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Understanding the Emerging Era of International Competition Through the Eyes of Others

Country Perspectives
This report summarizes the findings of a RAND Corporation study on the character of the emerging era of international competition. It is the second of two reports in which authors examine the nature of that competition, assess the perspectives of the major powers, and evaluate its military, economic, geopolitical, and informational components. The first report presents a general understanding of the character of international competition in general and some initial hypotheses about the current version of that competition.¹

This report should be of value to the national security community and interested members of the general public, especially those with an interest in the future of the international system and the U.S. role in dealing with rising competition.

This research reported here was commissioned and sponsored by the Director of Strategy, Concepts and Assessments, Deputy Chief of Staff for Strategic Plans and Requirements. It is part of a larger fiscal year 2018 study, entitled *America and Strategic Competition in the 21st Century*, that assists the Air Force with executing the Strategic Master Plan.

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Summary

Issue

The current focus of U.S. national security strategy is built around the expectation of a new era of intensifying international competition. The expectation of such a competitive era raises critical questions about how such an era might look or unfold. To assess these questions and provide a more detailed evaluation of the emerging era of competition, the authors evaluated how the competition would look through the eyes of other major powers, beginning with the primary challengers to the U.S.-led international order.

Approach

The authors surveyed four basic elements about each major actor: the country’s basic character as an actor in this drama; the country’s essential goals and objectives in the competition; its view of the unfolding competition; and its strategy for success. To inform this evaluation, the authors conducted secondary-source research on countries’ strategies, perspectives, and interests. The authors also visited nine countries and held discussions with country experts in the United States covering four more nations.

Primary Findings

- Challenger nations—China, Russia, and Iran—are determined to claim greater international influence and reduce U.S. power—and, in China’s case, become the preeminent power in Asia. All three are “aggrieved” powers dissatisfied with the current balance of power and influence in the international system. Yet none of these states should be viewed as an unqualified, militaristic revisionist, or predator state.
- Aggressive, quasi-revisionist states generally favor action below the threshold of a major conflict and use nonmilitary tools of statecraft to achieve their ends. Doctrines and concepts promoting this idea are common to Russian and Chinese national security debates, and the recognition of this trend is common to the national security strategies of other major powers.
- The international system remains dominated by status quo powers. International politics remains characterized by a predominant group of states committed to integrated global
trade, nonaggression, peaceful resolution of disputes, and collaboration in shared challenges.

- However, revisionist sentiments serve as drivers of a competition in many places beyond Moscow, Beijing, and Tehran. Many other countries—including India, Brazil, Vietnam, and even France—believe that the postwar order has been excessively dominated by the United States and that the moment has arrived for a more-equal sharing of power.
- The appetite for explicit or implicit cooperation with the United States remains strong.
- Perceptions of the degree of immediate threat posed by Russia and China vary significantly, and few countries are fully aligned with the level of global competitive intensity outlined in U.S. strategy and policy.
- There is a profound allergy to alliances among most of the emerging nations, including India, Indonesia, Mexico, Brazil, and Vietnam. All of them have principles of autonomy and independence embedded firmly in their identity and national security doctrine. These views also limit the degree of influence China or Russia is likely to achieve with these countries: There are natural constraints on the regional power these countries can attain.
- All major powers in the international system today want to preserve the postwar, rules-based order, which they perceive as being very much in their interests. Many have integrated the preservation of a rules-based order firmly into their national security strategies and believe that it helps them preserve their core interests.
- National security strategies and perspectives of many countries emphasize the importance of becoming key nodes or hubs of networks.
- The coronavirus disease 2019 (COVID-19) pandemic has not fundamentally altered these perceptions.

**Implications for the U.S. Air Force**

Based on those findings, the RAND team offered specific implications for the U.S. Air Force. These include the following:

- Security assistance and military-to-military engagement remain important.
- The Air Force would be well-served to deepen partnership arrangements with a handful of specific emerging regional powers.
- Strengthening the service’s suite of tools for the gray zone should be a priority.
- Air Force engagement activities should be prioritized based on criteria beyond those associated with high-end conflict.
- The Air Force’s capacity for “over-the-horizon deterrence” is likely to be increasingly in demand.
- The Air Force should work to strengthen military-to-military ties with Russia and China.
Executive Summary

This report is the second of two reports in which we evaluate the emerging strategic competition, focusing on the relevant views and policies of key countries around the world. We seek to deepen the thinking about the nature of the emerging strategic competition by focusing on the roles and perspectives of the states that will conduct it. We consider four categories of countries: challenger states (specifically, three of the four countries identified by the U.S. National Security Strategy as U.S. rivals); U.S. allies; global emerging democracies; and important other actors. We examine the essential character of the actors; their goals, principles, and grand strategy; their view of Russia, China, and Iran; and their relations with the United States.

To inform this evaluation, we conducted secondary-source research on countries’ strategies, perspectives, and interests. We also visited nine countries and held discussions with country experts in the United States covering four more nations.

We used several criteria to identify a list of key players in the emerging environment. These criteria led us to an initial set of focus countries, listed in Box ES.1. Of these, the United States and China loom over the others as the two dominant actors in the emerging era, but many states will have leading roles on specific issues. Although there could be some dispute around the edges of this list, broadly speaking, this set of countries stands out from other contenders.

