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TAUSSIG: Welcome to the Brookings Cafeteria Podcast. My name is Torrey

Taussig and I am a nonresident fellow in the Center on the United States and Europe at

Brookings. This episode is the second in a four-episode series called "Democracy and

Disorder," a new project in the Foreign Policy Program at Brookings that looks at critical

challenges to democratic states and institutions in a new era of great power competition

and offers ideas for what to do about them.

This episode will focus on democracy in East Asia. And with me in the studio are two contributors to the project: Mireya Solís, who is the Director of the Center for East Asia Policy Studies and the Philip Knight Chair in Japan studies at Brookings. And Jonathan Stromseth, the Lee Kuan Yew chair in Southeast Asian Studies and Senior Fellow in the Center for East Asia Policy studies at Brookings.

Welcome to the program, Mireya and Jonathan.

SOLIS: Thank you. Pleasure to be here.

TAUSSIG: So, to start off this, is a fascinating time to talk about democracy in East Asia. It's a region that is critical to economic growth globally, and we've seen unparalleled economic growth in the region over recent years. It is also home to a remarkable diversity of political regimes, economies, religions. Some of the most successful and democratic countries are in East Asia. But it is also, of course, home to non-democratic regimes that can claim political stability and economic growth, foremost among them being China. Then we have the increasing U.S.-China competition, which is increasing the risk of kind of geopolitical stability in the region as well. So, with all of these dynamics at play in the region at the moment, Jonathan to start with you, what do you see as the primary challenges to democratic states and institutions in East Asia?

STROMSETH: Well, it's a good question and I think in recent years that conventional wisdom in Southeast Asia or among watchers of Southeast Asia is that

democracy has really been declining in the region for several years. People point to a military coup in Thailand in 2014. President Duterte's drug war and extrajudicial killings in the Philippines. The dissolution of opposition parties and so on in Cambodia. Also, the rise of religious and political intolerance in Indonesia. And even the glow of Aung San Suu Kyi's historic electoral victory in 2015, which ended decades of outright military rule there, is dimming in the wake of the Rohingya crisis that we all know about and are concerned about.

And so, this this democratic decline, or it's sometimes called "regression to authoritarianism," is typically attributed to such chronic problems as corruption, weak electoral and judicial systems, high levels of inequality and so on. But there's also another lens that you can look at this from, and it's about you know a lens of durable authoritarianism. And we could look at its kind of from the other direction. And certainly, Vietnam and Laos, which have been one-party states led by communist parties for decades, is an example of that. Cambodia's prime minister Hun Sen has had an iron grasp on Cambodia for possibly, I think, since 1985. And also, Myanmar's military has a strong institutionalized position as well.

And then again you have kind of glimmers of democratic hope and practice. For instance, in Malaysia there was just a dramatic change in power, and Dr. Mahathir has come back in alliance with Anwar Ibrahim. And there are elections coming in Indonesia in April. And even the Thai military has called for elections next month in March, albeit within sort of constitutional parameters that will probably protect its entrenched political role. So, it's just a real set of crosscurrents, I would say, and it's mixed, as I think we'll talk about a little bit with greater competition and rivalry between China and the United States in the region, which I think is, you know, stirring the drink a little bit as well.

TAUSSIG: And Mireya, turning to Northeast Asia and particularly to your work in Japan, what do you see as the primary challenges facing democratic institutions and

norms, there, particularly to the open economic system and rule of law in the region?

SOLÍS: Thank you, Torrey. Northeast Asia is an economic powerhouse rife with geopolitical tensions. In this corner of the world you have the second and third largest economies. You also have the core of the global supply chain that powers international production and any major international trade. But what's really, I think, important to note is that you have all this economic activity taking place in a neighborhood that is growing more and more dangerous. Some hotspots that come to mind right away are of course the Korean peninsula with Kim Jong-un refusing to denuclearize. You have the rising tensions in cross-Strait relations, and of course you have the continued efforts by China to challenge Japan's administrative control over the contested islands.

So, in my mind one of the trends that really animates this Democracy and Disorder project is that we're trying to grapple with what are the consequences of the rising influence of authoritarian powers. And I would say that Northeast Asia is Exhibit A when we tried to ascertain what are the dynamics of this, what are the consequences of this. Obviously, it's about China's rapid military buildup. It's about its growing economic clout and the severe power gap that this creates vis-à-vis its neighbors.

