

# SPECIAL REPORT

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## Huawei's Expansion in Latin America and the Caribbean: Views from the Region

By *Parsifal D'Sola Alvarado*



Drivers for a ride-hailing service monitor their cell phones for customers near a shopping mall in Caracas, Venezuela, on May 5, 2022. (Photo by Matias Delacroix/AP)

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### Summary

- Huawei actively leverages China's foreign policy and diplomatic ties in Latin America and the Caribbean to win clients and gain market share.
- Clients in Latin America, particularly service providers, tend to hold a positive view of the company. Local employees, however, seem to prefer working for Huawei's competitors because of their higher labor standards.
- Huawei's unmatched customer service is a key factor that sets it apart from its competitors. However, the hiring practices and operational processes that make this customer service possible come at the expense of an exploited workforce.
- Research revealed no evidence or even suspicion of wrongdoing by Huawei in relation to hardware security breaches such as data leaks, back doors, or sabotage.
- There is, however, clear evidence that Huawei has relied on unfair and illegal market practices to gain market share, including price dumping and bribery.
- Countries in Latin America and the Caribbean welcome China-based companies and Chinese technology. As a consequence, the US push for the securitization of Chinese technology has largely failed to gain traction in the region.

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## ABOUT THE REPORT

This report examines Huawei’s standing in Latin America and the Caribbean and how it managed to become a key provider of information and communications technology in the region. The report is based on a series of interviews with Latin American professionals who have extensive experience working for Huawei. The report was commissioned by the China program at the United States Institute of Peace.

## ABOUT THE AUTHOR

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Huawei ads are seen on a street corner in the Coyoacán section of Mexico City on January 28, 2022. The company estimates that over 80 percent of phone calls in Mexico go through a Huawei device. (Photo by Bruno\_Doinel/Shutterstock)

## Introduction

The controversy surrounding Huawei Technologies Co. Ltd. in the United States and other Western countries has not been echoed in Latin America and the Caribbean.<sup>1</sup> Whereas the US government has been concerned over the company's ties to the Chinese Communist Party and China's military for over a decade amid allegations that its wireless networks might be used for covert surveillance by the Chinese government, such concerns do not resonate in Latin America and the Caribbean, where the Chinese corporation continues to be welcomed. The US government banned the use of Huawei equipment by federal agencies and contractors in 2018, and in November 2022, the Federal Trade Commission voted to ban sales and imports of Huawei equipment; to date, not one Latin American or Caribbean country has banned or implemented any sort of restrictions on Huawei or any other Chinese telecommunications company. To the contrary, Huawei is expanding its presence as one of the main information and communications technology (ICT) enterprises in the region.

Viewed from an international security perspective, telecommunications infrastructure has often been viewed as a zero-sum competition over who has access to and control over data. On the other hand, when viewed through the prism of local socioeconomic interests, especially in less developed countries, telecommunications infrastructure can be a vital force for stability

and growth.<sup>2</sup> The development of telecommunications infrastructure by Chinese companies in Latin America should be examined from both of these perspectives to help a US audience to understand the forces at play more deeply.

In 2022, Huawei's year-on-year revenue was essentially flat after falling 28.6 percent in 2021—a remarkable performance given US sanctions on the company, including export controls on advanced chips and chip-making equipment to China.<sup>3</sup> One of the reasons Huawei sales stabilized and did not plunge further was that the company had a strong presence in the Global South, especially Latin America and the Caribbean. For example, Huawei estimates that over 50 percent of 3G and 4G mobile networks in Brazil run on its equipment.<sup>4</sup> In Mexico, according to Huawei's Latin America marketing and strategy director, Joaquín Saldaña, more than 80 percent of phone calls go through a Huawei device. In the smartphone sector, for 2022's second quarter, the company's market share in Chile, Colombia, Mexico, and Peru still averaged around 14 percent after falling from its peak of 24 percent in 2019, prior to US sanctions.<sup>5</sup> In cloud services, Huawei has nine data centers in the region: two each in Brazil, Chile, Mexico, and Peru and one in Argentina.<sup>6</sup> Moreover, Huawei is leading the way globally in the 5G industry, which has tremendous growth potential.<sup>7</sup>

How did Huawei achieve this level of success in the region? Why is there such a stark contrast between Huawei's standing in the United States and in its neighbors to the south? And what are the security implications for the United States and Latin American and Caribbean countries of Huawei's continued expansion in the region? This report is intended to answer these questions from a Latin American perspective, specifically that of Huawei employees and industry insiders.