This executive summary surveys the broad themes that emerge from this work, the strategic-level implications for the ways in which the United States should conceive of the emerging era.

This report does not specifically address the role of the United States. It is designed to help U.S. analysts and policymakers better understand the perspectives of other leading countries on the potential for rising competition. However, an important part of that dynamic is the view of the United States and its approach to national security on the part of others. Although

**Box ES.1. Countries of Focus in This Report**

Australia, Brazil, China, France, Germany, India, Indonesia, Iran, Japan, Mexico, Russia, Saudi Arabia, Turkey, United Kingdom, United States, Vietnam

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1. These criteria include economic and military weight—the world’s top countries in terms of gross domestic product (in purchasing power parity terms as of 2016) and military expenditure; projected global economic status in 2040 to 2050; degree of regional or global geopolitical ambitions; and role in international institutions and processes. These criteria are more fully explained in Chapter One.
most U.S. officials tend to view their nation as a status quo country—one whose main goal is to preserve stability and existing norms and rules—we found that many others (not only Russia and China) view the United States as perhaps the leading revisionist power in the world. This perception stems from a host of U.S. actions to sometimes forcibly promote the norms of the postwar order, including democracy and nonproliferation.

Understanding the Challengers: China, Russia, and Iran

Several major themes emerged from our review of the character, goals and ambitions, strategies, and view of competition of China, Russia, and Iran.

First, these three challengers are determined to claim greater international influence and reduce U.S. power—and, in China’s case, to become the preeminent power in Asia. China, Russia, and Iran are “aggrieved” powers dissatisfied with the current balance of power and influence in the international system. All of them have historical identities and present self-conceptions that make them believe that they have a rightful place among the world’s great powers. The challengers’ drive for greater prominence is supported by a related perception—that the United States is a declining power.

Second—and equally important—is that none of these states should be viewed as an unqualified, militaristic revisionist, or predator state. Apart from China’s stated intentions regarding Taiwan, none has immediate territorial or other ambitions that currently call for large-scale military aggression. All have mixed attitudes toward existing international norms, rules, and institutions rather than seeking the complete destruction of the current order. China, Russia, and Iran continue to believe that the costs and risks of major aggression would make it counterproductive and have developed strategies to seek their goals below the threshold of major conflict.

In the case of China, for example, its leaders continue to assert that a stable and peaceful international environment remains a precondition for the leaders’ top priority of national development. Furthermore, recovery of contested territories ranks secondary in importance to the focus on maintaining the stable environment needed to enable the development of comprehensive national power. For this reason, China has relied on principally peaceful, albeit occasionally coercive, means of incrementally strengthening control of these regions while avoiding actions that could precipitate an unwanted conflict. For these and other reasons, China is best viewed as a selective revisionist—a nation determined to obtain greater degrees of regional predominance and global influence without wrecking the prevailing order altogether. Whether it will continue to be constrained by the limits on its aggressiveness remains to be seen; this risk is a leading source of the growing concern about China’s direction.

Russia, too, is dissatisfied with the current situation in the international system and seeks to force a shift. Russia sees itself as often responding to perceived Western revisionism rather than pursuing its own revisionist agenda. Most broadly, Russia does not seek a generalized confrontation with the United States or the West. Apart from selective and targeted employment of direct military force, it is anxious to pursue these objectives without risking major war.

One implication of these limitations and constraints is that these states prefer to pursue their ambitions below the threshold of major conflict. Much of the substance of the overlapping competitions is likely to be played out in what has been called the gray zone rather than in high-end combat.
Third, it is important for U.S. strategists to take seriously the fact that these challengers—and many other major countries—view the United States as a major source of disruption in the current international system, on a par with China, Russia, and Iran. The three challengers are unquestionably taking aggressive actions and violating international norms, but all of them have powerful narratives of victimization and grievance and believe that they are the beleaguered party in the competition with the United States. Their obsession with regime security gives them an almost paranoid degree of concern about U.S. revisionist strategies. This complicates the task of shoring up international rules and norms in the face of the challengers’ pressure.

Fourth, these three challengers are not a unified bloc. They coordinate when it suits them and have recently made public commitments to enhanced cooperation, but their goals and interests are often very distinct and sometimes in conflict. The level of coordination among the three should not be exaggerated. These facts reinforce a general lesson derived from this study: The United States should view the emerging era as a complex, multifaceted set of overlapping competitions, not a single unified “global competition.”

Fifth, this survey reinforces another message of the first report stemming from this study: China clearly stands out as the dominant competitor of the emerging era—the one nation with the broadest ambitions, most expansive self-conception, most elaborate suite of tools of statecraft, and most resources to undertake a competition.

U.S. Allies: United Kingdom, France, Germany, Australia, and Japan

This analysis also considered the current positions on international politics and the emerging era of several U.S. treaty allies. This survey produced several leading themes.

First, even among U.S. allies, there is a complex mosaic of threat perceptions relative to the U.S.-nominated challenger states. Since the end of the Cold War, for example, France has often supported the engagement of Russia to bring it into the European security architecture rather than leave it alienated from Europe. Japan has far less concern for Russian political meddling and other issues. The divergences on China and Iran are even more stark, though narrowing to a degree thanks to belligerent Chinese actions.