But I would say that it's not just China. I mean, think about the fact that you have the leader of one of the countries with the worst records in terms of abusing human rights basically driving diplomatic summitry in the region in the past few months, and having just gone through the second meeting with President Trump. So, another very important element here when we are talking about the state of play of democratic states and the rising influence of authoritarian countries is that it's not all dire picture. You also have to take into account that Northeast Asia is home to three of the most important consolidated democracies in the region. We're talking about Japan. We're talking about South Korea. We're talking about Taiwan. But here too there's a wrinkle, because democracies do not always get along. And I think in the past few months we're witnessing a very sharp

decision by the Supreme Court of South Korea against Japanese companies regarding these claims for wartime labor compensation carries very significant risk of a rift between the two countries because this will actually touch on the economic ties that have been a bond in what has been a long, fraught bilateral relationship. And there is in general lack of trust between the two countries. And this means that there's not going to be strong coordination among democracies that are treaty allies of the United States.

My last point in these overall pictures come to the role of the United States in the region. President Trump is very skeptical of alliances and of free trade. Those are the foundations of Asia's stability and prosperity. And what will be the end result of this? Will he undermine, undercut the alliance structure in the region? Will we divert to a situation of rampant protectionism? It's not just a tit-for-tat trade war with China, but the fact that he has invoked national security to impose tariffs on our treaty allies and our closest partners. So how this all plays out in the region and what are the consequences is something that we really have to keep an eye on.

TAUSSIG: And what's interesting about both of your remarks about the dynamics, the democratic internal dynamics, within Southeast Asian and Northeast Asian countries and the geopolitical currents at play really show that East Asia in many ways will be at the forefront in coming years of this struggle for democracy in the new geopolitics in this contested international arena. So, it's interesting to see how these dynamics, both internal and external, are playing out.

So, Mireya, in your paper for the Democracy Series on Japan you write that compared to other advanced democracies in the West afflicted by rising populism, the Japanese polity appears in good health. And how do you think Japan has been able to escape the deep polarization of populism and the temptation of economic nationalism that has made inroads elsewhere and particularly in Europe?

SOLÍS: During the past six years Japan has enjoyed political stability, moderate economic expansion, and has stepped up its diplomatic game. And this is in sharp contrast to what was happening in Japan just a few years ago where every year you would have a different prime minister, where the country had been gripped by deflation for the longest time. This relatively strong performance of Japan over the past six years is also in sharp contrast, as you were saying, Torrey, with the United States and the U.K. who have been gripped by polarizing divisions at home, that have had profound consequences for their international role—the United Kingdom breaking away from the European Union, the United States distancing itself from all bilateralism.

So, I think this is really a fascinating question, why hasn't this populist fever taken over Japan, deciding its future in the way in which it seems to be happening in industrialized West? Very complex question, and there's not just one factor. I'll just highlight very briefly three elements that I think are very important.

One is that the globalization of China has not generated the same backlash in Japan that this has generated in the United States or other industrialized countries. Japan has very much been impacted by China's emergence as this huge export powerhouse. But you do not have the debate that we've had here about the so-called China trade shock. People in Japan are not blaming China for the loss of factories, for the loss of employment. And this has to do with a very complementary pattern of international trade between these two countries, and that has to do with the global supply chain. So, very interestingly, regions in Japan that trade more intensively with China report job growth, not job loss. So, I think that's an important element.

The second has to do with income inequality, again another major grievance driving populist movements in the West. Japan has seen levels of income inequality rise but the drivers are different. Japan does not have this so-called 1 percent phenomena. You do not have this extreme concentration of wealth in the upper echelons of society. So that also

creates very different dynamics.

And the last element has to do with political competition. Ten years ago, Japan embarked on an experiment. When the opposition party, who was running on an antiestablishment campaign, finally won the general election. The issue though is that that experiment did not go well. And after three years they were voted out of office and voters still have very bitter memories about the paralysis of decision-making that characterized those years in Japan. And this has created tremendous influence for the establishment parties in Japan—the Liberal Democratic Party and its coalition party, the Buddhist-led party, Komeito. So, I think that all these things begin to give you an idea of why Japan has not experienced the turbulence of populism and people in Japan are very aware that they require an open economic system for that prosperity. Again, demographic decline drives that point clearly.