To better understand their vantage point, the author interviewed seven telecommunications professionals who work or have worked for Huawei in Latin America.<sup>8</sup> They included staff, contractors, and consultants, all Latin American nationals, who have managed projects and provided services for Huawei in Argentina, Belize, Bolivia, Chile, Colombia, Ecuador, Guatemala, Mexico, Peru, and Venezuela, as well as in Spain; three also worked for service providers that were clients of Huawei.<sup>9</sup> They worked in areas such as field engineering, sales, customer service, and project management. Alejandro Blanco, an adviser to the author of this report, worked as a radio frequency engineer for Huawei in Bolivia, Colombia, and Mexico for six years and for Telefónica Venezuela, a client of Huawei, for three years. The interviews were framed around the topic of security, with a focus on data privacy and fair market practices. Except for Blanco, all interviewees chose to remain anonymous either because they still work for Huawei or because they wanted to avoid the risk of negative repercussions within their lines of work. Their firsthand testimonials offer insights into Huawei's operational practices in Latin America and how the company managed to become a key provider of ICT hardware and services in the region.

As the interviewees made clear, and as this report argues, myriad factors have played a role in Huawei's rise, government support and access to cheap capital being key among them. But Huawei's competitive edge entails more than simply low prices and government backing.<sup>10</sup> Ultimately, varying degrees of institutionalization in the countries where Huawei operates and lack of interest in securitizing Chinese technology have played as much of a role as Huawei's internal operational practices.

The report begins with an analysis of Huawei’s complex ties with China’s government and how this relationship, aligned with China’s foreign policy objectives, has been instrumental in its global outreach, particularly in Latin America. The next section examines the distinct aspects of Huawei’s business model—including its workforce composition, customer service approach, and operational dynamics—that set it apart from its competitors. The third section delves into the company’s market strategies, highlighting its preference for market dominance over financial profitability, and sheds light on illicit tactics that have disadvantaged its competitors. The report concludes by presenting a series of strategic recommendations for the United States aimed at offering Latin American nations a viable and appealing alternative to Chinese ICT firms. These recommendations are designed to align with the region’s specific needs and priorities while simultaneously addressing the long-term strategic interests of the United States.

## A Latecomer Riding the Wave of China’s Foreign Policy

Western companies such as Ericsson, Nokia, and Siemens were able to establish themselves as global ICT brands after decades of gradual market expansion. Huawei, in contrast, was a latecomer that for years had little brand recognition outside of the People’s Republic of China (PRC), but managed to catch up with its competitors and then achieved global industry leadership in the first two decades of the 21st century.<sup>11</sup> “At one point, we had four vendors. There was Nokia, there was Ericsson, there was [China-based] ZTE, and there was Huawei—but there was nothing like Huawei,” recalled one interviewee, a senior radio frequency engineer/technical manager who worked in the first half of the 2010s for a Huawei client. “The service they offered, their level of customer service. . . . Huawei was incredible.”<sup>12</sup> Such positive attitudes are commonplace among Huawei clients in the region.

For Huawei, one of the stepping-stones to success in Latin America—and the Global South as a whole—has been the company’s complex and sophisticated relationship with the Chinese government. Obtaining government backing both domestically and internationally was never a given; the company had to earn it, and doing so can be largely attributed to its founder and CEO, Ren Zhengfei.

Ever since he founded Huawei in 1987, Ren has proved agile at navigating Chinese politics to promote his company at home and abroad. According to a *Wall Street Journal* report from 2019, Huawei has received an estimated \$74.6 billion in the form of credit facilities, tax breaks, and other financial assistance from the Chinese government.<sup>13</sup> Although he is not a politician, given his prominent role as the head of one of China’s most important ICT enterprises, Ren is an important figure in China’s political establishment. His ties to the Chinese Communist Party extend back to the late 1970s and early 1980s, when he held the rank of deputy regimental chief in the People’s Liberation Army, a position assigned to well-connected, loyal members of the party.<sup>14</sup> Ren has skillfully aligned his company’s international expansion with China’s foreign policy goals in a strategy that dates back to the fall of the Soviet Union.<sup>15</sup> “The strategic relationship between



A contestant checks her phone as she waits to compete in the Miss Cholita Paceña pageant for Indigenous women in Valle de la Luna, on the outskirts of La Paz, Bolivia, on June 23, 2023. (Photo by Juan Karita/AP)

China and Russia will be in line with the two countries' fundamental interests and national security," Ren remarked in 1997. "Huawei's transnational marketing should follow the path of China's foreign policy." He also stressed that Huawei's entry into Russia in the 1990s was not only driven by profit but was also in agreement with China's geopolitical goal of undermining US hegemony.<sup>16</sup> Huawei's nationalistic drive and purposeful alignment with China's interests abroad won the state's support, eventually turning Huawei into one of China's "national champions."<sup>17</sup> In turn, as part of its drive to internationalize Chinese ICT firms, China's government has helped ease the company's entry into emerging markets, Latin America and the Caribbean included.