Second, key U.S. European allies are embroiled in domestic and regional socioeconomic challenges that obstruct their desire and ability to play a leading role in competitive dynamics. The obvious current example is the social disruption and immense fiscal price of the coronavirus disease 2019 (COVID-19) pandemic. Another example is the impact of Brexit on the United Kingdom (UK). More generally, apart from current crises, domestic politics constrains Germany’s and France’s abilities to take leadership roles on international issues.

Third, all U.S. allies—and many other major powers—continue to place a stable, rules-based international order at the center of their national security strategies. The UK remains firmly committed to the idea and practice of a Western-led liberal order and to playing a notable role in its preservation. France continues to emphasize the importance of the postwar international order as the basic framework for international politics; Australia places a large emphasis on multilateralism and a “rules-based global order.” Germany and Japan may count as the most committed defenders and advocates of the postwar, rules-based order: Both have grounded their national security strategies in the success and stability of this order.
Fourth, for the most part, these countries continue to emphasize nonstate threats as equal to, or even more important than, state competition as a national security concern. These threats include such issues as terrorism, climate change, migration, and social instability in neighboring regions.

Fifth, all these allies continue to emphasize their relations with the United States as a centerpiece of their national security strategies in a more-competitive era—but that commitment is waver-ing at the edges. However, there is also more evidence of hedging and strong signals that U.S. allies are concerned that the current unpredictability in U.S. strategy and policy could worsen.

Sixth, many U.S. allies have a similar conception for enhanced influence: building networks of cooperative, like-minded status quo powers. France’s recent strategy documents call for enhanced strategic partnerships with important developing nations and major powers in the Middle East, with India, Australia, Japan, Singapore, Indonesia, New Zealand, Malaysia, and Brazil. British documents and thinking emphasize a response grounded in the UK’s position as the hub of multiple networks—military, economic, cultural, commonwealth, and diaspora. Germany has emphasized construction of multilateral ties as a leading security strategy.

**Emerging Powers: India, Brazil, Indonesia, Mexico**

Our analysis next turned to the roles of some of the important rising powers that will rank among the top ten to 15 economies in the world within roughly a decade. They will represent a major share of world power by 2040, and their orientation and policies could go a long way toward shaping the nature of the competitive international system. Our analyses of their current character, strategies, and goals produced several findings.

First, these are all essentially status quo powers—that nonetheless demand some redistribution of power in the international system. None of these states has major unresolved territorial issues (apart from India’s border dispute with China) or urgent territorial ambitions. All maintain relatively modest defense establishments—in some cases, designed mostly for internal security. Yet these powers also believe that the postwar order remains too heavily tilted toward U.S. influence. At the United Nations (UN), for example, India is a somewhat revisionist power: As the nation projected to become the most populous in the world within a decade, India considers itself a natural claimant to a seat on the UN Security Council (a position supported by the United States, the UK, France, and Russia—but steadfastly opposed by China). Brazil also has the national ambition to rank among the top-tier powers: It sees a first-world global order in flux as the United States’ unipolar moment recedes and sees an opportunity to take its place as a first-tier power primarily via economic development and institutional participation.

Second, each of these emerging powers counts nonalignment as a leading principle of foreign policy. India was a leader of the nonaligned movement and strictly avoids formal alliances, a mindset that has constrained its degree of military engagement with the United States. After gaining independence in 1945, Indonesia established a foreign policy identity known as “free and active” (bebas aktif), which entailed protecting Indonesian national interests by not aligning with major world powers. As a result of the bebas aktif approach, Indonesia has maintained an unwavering opposition to formal alliances or defense pacts. Mexico is equally noninterventionist in its foreign policy: It did not join the U.S. coalition against the global war on terrorism nor did it support the U.S. invasion of Iraq in 2003.

Partly as a result of this nonalignment principle, none of these nations is interested in being recruited into U.S.-led confrontations with China, Russia or Iran. Each would prefer
to hedge and sustain a middle position between other competitors. Even countries that view China as a threat (such as India and Indonesia) also sustain significant trade balances with Beijing and would prefer to manage the relationship short of outright rivalry.

Third, like formal U.S. allies, these emerging powers have highly varied threat perceptions which do not match the U.S. articulation of challengers. India is perhaps the leading example of this reality: Throughout the Cold War, the Soviet Union was India’s primary great-power patron, and, even in the post–Cold War era, Russia maintained a close friendship with India, which also views Iran as a historical friend and partner. Brazil has not joined in Western sanctions against Russia and has generally maintained neutrality in the disputes between Russia and the West. Despite China’s growing assertiveness in the South China Sea and growing Sino-Indonesian tension over the Natuna waters, Indonesia has not officially identified China as a security threat.

Other Key Actors: Vietnam, Turkey, and Saudi Arabia

Finally, we considered the perspectives of three key regional actors—Vietnam, Turkey, and Saudi Arabia. The views of these states point to several general themes.