TAUSSIG: So, would you say that Japan's political system, due to the reforms you just mentioned, is not experiencing the level of polarization as well as we're seeing foremost in the United States at the moment?

SOLÍS: Yes, you don't have that polarization. That does not mean that there are not issues with Japan's democracy; no democracy is perfect. And in fact, there are some risks at having so much instability in the sense that there's one dominant political ticket in Japan and that creates its own issues. You know, robust democracies require the possibility of alternation in power, require competing credible campaign platforms. But the opposition in Japan remains heavily fragmented. Parties usually do not last very long or they're constantly changing names, and so you have a disheartened opposition. That's one problem with Japanese democracy.

Another problem has to do with voter disengagement. Of late, Japanese elections are breaking records because they are having fewer and fewer voters actually turn out at the polls. And that means that people do not feel strongly motivated because they don't

see different options and therefore, they decide to stay home.

And lastly, I think that it's very important that we associate this period of Japanese stability, of a more proactive foreign policy, to the second term of Prime Minister Abe. But the problem is that you cannot have everything hinge on one political figure, and there is this huge question mark that opens when you think about Japan's future is what happens after Abe? Will Japan go back to the period of prime ministerial instability where again you have these constant turnovers at the top? Or will this stability continue but also the very proactive policy on international affairs or not?

TAUSSIG: Mireya, you've mentioned Japan's more activist foreign policy under Prime Minister Abe, and you've also outlined a number of elements of Japan's political and economic stability, and it's leading many on the outside to ask whether Japan armed with this political and social and economic stability can anoint itself a quote unquote guardian of the rules-based order in Asia. Do you think that Japan can fill the growing gaps in international governance to avoid increasing instability in its regional environment, especially as the United States and China take on different roles in the region?

SOLÍS: I think we're going to rely more and more on Japanese initiative. There are going to be limits of course as to what Japan can do. But one area where Japan has a lot of assets and can do much is in the area of international economic governance. You know, there have been a number of very important initiatives of late. I think a lot of people have been surprised as to what Japan was able to do in rescuing the Trans-Pacific Partnership, a trade agreement, after the United States left. But Japan has not stopped there. You know, Japan then has signed an agreement with the European Union that just covers a third of the world economy. And just today the news was out that Japan has updated its agreement with ASEAN countries to make it more ambitious in the rules area.

Then you have the trilateral effort that Japan has launched with the United States and the European Union, which I think is a much smarter way to try to get China to reform

and address some of the market distorting policies. You have Japan's activities in infrastructure finance which are very consequential. And then you also have this new initiative by the Japanese government to really codify rules at the global level on digital arena and data governance. We don't know how far Japan will take the latter. The last issue.

But nevertheless, what we don't see, Torrey, is the passive, inward-looking Japan anymore. And I think that in a moment where there is uncertainty as to how the United States will develop its foreign policy, its foreign and economic policy, and how the U.S. and China manage their growing rivalry, I think that a steady hand looks more and more appealing.

TAUSSIG: So, it will be interesting to see in coming years whether Japan does continue using its economic weight to advance these, both trade but also just rules-based agreements moving forward and in East Asia. So, when it comes to the issue of growing rivalry between the United States and China, Jonathan how do you see these dynamics, this growing competition of influence between the United States and China, playing out in Southeast Asia?

STROMSETH: That's a good question. And you know, as Mireya has already pointed out, Japan plays a very large economic role in the region, a very large role generally and we could perhaps come back to that. But I think the talk of the region now is really China's dramatic rise. And China has different tools in its toolkit, but I think economic statecraft is the one that most people are thinking about and observing. And by that, I mean it's employing kind of a combination of economic inducements, sometimes coercion, to advance its strategic objectives in the region. And the main platform for this, the example that everybody's talking about, is the Belt and Road Initiative. It has an estimated value of something like a trillion dollars, and it's really an ambitious effort to strengthen infrastructure, trade, and investment between China and other countries starting in Asia

and really now globally.

