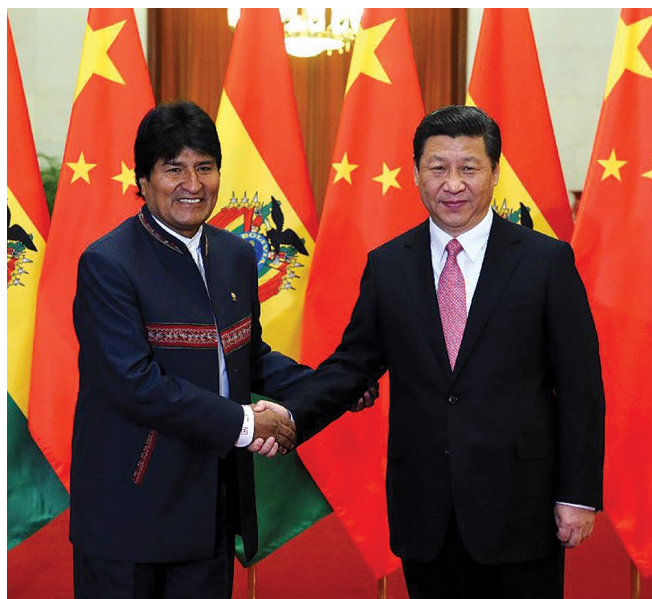
extension of such involvement into what has otherwise been regarded as the purely civilian sector of the society.

From a different perspective, one can appreciate that the country's current conditions for development prevent Bolivia from designing a force projection capability. Therefore, it employs its military resources to aid internal development; however, as long as its maritime aspiration to have a free, useful, and sovereign outlet to the Pacific Ocean through Chile remains, Bolivia's defense sector will

have to adjust its policies to generate concepts that will enable the attainment of such an objective and will be expected—as a matter of policy—to be developing the necessary means to make this happen as a policy option. The opportunity for such an adjustment stems from the fact that the country is growing like never before, which makes it possible to project a defense budget increase of 300 percent in the next five years.

Finally, as previously noted, the principal weapons supplier to Bolivia is the People's Republic

of China. Consequently, the direction of Bolivia's policy with regard to reasserting control over Atacama could plausibly invite a somewhat more ominous dimension to the issue that should be of singular possible concern to the hemisphere in general, and that is the strengthening of its relationship with its ideological and strategic ally, the People's Republic of China. ■



Chinese President Xi Jinping welcomes Bolivian President Evo Morales during a ceremony 19 December 2013 prior to their meeting at the Great Hall of the People in Beijing, China. (Photo courtesy of Ministry of Government of Bolivia)

## Biography

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## Notes

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**J**ames R. Locher III was the principal intellectual and administrative force behind the 1986 Goldwater-Nichols Act that resulted in revolutionary improvements in joint planning and operations among the services and within the Department of Defense overall. In the hope that a comprehensive similar reform could be made across the government among the many agencies responsible for national security, Locher went on to lead an intense research and lobbying effort by the Project on National Security Reform (PNSR) to promote broader reforms aimed at mitigating the current dysfunctional national security system. For more than five years, the PNSR staff analyzed sources of inefficiency and formulated fixes to transform the system for twenty-first century challenges. However, despite initial interest by the Obama administration (which later waned), the production of a great number of intellectual products, and support by a vast number of distinguished representatives of government, academe, and the military, the PNSR could not

rouse enough sustained support to overcome institutional parochialism and inertia to bring about transformation. In his final message at the close of PNSR operations 31 December 2011, Locher attributed failure to effect what he asserted are vitally needed reforms to “two principal obstacles ... [government] denial about the seriousness of shortcomings in the national security system and lack of political will to fix these shortcomings.” The recommended article, “National Security Reform and the 2016 Election,” was penned in part by one of the principal researchers formerly employed in the PNSR effort. It discusses why the PNSR effort failed and why the issue of failure to conduct comprehensive national security reform remains a vital and largely unaddressed issue that increasingly poses a threat to the national security of the United States by not addressing anachronistic and dysfunctional features embedded in the system. The article may be accessed at the following address: <http://ndupress.ndu.edu/Portals/68/Documents/stratforum/SF-293.pdf>



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### National Security Reform and the 2016 Election

By Christopher J. Lamb and Joseph C. Bond

**T**here are few issues of greater intrinsic importance to the United States than national security reform—or one riper for resolution. Twenty years ago most senior leaders were skeptical of allegations that the national security system was “broken”; they believed the system functioned well enough to manage the Nation’s most pressing problems. Since then numerous prominent experts have been sounding the alarm from inside the system and from without.<sup>1</sup> No fewer than nine blue-ribbon groups have argued in favor of system reforms (see tables 1 and 2).<sup>2</sup> The overwhelming majority of scholars publishing independently on the issue favor reform.<sup>3</sup> During the 2008 Presidential election, the momentum in favor of national security reform was so strong that many thought it was inevitable. This presumption was reinforced when President Barack Obama appointed well-known proponents of reform to senior positions in the National Security Council staff, Department of State, Department of Defense (DOD), and Intelligence Community.<sup>4</sup> Yet reform did not take place during the Obama administration, and so far it has not been an issue in the 2016 Presidential race, either. This paper examines why reform was sidetracked, whether it could emerge as a campaign issue during the 2016 Presidential election, and why it is in candidates’ and the Nation’s interest that it does.

### The Case for Reform

Before identifying reform obstacles, it helps to provide context by explaining the scope and definition of the topic and summarizing the arguments in favor of reform. The term *national security system* means the group of interacting, interrelated, and interdependent U.S. national security institutions that form a complex whole to provide critical security functions, including strategic warning, strategy, resource allocation, issue management, capability-building, system management, and performance oversight from the President and Congress down to personnel

### Key Points

- ◆ Over the past 20 years, there has been a sea change in senior leader views on national security reform from skepticism to support. Nine major studies argue the national security system cannot generate or integrate the capabilities needed to manage security problems well. The system is “broken.”
- ◆ Yet there are major obstacles to reform. Inexperienced U.S. Presidents discover system limitations too late, when it is politically difficult to correct them; experts who have not studied system behaviors underestimate their liabilities; and leaders in the Department of Defense are more likely to favor reform than their counterparts in other departments, which creates a bureaucratic backlash against reform.
- ◆ However, two key prerequisites for success are in place: galvanizing cases of unsustainable performance, and in-depth problem analysis that reveals the origins of the same. A third prerequisite is committed leadership. With that in mind, the authors identify several reasons why Presidential candidates should embrace national security reform during the 2016 campaign.

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