First, these states, like the emerging democracies, are fundamentally status quo in their orientation, not seeking to upset the existing order. Vietnam, for example, is a member and active participant of all the major global and regional security and economic forums, including the UN, World Trade Organization, International Monetary Fund, World Bank, and the Association of Southeast Asian Nations, among others. Although Vietnam holds certain views on freedom of navigation under the United Nations Convention on the Law of the Sea that are at odds with the U.S. interpretation, these views are tertiary to the fundamental nature of the international system and do not suggest a country that would be considered “dissatisfied” with the global order.

Second, none of these states has any appetite for being drawn into an intense global competition. All would prefer to hedge and bide their time rather than throw their weight behind one or the other side of the competition, especially in Asia. Like the emerging democracies, some of these countries have deeply embedded concepts of nonalignment.

Third, as with the major emerging democracies, there is no uniform tendency toward hostility or competition toward Russia, China, or Iran. Competitive dynamics are specific to individual relationships. Turkey, for example, has historically viewed Russia as a security threat and has sought out Western powers for security guarantees—but Ankara’s relations with Tehran are characterized by alternating cooperation and competition on a wide host of issues that defy easy classification, and its ties to Beijing are cordial on economic issues but contentious on ethnic questions. Saudi Arabia’s first and most important foreign policy goal is to oppose Iran—but its approach to China has been far more nuanced.

Fourth, the theme of domestic politics and its implications is common across many of these important regional powers and reflects a larger theme in world politics. Countries, such as Turkey and Saudi Arabia, are undergoing significant domestic political transitions or upheavals that shape their view of their role in the world and the nature of the emerging era. These dynamics introduce significant degrees of unpredictability into their external policies and relations with all of the primary participants in the competition.
Overall Lessons for the Strategic Competition

Our analysis outlined several possible implications for the United States from these country perspectives on competition.

1. The international system remains dominated by status quo powers. International politics remains characterized by a predominant group of states—from the EU, India, Japan, and South Korea to Australia and New Zealand, most of Latin America, Indonesia, and others—committed to integrated global trade, nonaggression, peaceful resolution of disputes, and international collaboration in shared challenges. To the extent that the United States still provides leadership for this informal coalition, this role will provide tremendous competitive advantages in the overall competition.

2. However, revisionist sentiments serve as drivers of a competition in many places beyond Moscow, Beijing, and Tehran. Many other countries—including India, Brazil, Vietnam, and even France—believe that the postwar order has been excessively dominated by the United States and that the moment has arrived for a more-equal sharing of power.

3. The appetite for explicit or implicit cooperation with the United States remains strong. Our research confirmed several places where bilateral relations with the United States remain strong and where countries had an appetite for cooperation, including India, Indonesia, Mexico, and Vietnam.

4. Perceptions about the degree of immediate threat posed by Russia and China vary significantly, and few countries are fully aligned with the level of global competitive intensity outlined in the U.S. National Security Strategy and U.S. National Defense Strategy.

5. Several rising democracies underexpress their national power. Yet some of them (notably India and Brazil) see themselves as rapidly emerging into first-tier status (even while reserving the right to claim continued developing status) and increasingly will be looking for the influence and voice that come with that position. They are likely to enhance their defense efforts in coming years, providing opportunities for expanded partnership programs.

6. All major powers in the international system today want to preserve the postwar, rules-based order, which they perceive as being very much in their interests. Many have integrated the preservation of a rules-based order firmly into their national security strategies and believe that it helps them preserve their core interests.

7. Arguably the most common medium-term ambition on the part of both challengers and rising powers is a thirst for status—for the country to affirm or reestablish its “rightful place” in world politics. This is true of both the challenger states (such as China, Russia, and Iran) and many emerging democracies, such as Brazil.

8. Aggressive, quasi-revisionist states generally favor action below the threshold of major conflict and the use of nonmilitary tools of statecraft to achieve their ends. Doctrines and concepts promoting this idea are common to Russian and Chinese national security debates, and the recognition of this trend is common to the national security strategies of other major powers.

9. Domestic affairs are driving international posture in powerful ways in many countries. Some countries are largely focused inward, such as the UK, Germany, Mexico, Brazil, and Indonesia. Partly as a result of this focus, there is significant flux in the domestic
profiles of several important strategic actors, including Germany, Mexico, Turkey, and Saudi Arabia.

10. *There is a profound allergy to alliances among most of the emerging nations, including India, Indonesia, Mexico, Brazil, and Vietnam.* All of them have principles of autonomy and independence embedded firmly in their identities and national security doctrines. These views also limit the degree of influence that China or Russia is likely to achieve with these countries: There are natural constraints on the regional power these countries can attain.

11. *National security strategies and perspectives of many countries emphasize the importance of becoming key nodes or hubs of networks.* Establishing such a role—in economic, technological, educational, military, geopolitical, cultural, or other terms—is the focus of many countries’ strategies, whether explicitly or not.

12. *The COVID-19 pandemic has not fundamentally altered these perceptions.* The essential conceptions of interests and relationships that existed before the pandemic continue to prevail in the countries we examined. Views of China are hardening in multiple countries, and the pandemic’s early history has contributed to that, but this is mostly for broader strategic reasons. As of early 2021, the pandemic has not changed the basic geopolitical perspectives of any major actors.