In Southeast Asia, that means railways, ports, pipelines. Malaysia and Indonesia have been particularly big recipients. China is also investing a lot in mainland Southeast Asia, the six countries along the Mekong: Cambodia, Laos, Myanmar, Thailand, Vietnam, along with China. And so that's really where a lot of their influence is growing as there, again, supporting infrastructure there especially hydropower. And so, for instance, in Cambodia, Beijing has become a real staunch supporter of the Hun Sen regime, which in turn has been supporting the Chinese position, say, on the South China Sea at ASEAN meetings. And when ASEAN tries to make consensus statements it's complicated that process quite a bit.

China is also the largest source of foreign direct investment, and the largest aid donor now to Cambodia. I've seen it reported that its aid to Cambodia, for instance, is now about four times that of the United States. So, you see a little bit of that that imbalance growing.

But I think when you look at China's growing role in Southeast Asia there is a lot of talk about how China might be affecting domestic political trends. Xi Jinping did talk at the 19th Party Congress about China being a new model of sorts for countries wanting to speed up their development. It was a short statement, but it certainly has gained a lot of attention. When I look at this though, you know, I tend to think that Chinese efforts may be reinforcing or encouraging kind of preexisting authoritarian trends like in Cambodia or perhaps inhibiting democratic consolidation in countries like Myanmar. But it's hard to see whether they're really proactively, say, promoting a Chinese model in particular. I think the evidence is still a bit anecdotal on that point. So, put another way, I think China seems more interested in expanding its influence, particularly in mainland Southeast Asia, than it is in sort of transforming the domestic political structures of individual countries.

TAUSSIG: So, would you say it to continue on this conversation about China's Belt

and Road initiative, I mean, it's certainly been described by its critics as having the potential to build political influence that would have potentially negative or more authoritarian-leaning governance effects in Southeast Asia. Would you say that in the years ahead that this is an accurate criticism or is it too early to tell whether Chinese economic statecraft will be accompanied by political influence?

STROMSETH: So, I think it's really a very fluid situation right now. We've definitely seen examples where I think a massive influx of Chinese investment and lending has tended to increase corruption or shield authoritarian leaders from political accountability in the region. It's also generated, you know, kind of a backlash and we're kind of watching that right now as some countries are re-examining their contracts with China. There's growing concern about debt traps and it is actually affecting domestic political developments. You know, in Malaysia's election last year Dr. Mahathir defeated Prime Minister Najib in part by openly campaigning against Chinese influence. And there's some concern about that now in the Indonesian electoral campaign as well. But it seems also that most countries seem interested in continuing to take Chinese money. And I don't think we should underestimate kind of China's capacity to learn as well and learn from their implementation mistakes with BRI and figure out how to put together contracts that maybe will have a little more durability and sustaining sustainability.

TAUSSIG: And development and infrastructure spending in the broader context seems to have become a tool of competition, one could say, between the United States China and others such as Japan in the region.

Jonathan what do you see is the United States doing in response in terms of its economic policies, its investment and infrastructure spending in the region, to perhaps dilute the power of Chinese economic statecraft in Southeast Asia?

STROMSETH: Well, I think, very clearly the Trump administration has launched what they call a Free and Open Indo-Pacific strategy in the region, sometimes called

FOIP, a bit of a tongue twister of an acronym. And it openly identifies China as a strategic competitor. It says that Beijing is seeking Indo-Pacific regional hegemony through things like predatory economics, for instance. But at root this strategy seems to be, and it has a lot of antecedents in Japanese policy as well—I think Mireya I could comment on that—but it is, you know, ultimately at root a maritime security strategy that offers a kind of counterbalance to China in that particular domain in the South China Sea, Indian Ocean, and so on.

Recently, if one looks at speeches related to the Indo-Pacific strategy, one does see a little bit more of an aspirational agenda in the values realm. So, you hear talk of good governance, transparency, protection from coercion, and so on. But I do think we need to set that against a general downgrading of the pro-democratic posture of the U.S. under the Trump administration. So, it's maybe some mixed signals being sent to the region.

Given that we've talked a lot about infrastructure and economic issues as you mentioned in this discussion, I think it's worth noting that after TPP came to an end, or the U.S. pulled out of TPP, this strategy had very little economic content for quite a while.

TAUSSIG: The free and open Indo-Pacific strategy?