Take the case of Bolivia. For the past two decades, China's government has been laying the groundwork in Bolivia for Huawei and a string of Chinese companies to expand in the country. In 2009, just one year after Entel, Bolivia's largest telecom provider, was nationalized, Huawei was awarded a \$120 million contract to build telecommunications infrastructure in rural areas.<sup>18</sup> The project was the latest in a series of government-to-government contracts between Bolivia and China, including a \$300 million satellite, financed by the China Development Bank, and the purchase of six K-8 fighter jets. Just two years later, in 2011, an official visit to China by Bolivian president Evo Morales included meetings with high-ranking representatives from Huawei and state-owned ZTE Corporation.<sup>19</sup>

In 2019, Expocruz, Bolivia's most important international business fair, provided a clear example of how far Huawei has come in the country. The exposition is held every year in the city of Santa Cruz, the country's financial capital. During the event, Entel, together with Huawei, held Bolivia's first 5G trials; and Oscar Coca, Bolivia's minister of public works, officially launched the 5G pilot using a Huawei Mate 20 X phone.<sup>20</sup> "It was a mixture of state propaganda promoting Entel as the only operator in the country carrying out tests on the 5G network. . . . It served Huawei to strengthen its commercial relations, as the trial was completely sponsored by the company," said Blanco, who at the time worked as a radio frequency engineer for Huawei and helped set up the test run. While Bolivia is still years away from deploying a nationwide 5G network, Huawei is already in line to become the country's main 5G equipment vendor. Aside from Entel, Huawei also supplies telecommunications equipment to Tigo and Viva, Bolivia's main private phone and internet service providers.

The closest relationship between Huawei and a Latin American state is probably to be found in Venezuela, where Huawei and ZTE have become the dominant providers for telecom operators, both public and private. In the early 2000s, Huawei's operations in Venezuela skyrocketed as a direct consequence of the tight government-to-government relations with China that developed during Hugo Chávez's 13-year tenure.<sup>21</sup> Huawei's first large contract came in 2004, when the company signed a \$250 million contract with Conatel, the government's telecommunication agency, to improve the country's fiber optic infrastructure. By 2006, Huawei was already the leading supplier in Venezuela of CDMA equipment.<sup>22</sup> Huawei's local presence grew to such an extent that, by 2012, it had more than 1,300 local employees, with three offices in Caracas and four technical support centers across the country. At the time, Huawei's office in Caracas acted as the company's regional headquarters in all but name. Between 2007 and 2015, Huawei was involved in joint ventures, government contracts, training programs, and local manufacturing, all stemming from agreements related to the Sino-Venezuelan Joint Funds, China's largest loan portfolio to any single country.<sup>23</sup> Venezuela eventually lost relevance for Huawei due to the country's economic implosion.<sup>24</sup> By 2017, most of Huawei's personnel, local and Chinese, had transferred to other offices in the region or left the company.

In part because of Caracas's close ties to Beijing, in 2016, Belize's state-owned telecom service provider, Belize Telemedia Limited (BTL), which operates through the Digi brand, established a partnership with Huawei to roll out a nationwide 4G LTE network.<sup>25</sup> Digi became the only 4G provider in the country, with speeds and quality ultimately superior to those of other Caribbean and Central American countries.<sup>26</sup> "I was alone in the project rollout [when] they completely swapped from Ericsson to Huawei," recalled one interviewee, who worked for Huawei as a senior radio frequency engineer and technical manager. "Why did they do that? In my view, it was because of the socialist government. . . . Belize was strongly allied with the Venezuelan government, so much so that there was an office of Petrocaribe [the Chávez-era program under which Venezuela provided oil to Caribbean nations at discounted prices] involved in some manner." The 4G LTE project was part of a \$100 million capital investment plan by BTL in partnership with Huawei to modernize Belize's mobile and fixed broadband infrastructure.<sup>27</sup>

China's government plays a role similar to that of an international lobbying firm that seeks to promote Chinese industries through government-to-government relations, especially those industries considered strategically important for China.

The state of São Paulo in Brazil is another example of Huawei working through a local government to establish itself. In 2021, Huawei opened Latin America's first 5G "innovation center" in São Paulo, a \$6.7 million center dedicated to the development of 5G solutions, applications, and technology research.<sup>28</sup> São Paulo is also home to the Huawei Local EMS (electronic manufacturing services) factory, a manufacturing center that utilizes an arrangement of 5G,

Internet of Things, and cloud services in its production line, and to the Sinovac vaccine production plant, a factory with an annual production capacity of 100 million vaccines, not only for COVID-19 but also for rabies, the Zika virus, and hepatitis A.<sup>29</sup> This is no coincidence. For many years, São Paulo governor João Doria was an ardent proponent of developing closer ties with China, a predilection that did not go unnoticed by the PRC and associated companies.<sup>30</sup> Over the years, he met with a series of high-ranking PRC officials and Chinese companies to promote São Paulo as an investment destination.<sup>31</sup> In 2019, together with Huawei's local director, Doria announced that Huawei was investing \$800 million in the construction of a manufacturing plant for 5G equipment to address future demand in Brazil and the region.<sup>32</sup>

Outside of the region, the case of Spain is also worth highlighting. Spain, aside from having deep political and economic ties to Latin America, is home to Telefónica S.A., one of the region's most important phone and internet service providers. Because of this, decisions concerning Huawei that are made in Spain have the potential to affect the company's operations in Latin America. There also is evidence of coordination between Huawei and the Spanish government.