These findings add up to two overarching themes that we draw from this analysis. First, the form of competition emerging so far is what could be described as constrained or restrained competition—clearly intensifying but still constrained by barriers of the risks of escalation, especially involving nuclear weapons; the gravitational force of an integrated and interdependent global economy; and perceived international norms. A primary U.S. goal should be to sustain and strengthen these constraints on more-intense competition. This can take several forms: continuing to invest in deterrent capabilities to reduce opportunities for large-scale aggression; sustaining international rules and norms that can be used to constrain aggression through punishment, as occurred after Russia’s invasion of Ukraine in 2014; and investing in public diplomacy and information campaigns to increase awareness of Russian and Chinese malign activities.

A second main theme is that many of the sources of power in this persistently interdependent, networked international system will come from serving as the hub of various networks. Many states perceive a competition in this regard, one in which the United States now enjoys the status as the dominant “hub” in such areas as international financial transactions, international monetary issues, internet governance, and much more. Our research on the perspectives and policies of many key players in the competition suggests that competitive advantage will continue to come from serving as such a hub, in general and on specific issues.

**Implications for the U.S. Air Force**

The final question is, how can defense capabilities—and specifically U.S. Air Force capabilities—serve these two goals? Our analysis suggests several specific implications for the Air Force.

1. *Security assistance and military-to-military engagement remain important.* Although its effects cannot always be quantified, the broad suite of tools and activities under the
general rubric of U.S. security assistance has historically been an important tool for placing U.S. power at the center of bilateral and multilateral ties, which add up to potential global networks of friends, allies, and partners. Our analysis suggests that such an approach remains viable and can continue to provide the United States with competitive advantages.

2. The Air Force would be well-served to deepen partnership arrangements with a handful of specific emerging regional powers. India (despite the constraints and its traditional relationship with Russia) is an obvious candidate, as are Brazil, Indonesia, and South Africa. Even if the cooperation can only be enhanced at the margins, it could provide an important boost for U.S. geopolitical initiatives.

3. Strengthening the service's suite of tools for the gray zone should be a priority. As other RAND Corporation (and specifically Project AIR FORCE) research has suggested, challenger states hope to play out their aggressive designs below the threshold of major conflict, and many other states explicitly expect this to be the center of gravity of the competition. Our analysis of both the challenger state strategies and the concerns voiced by targets of their influence-seeking activities suggests that these tactics are likely to remain a centerpiece of the U.S. competition with both Russia and China.

4. Air Force engagement activities should be prioritized based on criteria beyond those associated with high-end conflict. In considering which potential partners should rise to the top of priority lists for security assistance and other forms of engagement and partnering, our analysis—as well as the broader assessment of the emerging strategic competition in this project—suggests, that the Air Force should consider a variety of factors, including important criteria derived from partners' geopolitical influence. Much of the emerging competition will be played out below the level of major war. Were the Air Force to prioritize countries solely on the basis of their prospective ability and will to share the burden of such high-end fights, it would lose potentially important roles in lower levels of competition.

5. The Air Force's capacity for “over-the-horizon deterrence” is likely to be increasingly in demand. Many regional countries want the United States to support them and be ready when called upon—but do not want excessive U.S. local presence. The classic U.S. model of regional warfighting, which might be described as “hold and reinforce,” is likely to become less and less relevant given the combination of other powers' technological capabilities and doctrinal innovations. Finding a new solution is likely to demand a form of over-the-horizon balancing that should play to Air Force capabilities.

6. To the degree possible, the Air Force should work to strengthen military-to-military ties with Russia and China. U.S. friends and allies do not welcome unconstrained confrontation, and signals that the United States is working to prevent direct conflict even as it competes will be important to sustaining support for the overall U.S. strategy. These enhanced ties could be consultations of regional component commanders, visits of service chiefs to enhanced rules of engagement in service domains (in this case, air intercepts), or efforts to foster contact in military education (if the overall relationship allows). The current status of both relationships will impose intense limits on such ties, but even marginal contacts can signal a desire for stabilized relations.
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<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tr>
<td>BRICS</td>
<td>Brazil, Russia, India, China, and South Africa (association of countries)</td>
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<td>CCP</td>
<td>Chinese Communist Party</td>
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<td>COVID-19</td>
<td>coronavirus disease 2019</td>
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<td>EU</td>
<td>European Union</td>
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<td>G20</td>
<td>Group of Twenty</td>
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<td>ISIS</td>
<td>Islamic State in Iraq and Syria</td>
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<tr>
<td>NAFTA</td>
<td>North American Free Trade Agreement</td>
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<td>OPEC</td>
<td>Organization of the Petroleum Exporting Countries</td>
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<td>UK</td>
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CHAPTER ONE

Introduction and Methodology

The focus of U.S. national security policy, from the U.S. National Security Strategy through the initial statements and documents of the new Biden administration, has become built around the expectation of a new era of intensifying international competition. An earlier report from this research project examined the character of this emerging competition through the lenses of theory and history. But an essential aspect of understanding any international system is to grasp the character and perspectives of its major actors—the essential identity of countries that comprise the system, their goals and strategies, and how they view the nature of the competition. In this report, we seek to deepen the thinking about the nature of the emerging strategic competition by focusing on the discrete roles and perspectives of several especially significant nations that will participate in it.