STROMSETH: Yes, and they've been adding, the administration has been adding some things recently, for instance on digital connectivity energy security and access. And I think most promisingly on promoting sustainable infrastructure development. And very recently of I think it was at the end of the year last year, there was a memorandum of understanding that was signed between the U.S. Overseas Private Investment Corporation, or OPIC, and the development finance agencies of Japan and Australia to try to kind of catalyze Indo-Pacific infrastructure investment in ways that is transparent, promotes connectivity, and promotes sustainable economic growth. And I think that this is a real opportunity for catalyzing what we sometimes call likeminded co-operation to show that these countries can work together and promote a very sustainable approach to

infrastructure investment and development going forward. And I don't think we should lose this opportunity. Sometimes MOUs and platforms like this can kind of wither on the vine and they're hard to implement and get going. But I do think this is an opportunity and it might give countries like this working with Singapore, that has their own infrastructure initiative in the region, an opportunity to sort of show a certain model that can work in a very sustainable way and then perhaps reengage China on these issues, but from a position of strength.

TAUSSIG: And Mireya, as Jonathan just mentioned, the concept of a free and open Indo-Pacific strategy was originally conceived by Tokyo. So, given that what role do you see Japan playing in this nascent free and open Indo-Pacific strategy in addition to some of the economic roles that you mentioned earlier?

SOLÍS: Sure, Torrey. Prime Minister Abe has been talking about the free and open Indo-Pacific for at least a decade.

TAUSSIG: Seems that it's almost a success for Japan to see the Trump Administration pick up on this concept.

SOLÍS: I think they were very gratified by that. And I think it's important when you think about the concept that they're just not thinking about expanding their geographical horizon—and it's a very ambitious conception geographically because you're talking about, they're talking about the confluence of two oceans and the confluence of two continents. So, you know, we usually don't discuss this, but they also think about Africa in Japan when they are thinking of the free and open Indo-Pacific. So, it's a very ambitious vision in terms of how far it reaches. It's not just East Asia proper, it's not Asia-Pacific, but it's really in the Indo-Pacific a lot is included.

More importantly, perhaps, is a set of principles that they are thinking about in driving this strategy because I think that tells you very much what kind of community, what kind of region they would be interested in building. So, what are the principles that Japan

always alludes to when they're talking about the free and open Indo-Pacific? Openness, and this is in contrast to, say, a sphere of influence position. Then freedom. And for them, as Jonathan was saying, the maritime domain is very important. So, freedom of navigation, that's essential for a trading nation like Japan, it's essential for its security as well. And rules-based, the idea that coercion will not be the way in which you settle disputes among nations, but that you have to have these objective rules-based being respected.

Now this is the concept. What is Japan's role here? There are different ways in which Japan can contribute to the strategy. One is capacity building. And Japan has—again I would like to emphasize that Japan has been doing this for a very long time, you know it goes back decades through each economic assistance program. Japan has also been providing a lot of capacity building to countries in Southeast Asia and more recently, for example, enhancing the Coast Guards of countries that are, you know, preoccupied with the issue of the South China Sea and how they're going to be policing their territorial waters and so forth. Japan is doing a lot on that front.

But Japan is doing a lot on the connectivity agenda as Jonathan was saying. And here I think that, again, although Japan has been financing infrastructure for decades, the new geopolitical context brings a new meaning to this. And when I think about what are the essential objectives that Japan is trying to achieve through its connectivity agenda, I would posit two. One is to prevent a disengaged distance to the United States. And the other one is to prevent an all-dominant China in the region. None of them are good for Japan's security. None of them are good for the governance of the region. So, very interestingly Japan has fleshed out a multidimensional connectivity agenda that has many partners. So, Japan has its own initiative, partnership for quality infrastructure, but also has partnerships with Australia, with India, with the United States, the likeminded angle if you will. And the key priority there is the United States.

But importantly, because here is where the difference between the Japanese view

of the free and open Indo-Pacific differs from the American one, is not about excluding China altogether, because they have indeed launched recently a business-to-business cooperation initiative, and third countries that include infrastructure finance. It's not going to rise to the level of priority that the partnership with the United States has. But it's important because it sends a signal to the countries in Southeast Asia that Japan is not overtly trying to elbow away China because they understand that they cannot do that.

But the idea is how you then create an incentive for China to abide by the standards that Japan believes are important, but at the end of are going to improve the governance of the region. So, transparency, debt sustainability, fit with long-term development strategy. To the extent that you can get China to sign on to projects that abide by these standards, that's beneficial.