In 2019, EU member states and the European Commission published a report assessing cybersecurity risks in 5G networks. The report stressed that state actors represent the most significant threat to national security and that several EU members had identified "certain non-EU countries" as particular risks to their national interests.<sup>33</sup> This was followed in 2020 by the launch of the "EU Toolbox for 5G Security," a series of measures aimed at reducing digital threats to 5G networks.<sup>34</sup> In both instances, although China and Huawei are not explicitly mentioned, references to "model of governance" and the absence of security cooperation agreements clearly point to nondemocratic and non-Western countries such as China.

In Spain, however, little attention has been paid to the recommendations. "When the security issue exploded in 2019, I know of many private clients that closed the doors on Huawei," stated an interviewee who at the time worked for Huawei as a sales representative to the Spanish government. "Nonetheless, they [Huawei] still won many public tenders." On the negative side of the company's ledger, Huawei's smartphone sales in Spain nearly collapsed.<sup>35</sup> Huawei's cloud and data center services also suffered, primarily because VMware, a US company with a large presence in the Spanish market, banned Huawei equipment in accordance with US regulations. Consequently, VMware's large customer base, primarily in the private sector, no longer uses Huawei products.

In contrast, Huawei Carrier, the business unit that works with telecom operators, has remained solid. "The rest of [Huawei's] projects were not affected," an interviewee who worked as a pre-sales engineer noted. "Sometime after I left Huawei, they contacted me [in 2020] because they



were interested in me going back, and they said, verbatim, words of Huawei’s director of the Enterprise division, ‘The economic and commercial blockade is not affecting Spain because the government is in line [with us].’” To date, despite pressure from the European Commission, the Spanish government has yet to publish its position concerning the implementation of the measures in the EU Toolbox for 5G Security.<sup>36</sup>

These are but a few examples of how Huawei leverages Chinese foreign policy in Latin America and elsewhere. Between 2011 and 2019, the heads of state of Argentina, Bolivia, Chile, Ecuador, and Venezuela all met with high-ranking representatives from Huawei, including Ren. Members of China’s diplomatic corps were present in all instances. Essentially, the PRC government plays a role similar to that of an international lobbying firm that seeks to promote Chinese industries through government-to-government relations, especially those industries, such as ICT, considered strategically important for China.

## Unrivaled Customer Service, Unhappy Employees

Huawei’s ability to profit from China’s diplomatic muscle is only one of the reasons for the company’s success in Latin America and the Caribbean. Another key factor that sets Huawei apart from its competitors is its customer-centric work doctrine. Just like its competitors, Huawei has three types of employees: staff, contractors, and consultants. While all three are challenging positions, the staff position is by far the most demanding. “The workload was strenuous,” remembered the interviewee who worked as a solution sales manager. “I am not exaggerating—it was 24/7. . . . It was from Monday to Sunday. . . . You arrived early in the morning and sometimes did not leave until 11 to 12 at night.”

Staff positions for locals are limited by design, and Huawei’s supervisors—all Chinese nationals—make sure that local hires know the importance of their positions. The same interviewee recalled: “When I was offered a job as part of the staff, my boss told me, ‘Being staff is a lot of responsibility; if you feel pressured now [as a contractor], I am going to pressure you even more, because I am giving you something that we do not offer to everyone.’” Huawei’s demanding work culture in its headquarters in Shenzhen is well documented, a culture that extends to its offices across Latin America and the Caribbean.<sup>37</sup> “I worked in two offices [Argentina and Venezuela], but I also spent time in an office in Brazil, in an office in Peru. I’ve moved through several offices in Latin America, I was also in China, and Huawei works the same everywhere,” said the sales manager. “The work dynamic within the offices is very similar.” While work hours and remuneration vary by country, vacations are a rarity, but salaries tend to be competitive.

Contractors, as in many other industries, get the worst deal of all. Most people who work as contractors for Huawei tend to be recent graduates who wish to gain experience. They are in high-rotation, low-paying jobs: “Most contractors do not stand the workload, especially given their low salaries, so they just quit after a few months,” noted Blanco. Their work is mostly focused on routine operations and supporting other staff.

Consultants, in contrast, are the best compensated, although their work hours tend to be as long as the staff's. They tend to be telecommunications engineers with years of experience. "When I started as a consultant [in 2016]," Blanco said, "salaries were around \$6K to \$7K per month, but years before, I have friends who earned up to \$10 to \$12K or even more. . . . My friends who worked as consultants for Ericsson and Nokia earned more or less the same." While median incomes vary widely across the region, these are exceptionally high salaries even for the Latin American countries with the highest income levels, such as Chile, Panama, and Uruguay.<sup>38</sup>

The hardest-working employees are the people from China who are temporarily working abroad. Many tasks concerning pricing, troubleshooting operations, and network enhancement configurations are handled by Huawei's headquarters in Shenzhen. Given the language barrier, the local Chinese staff are the points of contact with China. They tend to work around the clock due to the time difference.