We divide our analysis of countries into four categories: Challenger states, formal U.S. allies, global emerging democracies, and other key actors. Each of the country sections contains five basic elements: A brief discussion of the essential character of the nation as a global geopolitical actor; a discussion of its goals, principles, and strategy in approaching the competition; its view of the major challenger nations (specifically, Russia, China, and Iran); its relations with the United States; and a summary section.

To assess the perspectives of other countries, we conducted secondary-source research on their strategies, perspectives, and interests but also visited nine countries and held discussions with country experts in the United States covering four more nations. We reviewed national security strategies and policies, speeches by national leaders and senior officials, and the extensive literature on the evolution and status of the foreign policies of these nations. In our field work, we focused especially on the emerging view of the strategic competition, including the reaction to the National Security Strategy and National Defense Strategy.\(^1\)

We focused our research on countries likely to have a disproportionate effect on the outcome of any strategic competition—what might be described as the great or major powers of the era. We used several criteria to identify a list of key players in the emerging environment. These criteria were derived from classic literature and current indexes of national power,\(^2\) which point to several consistent factors in assessing the level and importance of countries, as well

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\(^1\) The primary research for this study was concluded in late 2018 and early 2019. After the editorial and review process, we updated the analysis in August–September 2020 to take into account any new developments, including the coronavirus 2019 (COVID-19) pandemic.

as indicators of the degree to which a country plays an active and influential role in regional and/or global politics. The criteria we used were

• fundamental weight, including economic—the world’s top countries in terms of the gross domestic product (in purchasing power parity terms)
• military weight (the world’s top countries by military expenditure)
• projected global economic status in 2040 to 2050, to provide a sense of rising powers in a changing global power balance
• the degree of regional or global geopolitical ambitions, an admittedly subjective indicator fed by recent foreign policy statements and strategies of key countries
• role in international institutions and processes, in terms of both simple membership and leadership roles in those institutions (beginning with the Permanent members of the United Nations [UN] Security Council).

These criteria led us to an initial set of focus countries, listed in Box 1.1. Of these, the United States and China loom over the others as the two dominant actors in the emerging era, but many states will have leading roles on specific issues. Although there could be some dispute around the edges of this list, broadly speaking this set of countries stands out from other contenders.

In this report, we will use various terms to describe categories of states, terms derived from both classic international relations literature and current strategic analysis. The most important terms include the following:

• A revisionist state is a state dissatisfied with the current distribution of power or structure of international relations and determined to make changes, whether through military or non-military actions, to those power relations. Different states adopt varying degrees and types of revisionism—some, for example, are selective or restrained in their revisionist tactics, others are highly militaristic and aggressive.
• A status quo power, by contrast, is a state that is relatively satisfied with at least the dominant elements of the current structure and power relations of the international system and its own place in that system.
• There are many definitions of what constitutes a great power in world politics. Some definitions focus on absolute levels of strength relative to other leading states; others look for a comprehensive range of capabilities across many elements of national power, including both economic and military factors. In this study, we make no effort to offer an objective

Box 1.1. Countries of Focus in This Report
Australia, Brazil, China, France, Germany, India, Indonesia, Iran, Japan, Mexico, Russia, Saudi Arabia, Turkey, United Kingdom, United States, Vietnam
definition of what constitutes a great power. The term is used in reference to the perceptions of major actors of their own role and position in the system, and their aspirations. Several countries examined in this report believe themselves to be, and demand recognition as, great powers.

- In various places, the analysis refers to the view of countries about the postwar international order or rules-based international order. This refers to the post–1945 international order, built around the UN and two primary norms of nonaggression and free and open trade. Different countries have slightly different visions of precisely what the order entails, but many have made the order a central pillar of their national security strategies—or a primary focus of their ambitions to enhance their influence.

- Several of the countries profiled in this report are characterized as middle powers. There is no consistent definition of middle powers, though they are generally referred to as occupying “an intermediate position in the power structure of the states system.” These are states generally agreed to fall below the top ranks of great powers but which nonetheless have significant regional or single-power-measure influence in the international system.

- Grand strategy, which we discuss in the context of the national approaches to competition, is a country’s general concept for applying the comprehensive means of statecraft to achieve a country’s most general national objectives.

The initial research for this study was completed in late 2018. After a review and clearance period, the report was then prepared for publication and updated in late 2020. We have sought to bring as many references as possible up to date. The study’s basic findings and conclusions are unchanged.

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CHAPTER TWO
Understanding the Challenger States

The essential baseline of any competition is to be found in the character of the main competitors. Therefore, our country assessment began with three of the four competitors—China, Russia, and Iran—to survey their intentions, strategies, and character and thereby better understand the nature of the emerging competition.¹ The interim National Security Strategic Guidance acknowledged that the “distribution of power across the world is changing” and characterized China as the “only competitor” that could “mount a sustained challenge to a stable and open international system.”² The goal was not to render a conclusive judgment on how much of a threat each will pose, but rather to offer insight into just what kind of competition the United States will be engaged in with each challenger.