TAUSSIG: And, Mireya, you've mentioned that Japan has been proactively supplying high-quality infrastructure financing through this connectivity agenda for a long time now but it's taking on greater importance in this geopolitical environment. And Japan does have an interest in removing an overdependence on BRI projects for other countries in the region but also elsewhere. And I want to push a bit further to get a sense from you on what specific aspects of Japan's infrastructure and investment projects you see as having a positive governance effect on its quote unquote target countries. Because as infrastructure becomes a tool, a greater tool of competition between the U.S., China, and Japan, it strikes me that an important aspect is to make this a race to the top, as opposed to a race to the bottom on infrastructure and investment. And so, do you see any particular areas of Japan's efforts that could have an effect on positive governance standards?

SOLIS: Yes, I mean to the extent that these are projects that are governed by all these principles that I enumerated, that are not going to create financing debts that cannot be repaid by governments, that are not going to go just with China because nobody else is putting money on the table, you could argue that these could indeed improve governance

standards. But also, my observation from watching how Japan puts together these packages is that they have a comprehensive map. And sometimes when they look at economic assistance toward some countries in Southeast Asia, they're also looking at how that country fits within the larger sub-region and trying to maximize connectivity and efficiency and interdependence among neighbors. So that also is an important aspect of how Japan configures its economic assistance.

And the more you can avoid this zero-sum mentality, I think that the more countries in the region feel comfortable that they can, you know, talk to different countries without being seen as, you know, trying to play into the geopolitical situation.

And the last point is that many countries feel uncertain about this message that, you know, you have to choose, and you shouldn't choose China's financing because it's problematic, is that the United States does not appear very reliable. And this constant backtracking of that we have with the Trump administration, messaging on China not just on the trade talks for example, also creates concerns among countries in the region and ties back to my point about people would like to see a steady hand and a clear sense of direction. And in many ways Japan is the one providing that.

STROMSETH: I think what's interesting in this, in this current debate is that there is a possibility for more trilateral or different forms of cooperation among likeminded partners to promote the sort of more transparent, sustainable infrastructure that we talked about. But some of the partners that the U.S. could work with clearly have a bit of a more open mind about China, whereas the U.S. does not. And so, I think if some of these new platforms and mechanisms that we've talked about today do end up getting some traction it will be interesting to see how they play out a few years down the line and whether there's an open door to China or not. Because some of the other partners I think would want to see it moving in that direction.

TAUSSIG: And, Jonathan, final question to you on this. Do you see this competition

of infrastructure providers enhancing good governance in the region as affecting in a positive way democratic trajectory in the year ahead or do you see more of the zero-sum game beginning to emerge through these tools of infrastructure and investments?

STROMSETH: In connection with that, Torrey, I'd also like to touch on a point that Mireya made about the differences between perhaps the U.S. vision of the Indo-Pacific as currently stated and Japan's vision, in the sense that Japan and other visions in the region—including Indonesia's which is starting to develop a kind of Southeast Asia view of the Indo-Pacific—doesn't mean to exclude China. And when I travel to the region, whether I'm in Singapore, or Indonesia, or elsewhere, a common theme you do hear is, "don't make us choose." And when you look at economic projections that go 10, 20 years into the future they know that China is going to loom all the larger. And so, it's kind of unrealistic for them to sort of being told there's a choice here. There's a clear choice, for instance, which is language we hear in Washington sometimes.

So, I think there is opportunity for promoting a form of infrastructure investment that is promoting greater transparency, fewer debt traps, and along the way greater sustainability. And with that I think good governance will come as well, because if you promote it in the economic realm and it's intermingled with the political realm, I think that will reinforce good governance and democratic trends.

TAUSSIG: And with that I think that we can say that this region in the years ahead is going to be a critical arena for the struggle for democracy in geopolitics and one in which we can hope that greater competition between the U.S. and China and other actors in the region such as Japan only increases or enhances good governance trajectory. But we will of course see.

TAUSSIG: Thank you for this very interesting discussion, Mireya and Jonathan, and I appreciate you taking the time with us in the studio today.

SOLÍS: It's a pleasure. Thank you.

STROMSETH: Thank you.

(MUSIC)

TAUSSIG: You can find out more about the Democracy and Disorder Project at brookings.edu/democracyanddisorder.

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