The triangulation between Latin American employees, Chinese nationals working in the region, and Huawei's headquarters in China is a differentiating factor that significantly accelerates troubleshooting and network optimization processes. "Troubleshooting is something that must be highlighted—it's great, it's very fast. If hardware malfunctions, they quickly replace it," said another senior radio frequency engineer, who had worked as both a consultant and as Huawei staff. "Something that might take a month [with other vendors], they would solve within a week." Internally, Huawei facilitates escalating network issues to R&D in Shenzhen, something that illustrates a high degree of coordination between regional offices in Latin America and those in China.

In this respect, there are two key differences that set Huawei apart from other vendors. First, Huawei relies heavily on transferring network information outside the region for troubleshooting and network enhancement purposes. The same engineer noted, "In Ericsson, troubleshooting is done at a local level—the information does not necessarily have to reach Sweden. All the expertise is local. They can be consultants from other countries, but everything stays here. I never heard in Ericsson that information had to be transferred to a GCC [global capability center] at an international level. In Huawei, it goes through different hands until it reaches China."

It must be highlighted that Huawei does this in accordance and in compliance with its clients' security protocols. Internally, Huawei has a hierarchical management platform that works across offices and serves to optimize communication, evaluate network malfunctions, and fast-track the approval of network changes. This is a highly encrypted platform to which only Huawei employees have access. It is also important to emphasize that no private user data are shared in these communications. In fact, no telecommunications vendor has access to user-specific data. From a technical perspective, due to mobile network encryption protocols, such access is simply not possible. User data is kept and safeguarded by service providers such as AT&T and Telefónica.

The types of information Huawei shares across its offices include equipment configuration, network composition (e.g., the number of nodes, port IP address, type of network, and hardware), and key network performance indicators. The proprietors of the shared information are the service providers, and it is in their interest that the material not be shared with outsiders, especially not their competitors, because it contains details of the overall composition and performance of a service provider's network.



Cellular, TV, and radio antennas are arrayed along a mountaintop near Quito, Ecuador, with the slopes of the Cotopaxi volcano visible in the background. (Photo by Michael Müller/iStock)

Sharing information about a network's configuration does pose considerable risks, even if the data shared are encrypted. The radio frequency engineer explained:

For me, hardware configuration files are the most important and critical [of what is shared internationally]. They contain the parameters at every network level, nodes, network cells, IP, every layer of the LTE technology is included in those scripts. . . . Anyone with bad intentions can manipulate a network with just a port and an IP address. This is precisely the type of information that is shared with China for troubleshooting purposes.

Every vendor has access to these configuration files, so the potential for doing harm is inherent to the industry. On the one hand, Huawei's management platform and information sharing increase security risks, but, on the other hand, they also expedite solutions. In a fiercely competitive industry where seconds of network downtime can cost millions of dollars, solving problems quickly is vital. According to Huawei clients and all the interviewees, Huawei is unrivaled in this respect. For countries that do not prioritize network security, a group that includes most Latin American nations, the benefits far outweigh the risks. The same can be said for most countries in the Global South.

The interviews did not bring to light any evidence or suspicion of wrongdoing by Huawei in relation to hardware security breaches such as data leaks, “back doors,” or sabotage. Between them, the interviewees collectively spent 46 years working for Huawei in 11 different countries. Furthermore, of the seven interviewees, five described their overall experience working for Huawei as negative or very negative, so it seems unlikely that they would try to cover up any wrongdoing, whether inadvertent or deliberate, by the company. The fact that there is no indication of hardware security breaches of Huawei’s equipment and services in the region is worth noting.

The second differentiator that sets Huawei apart is its dynamic staffing model. While moving personnel—especially consultants—across projects is commonplace in the telecommunications industry, Huawei has made it a core feature of its *modus operandi*. Huawei consultants are constantly on the move, shifting from project to project and from country to country. It is also customary for the company to fly engineers in from China for important large-scale projects.

Consultants are hired not directly by Huawei but through a third party. This is also a common practice in the industry; it allows vendors to move personnel around without having to worry about work visas, taxes, and paying benefits. Those responsibilities are transferred to the consultants themselves, who are well compensated for the effort. A decade ago, Huawei worked with various human resources (HR) recruitment companies in Latin America and the Caribbean, but today the company operates almost exclusively with Tangent International, a global HR consultancy firm headquartered in the United Kingdom that focuses on communications and technology. “All consultants who want to work for Huawei have to be represented by Tangent,” commented the same radio frequency engineer. “Huawei and Tangent have a special partnership, where they obviously offer each other discounted prices.” Working through HR firms also helps Huawei make payments to consultants. For example, when US restrictions on Huawei began to be imposed in 2019, consultants in Latin America who had been paid in US dollars received a notice that they would henceforth be paid in euros, an adjustment facilitated by global HR firms such as Tangent that have accounts in different currencies. In fact, Huawei consultants are generally paid by companies based in Hong Kong, and those companies can change from month to month.