China

China clearly stands out as the dominant challenger state—the nation with the broadest ambitions, most expansive self-conception, most elaborate suite of tools of statecraft, and most resources to undertake a competition.³ China’s leadership, led by President Xi Jinping, has advanced the vision of a “Chinese Dream” in which the country revitalizes into a great power by mid-century under Chinese Communist Party (CCP) rule.⁴ China’s historical experience informs its strategic ambitions. Since the late 19th century, political thinkers and activists have upheld an ambition in which the country recovers its historical leading role in Asia as a “rich and powerful” nation.⁵

To realize these aims, authorities have largely avoided wars and costly international obligations in favor of focusing on national development for decades. As China’s power has expanded, however, Chinese leaders have rethought key tenets of the country’s foreign policy. Shifting toward a more-activist stance abroad, Beijing has prioritized the pursuit of global tech-

¹ We do not treat North Korea in this analysis because it is largely a discrete challenge with implications for the larger competition but not a major competitor with regionwide ambitions.


³ For a recent statement of the comprehensive China competitive challenge, see Aaron L. Friedberg, “Competing with China,” Survival, Vol. 60, No. 3, June–July 2018, pp. 7–64.


nological leadership, integration of the Eurasian landmass under the Belt and Road Initiative, incremental consolidation of control over disputed territories, expansion of influence within existing institutions and creation of alternatives as need arises, and the creation of a supportive network of partner countries around the world. There is little question that Beijing seeks a degree of influence and predominance in Asia that will, at a minimum, create significant tension with U.S. interests and objectives.

China’s resources, capabilities, and commitment to achieving its strategic aims combine to make the country a premier global competitor. In 2010, China surpassed Japan to become the world’s second-largest economy. The country has a diversified economy, major industrial power, exports of agricultural products, and an expanding high-tech sector. China’s military is among the world’s largest, with a defense budget of $178 billion in 2020.

China will need to confront significant hurdles to continue its growth and stability. Chinese leaders face growing challenges in managing the diverse and occasionally contradictory impulses to expand the nation’s influence and competitiveness yet still avoid conflict and maintain domestic and international stability. Rapid economic growth has brought prosperity, but it has also exacerbated problems of social inequality, environmental despoliation, and rapid urbanization. A rapidly aging workforce and inadequate social welfare programs pose a serious threat to the country’s long-term growth. Domestic demand for energy has outpaced supply, and the country since the mid-2000s has relied on imports to meet its needs. China’s pursuit of strategic competition has also fueled tension with the United States and its allies, especially Japan. Tensions with India have also increased following a brutal border clash that resulted in the deaths of 20 Indian soldiers in June 2020.

Although the CCP continues to operate through a Leninist political system featuring party penetration and control of virtually all government and social groups, the party has so far demonstrated impressive resilience and adaptability. The CCP has shifted the locus of legitimacy away from Marxist ideology toward the deliverance of economic prosperity and national rejuvenation. The combination of economic prosperity and nationalist policies appear to resonate with the people, with Western polls indicating a large majority of Chinese people support President Xi Jinping and the CCP. In March 2018, China’s government abolished term

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6 The Belt and Road Initiative is a major Chinese geoeconomic effort aimed at expanding markets and connectivity across Asia, Africa, and Europe through land and maritime routes.

7 China’s population, the world’s largest with nearly 1.4 billion people in 2016 has seen dramatic improvements in per capita income, rising from an average under $200 in 1980 to over $8,000 in 2016; see World Bank, “Population, Total,” webpage, undated-b. Even adjusting for purchasing power parity, however, China still placed as the 106th wealthiest country in 2016. The population is largely literate, with a literacy rate of 95 percent, and professional and technical expertise continues to increase; see Central Intelligence Agency, “World Factbook: Country Comparison: GDP–Per Capita (PPP),” webpage, undated.

8 Central Intelligence Agency, undated.


11 “Natural Resources,” People’s Daily, webpage, undated.


limits for the President of the People’s Republic of China, opening the way for Xi to maintain his rule indefinitely, steps that reflect the CCP’s confidence in its authoritarian system of politics and its antipathy toward liberal democratic values.\(^\text{15}\)

**Goals, Principles, and Grand Strategy**

China’s leaders have articulated three sets of important national, or what authorities call “core,” interests (核心利益): security, sovereignty, and development. According to the 2011 Peaceful Development White Paper, the first interest (security) concerns the country’s fundamental protection from danger and chaos. Threats in the mind of Chinese leaders include both existential dangers, such as those posed by nuclear annihilation, and challenges to the nation’s integrity and stability, such as those posed by groups that Beijing sees as terrorists or separatists. The concept of security also includes the maintenance of the country’s political system under CCP rule. The second interest (sovereignty) concerns the country’s ability to exercise authority over all geographic claims, including Taiwan, and the integrity of all land and maritime borders. Threats include challenges by rival claimants to disputed territories. The third interest (development) refers to access to the resources and goods required for the country to sustain economic development. Threats to that interest include disruption of key shipping lanes and instability in distant countries that endanger important natural resources and markets.\(^\text{16}\)