Overall, Huawei counts on a workforce that is available to its clients around the clock, a service for which the company has acquired an excellent reputation. The senior radio frequency engineer/technical manager described the experience:

As a client of Huawei, working in the tech sector, I received emails at three in the morning and had a person right by my side when I arrived the next day at the office. They had very good customer service. They always said yes—whatever you asked for, they said yes—and if it sounded too complicated, they would say, “We will try.” I later understood this when I worked for Huawei [as a consultant]. . . . They wanted to give everything they could to the client.

Less positively, the interviews revealed that the hiring practices and operational processes that make Huawei’s unmatched customer service possible come at the expense of an exploited workforce and limited possibilities for professional advancement for local employees, especially when compared with conditions at Huawei’s competitors. The senior radio frequency engineer who had held both staff and consulting roles explained:

The way the Swedes [Ericsson] and the Koreans [Samsung] work compared to the Chinese [Huawei] is completely different. . . . Samsung takes great care of their staff. They train them. I've never seen any dishonest work practice. . . . The contractors, personnel selection, labor practices and administration, work design . . . above all, they are respectful with their employees. They give you feedback on how your work is going, if it's going well or not, if there [should be] adjustments.

Furthermore, it seems that there is a level above which local personnel are never promoted within Huawei. Every interviewee stated that all decision-making positions were held by Chinese nationals. Said the solution sales manager, "In all my years working for Huawei [in different countries], I never had a team leader who wasn't Chinese."

## A Strategy Based on Local Realities and Weak Institutions

Huawei has adapted well to the dynamics of the telecommunications industry as well as to economic and political realities across Latin America and the Caribbean. Indeed, Huawei's inroads here cannot be completely understood without considering some distinct traits of the telecommunications market and the institutional framework of countries in the region.

When it comes to phone and internet service providers, there are a limited number of companies, especially in small and medium-sized countries. The same holds true for equipment vendors: there are only a few globally established brands in the market. Moreover, the products offered by vendors can be grouped into just two intertwined categories: hardware and support services. The moment a service provider acquires equipment, it is instantly tied to the vendor's brand for service and support. Having few alternatives makes for a playing field that benefits big players with financial muscle, such as Huawei.

In the mobile carrier business, part of Huawei's strategy has been to focus on access networks, which are the infrastructure that users connect to. They also enable a network to expand its geographical reach. Many Latin American countries have regions that are hard to access, such as remote islands, dense rainforests, mountainous regions, and isolated rural areas, where developing telecommunications infrastructure tends to be very costly. Consequently, if a service provider is approached by Huawei with an offer to build access networks in these areas at low cost or free of charge, the provider will usually jump at the opportunity. There are multiple cases across the region where Huawei has used this tactic. Such an offer is even more tempting for state-owned service providers than for private companies, because the government in power can take credit for improving mobile phone coverage for remote populations. This strategy has allowed Huawei to set itself apart from its competitors as the company that builds infrastructure in hard-to-access areas and to strengthen ties with local authorities in the process.

The strategy seems to have paid off. At present, Huawei works with every large mobile and internet service provider in Latin America and the Caribbean. Moreover, when a company works with all the service providers in one country, that company can effectively create a map of the



A woman checks her phone in the Plaza de Armas in the center of Urcos, Peru, on February 4, 2023. (Photo by Rodrigo Abd/AP)

mobile and internet coverage. This is true for Huawei and every other vendor that works at a national scale. As mentioned in the previous section, how a network is structured, including where it has coverage, is information that belongs to the service providers. Vendors are prohibited under contract from sharing this information. Nonetheless, there is evidence of Huawei taking advantage of this knowledge to expand its market share—a rough equivalent of insider trading in the telecommunications sector.

In Peru, for example, Huawei is one of the main equipment providers for the three largest operators in the country: Claro, Entel, and Telefónica. “At one point,” recalled the senior radio frequency engineer with both staff and consulting experience, “a Colombian company that had connections with the [Peruvian] state came up with the idea to install antennas in a public area where you needed permission from the municipality. They approached Huawei to learn where the three operators did not have coverage.” By knowing which sectors lacked coverage, the company was able to prepare a tailor-made proposal for the authorities. “‘Are you crazy? This is completely illegal,’ I told my supervisor. ‘You are selling private information. Do not make me a part of this.’ . . . It was one of the worst things I saw,” the engineer said. Moreover, this was not an isolated case of a corrupt supervisor. This interviewee continued:

In the meeting, there was a Chinese person. . . . I have no clue who he was. . . . In the explanation they gave me, it was clear this was not the first country where they had done this. It had already happened in Colombia, and they were advancing in Panama. They were quite relaxed about all of it, implying they did this everywhere.

Huawei's marketing strategy includes a mixture of highly competitive prices, sponsoring equipment, and, in some cases, bribery. "In Peru, as in other markets, according to my own experience and what I've heard within the company, Huawei enters markets through prices," said this engineer. He noted, "Ericsson and other vendors cannot compete with Huawei when it comes to costs, to the point that Huawei gives away a lot of infrastructure to gain clients." Most Latin American and Caribbean countries do not have strong antidumping regulations, a fact that large corporations can use to their own advantage. This interviewee said, "I've witnessed [working for Claro in Ecuador] how they changed a complete network core that had been Ericsson for years, and Huawei offered it at extremely low costs. Now [in 2023], they are changing everything. They are dropping Ericsson entirely."

Although building infrastructure does bring in revenues for equipment manufacturers, most income derives from network maintenance and support services. "Huawei's business model involves no profits from hardware sales; instead, they win through licenses, given that all equipment requires specific licenses to operate at full capacity," this engineer explained. "Licenses expire and need to be renewed. . . . If they dominate the market and install infrastructure at large scales, licenses are what really matter." Obtaining revenue from licenses is not specific to Huawei; all vendors profit from it. Where Huawei stands out is in its ability to disregard, to a certain extent, earnings from the sale of equipment and to focus on acquiring a larger market share. "The objective is to capture market share, not revenue," noted another interviewee, a presales engineer. "I remember when we were closing the year, revenue, while not completely discarded, was not used as a measurement of success. What mattered was how much market share had been gained."

These kinds of unfair market practices negatively affect Huawei's competitors as well as small companies trying to penetrate the market. The senior radio frequency engineer/technical manager recalled a bidding process conducted when he was working for another, smaller company: "We participated in a public tender [in Mexico] for an AT&T project of 6,000 antennas, if I remember correctly. . . . The project was about to be assigned to around 20 small companies, us included, but out of nowhere came Huawei and gave them all away, and we were all left hanging."

Spain, a country with stronger antidumping regulations than most Latin American nations, is not immune to these practices. The former Huawei presales manager described the situation:

In Spain, there's a legal procedure called "reckless discharge" [*baja temeraria*], which is when a company offers prices twenty percent below a public tender's estimated costs and the authorities hold a meeting with the company to understand the substantial price difference. [During my time in the company,] Huawei was called in countless times and they always got off by arguing some kind of discount. . . . Out of twenty procedures, [the authorities] must have kicked Huawei out in one or two; [the company] managed to justify the rest.

The different views of Huawei stem from the fact that the United States prioritizes geopolitics and security risks in its dealings with China, whereas Latin American countries prioritize the economic and technological benefits.

Service providers, both private and state-owned, obviously benefit from low prices and free equipment, and because there is only a very limited pool of market participants, there is little incentive to push against dumping.

The interviews made clear that the potential for irregularities in Huawei's conduct is directly correlated with the strength of the host country's institutions and rule of law. Of the 11 countries where the interviewees worked, Venezuela and Bolivia stood out as the worst cases. For instance, the senior radio frequency engineer/technical manager said he found this scenario when he arrived in Bolivia: "In the sales group, the first manager who was there, everyone knew that Huawei paid for his son's university abroad, and that they also bought him a house in Bolivia, and he was just one planning manager of many." In contrast, Huawei took Argentina's anti-bribery regulations very seriously, to the point that employees were constantly bombarded with emails about company policy and the severe consequences for offering bribes or committing security breaches.

## Lessons for the United States

Huawei's rapid expansion in Latin America and the Caribbean holds important lessons for the United States. As concerning as some of Huawei's practices may be, the company has nonetheless helped build considerable communications infrastructure that has benefited the region. It seems likely that future support in developing infrastructure will similarly see Latin American countries embracing Huawei rather than, as the United States would prefer, rejecting the Chinese brand. This difference in perspectives between many Western countries and those in Latin America and the Caribbean should not be attributed to level of development or democratic governance. Chile, Costa Rica, and Uruguay, all countries where Huawei has a large presence and has not generated any controversies, are middle- to high-income nations with standards of democratic governance that rank higher than those of the United States and many EU countries.<sup>39</sup> To a large extent, the different views of Huawei stem from the fact that the United States prioritizes geopolitics and security risks in its dealings with China, whereas Latin American countries prioritize the economic and technological benefits that Huawei and other Chinese ICT companies offer. Additionally, as many studies show, technological complexity and the need for continual software updates mean there is no feasible methodology to ensure, in a timely manner, that telecommunications hardware and software are totally secure, regardless of who developed the technology and made the equipment.<sup>40</sup> The United States and Latin America will remain in different camps because, ultimately, the decision to trust in a foreign technology manufacturer is a decision made on political, not technical, grounds.

Given current trends, Huawei is bound to play an important role in the ICT ecosystem of Latin America and the Caribbean, especially in delivering the myriad services that will spring from the development of 5G networks and related technologies. While the United States has an array of economic, political, and technological tools with which to pressure countries not to work with



Huawei—or any other company based in China—these measures will only slow down Huawei’s expansion in Latin America and the Caribbean, not push it out of the region. Were the United States to take a path of coercing Latin American nations to limit the participation of PRC-based firms, not only would there be strong pushback from the region, but US-Latin America diplomatic ties would also be damaged, which might well result in these countries forming closer ties to Chinese companies.

It is important for US policymakers to understand that, regardless of the validity of security concerns regarding Chinese technology and manufacturers, Latin American and Caribbean countries by and large either do not share those concerns or do not consider them a priority. If they did, the securitization discourse surrounding Chinese technology would have gained some traction across the region, especially given US efforts to include the topic in bilateral conversations. Broadly speaking, Latin American governments tend to assess US-China affairs through a geopolitical lens, one that creates an equivalence between the United States and China as two great powers vying for hegemony. Consequently, US regional security concerns vis-à-vis China are generally either dismissed or portrayed as attempts to curtail China’s expansion. Given the United States’ checkered history of intervention in Latin America and the Caribbean, countries in the region have valid reasons to be skeptical when the United States comes knocking with a security agenda. Washington’s efforts to put a security frame around a conversation about China—its government and its companies—are bound to fail.

In a 2023 interview for *Foreign Policy*, Eric Farnsworth, vice president of the Americas Society/Council of the Americas, a business organization focused on Western Hemisphere political and economic affairs, stated, “If the United States doesn’t show up with a meaningful economic agenda for the region, the region is going to turn to people who will. And who’s the obvious choice? The one with the money: China.”<sup>41</sup> As the interviews conducted for this report suggest, Huawei’s expansion in Latin America is, in part, a confirmation of Farnsworth’s analysis.

The United States should focus on pursuing realistic objectives, and a viable goal is to reduce, not eliminate, China’s commercial footprint in the region. A step in that direction would be to frame bilateral ties around topics that are relevant to Latin American governments—such as economic development, foreign direct investment, and access to international financing—not around China and the threats it poses. In short, the United States’ policy for Latin America and the Caribbean should not be a China policy in disguise.

While the interviews provide a sense of Huawei’s strengths, they also shed light on its weaknesses. All the interviewees who had worked for Huawei as well as for one or more of its competitors said they strongly preferred working for the competitors. Likewise, those who had worked only for Huawei stated that, if the opportunity presented itself, they would prefer to work for a European, Japanese, South Korean, or US company. The main reason cited was better working conditions. Their preferences points to a competitive advantage for US companies and those from allied countries when it comes to acquiring and retaining top talent, and this should serve as an incentive for US companies to invest in the region.

Overall, the United States should focus on the opportunities that will arise from a burgeoning telecommunications sector in Latin America and the Caribbean rather than dwelling on the accomplishments of Huawei or other Chinese ICT companies. As of 2021, 96 percent of the

population in Latin America had access to mobile coverage, with 70 percent—some 440 million people—using mobile phones.<sup>42</sup> Meanwhile, governments and service providers continue to invest in connecting the remaining 230 million people who face barriers to using a mobile phone that are unrelated to coverage. US agencies such as the International Development Finance Corporation can help bolster private-sector investment in these areas. Likewise, the US Agency for International Development would do well to focus part of its portfolio in Latin America and the Caribbean on the development of telecommunications infrastructure, especially in hard-to-access areas. These kinds of efforts would address local needs and, at the same time, offset China's participation.

In tandem with infrastructure development efforts, there is a significant opportunity to support the tech start-up market in Latin America. A 2021 report by the Inter-American Development Bank revealed that this market grew exponentially over the previous decade, reaching a market value of \$221 billion in 2020.<sup>43</sup> Over 1,000 tech start-ups have collectively raised \$28 billion, with many focused on digital technologies that compete directly with Huawei and other Chinese ICT firms in areas such as data storage and financial technology services.<sup>44</sup> With over 245,000 employees and significant contributions to the region's GDP, these companies represent a vital front where the United States, already a leading investor in Latin American start-ups, can further its engagement.<sup>45</sup> By fostering a diverse and robust tech-service market, the United States can help reduce the region's dependency on Chinese technology, including Huawei's. This strategic approach of supporting both infrastructure development and start-up growth could effectively counter Huawei's dominance in the region while promoting economic growth and technological innovation.

In light of these insights, the United States should adopt a multifaceted strategy that addresses the complex dynamics at play in Latin America and the Caribbean. Rather than focusing solely on countering Huawei and China's influence, the United States should capitalize on its technological prowess and its capacity for fostering ICT innovation and development. By investing in and collaborating with the vibrant tech start-up ecosystem in the region, the United States could present an attractive alternative that resonates with the region's needs and priorities. Such an approach is likely to yield more substantial and enduring partnerships than is a strategy centered on geopolitical competition. In doing so, the United States would not only contribute to the technological and economic advancement of Latin American and Caribbean countries but also foster a robust and diverse market that is less susceptible to the influence of any single external player. This balanced, proactive approach aligns with both the aspirations of Latin American and Caribbean nations and the long-term strategic interests of the United States.

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