Beijing has shown an increasingly ruthless approach toward suppressing dissent within its borders. In recent years, officials have carried out a mass incarceration, torture, and mass sterilization of Uighur minorities in an effort to suppress their religious and ethnic identity.\(^\text{17}\) In June 2020, authorities passed a national security law that imperils Beijing’s rights and freedoms.\(^\text{18}\) However, Chinese interests extend beyond issues of territorial and sovereignty issues. Increasingly, Beijing seeks influence and status throughout Asia and at the global level that it regards as commensurate with its national power. This does not, at least in public discussions, imply an unrestrained assertion of power: Reflecting the country’s changing needs as a great power, Chinese leaders have increasingly discussed how the nation’s revitalization continues to depend on the country’s ability to shape a favorable international environment.\(^\text{19}\) In a September 2015 speech to the UN General Assembly, President Xi stated, “We cannot realize the Chinese dream without a peaceful international environment, a stable international order and the understanding, support, and help from the rest of the world.”\(^\text{20}\)

Authoritative policy documents emphasize the development of comprehensive national power as the foundation for achieving this vision.\(^\text{21}\) The 19th Party Congress report stated that

\(^{15}\) “China’s Xi Allowed to Remain ‘President for Life’ as Term Limits Removed,” BBC, March 11, 2018.


\(^{19}\) “Xi Eyes More Enabling International Environment for China’s Peaceful Development,” Xinhua, November 30, 2014.


\(^{21}\) The 19th Party Congress report, the CCP’s most important strategy document, defined the end state of the “China Dream” as a situation in which China has “basically achieved modernization.” More specifically, under this condition China is envisioned as having developed into a “great modern socialist country” that is “prosperous, strong, democratic, cul-
China aims to “dramatically improve” its economic and technological strength, to become a “global leader in innovation,” and to see its “cultural soft power” grow and gain “greater appeal.” In terms of military power, the 19th Party Congress outlined guidance to continue modernization of the People’s Liberation Army’s organizational structure, weaponry, and personnel development system. Politically, Chinese leaders make clear that they intend to uphold CCP rule. The 19th Party Congress called for the promotion of an ideology characterized by “patriotism” and “socialism.”22

In terms of international objectives, the 19th Party Congress report hinted at goals that both uphold the current order and revise aspects of it. On the one hand, the report affirmed China’s long-standing support for the UN to “play an active role in international affairs.” At the same time, the report criticized as “unjust” the balance of influence within the current order and called for changes to increase the “voice of developing countries” in international affairs. At the global systemic level, China has stepped up its criticism of U.S. international leadership and called for new political principles and values to guide government-to-government interactions. Xi declared that the five basic principles of peaceful coexistence should become the “basic norms governing international relations” and the “basic principles of international law.”23 In line with these points, the report mentioned that China seeks to build a global network of “partnership” countries and multilateral organizations premised on trade and a shared commitment to the values raised by Xi.24

In addition to reshaping the global international order around Chinese goals, Chinese leaders seek to establish the country’s primacy in Asia, in part through economic diplomacy. For example, Beijing has prioritized the integration of Eurasia through the Belt and Road Initiative.25 China has also offered a free trade agreement of the Asia-Pacific region as a trade standard for Asia. Beijing’s evolving approach to a more China-centric Asian order includes efforts to build multilateral frameworks with a leading role for China, including the Shanghai Cooperation Organization, Six-Party Talks, Conference on Interaction, and Confidence Building.26

Regarding contested territories, China’s goals likely entail recovery of Taiwan, the Senkaku Islands, the islands and reefs encompassed in the South China Sea’s “nine-dash line,”


23 Chinese Foreign Ministry, “Xi’s Speech at ‘Five Principles of Peaceful Coexistence’ Anniversary,” China Internet Information Center, July 7, 2014. Foreign Minister Wang Yi stated that the main obstacles to the promotion of international rule of law rested with countries that practiced “hegemonism, power politics and all forms of new interventionism”—all thinly veiled references to the United States (see Wang Yi, “China a Staunch Builder and Defender of International Rule of Law,” People’s Republic of China Foreign Ministry, webpage, October 24, 2014.


25 Liang Hui [梁辉], “Wang Yiwei: China’s Starting Point for Proposing One Belt, One Road Lies in Market Expansion [王义武:提出“一带一路”出发点是拓展市场],” International Herald Leader [国际先驱导报], April 7, 2015.

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and other disputed border areas. However, recovery of these territories ranks second in importance to the focus on maintaining the stable, peaceful international environment that Beijing still believes is required to enable the development of comprehensive national power. For this reason, China has relied on principally peaceful, albeit occasionally coercive, means of incrementally strengthening control of these regions while avoiding actions that could precipitate an unwanted conflict.

As Beijing has pursued an upgrade in the country’s mode of economic growth, leadership in science and technology has increased in priority. In 2015, China promulgated the Outline of the National Strategy on Innovation-driven Development, a national strategy to improve the country’s innovative industries. In 2017, China spent $496 billion on research and development, ranking second in the world. The country has 3,000 incubators for scientific and technological enterprises. China’s drive for predominance also includes numerous forms of predatory economic behavior that either violate or skirt international rules for trade and investment policy. These include economic espionage, theft of intellectual property, forced technology transfer, state purchase of technology companies, and much more. Finally, Beijing has employed a variety of political warfare techniques to achieve its goals, from classic propaganda to social media outreach to direct bribery and political interference. When the COVID-19 pandemic broke out around the world in early 2020, for example, Chinese agents reportedly spread disinformation that misattributed the origin of the virus to the U.S. military.

One of the major questions—which remains unanswered and, at this writing, not answerable with available information—is whether China will continue to pursue these ambitious goals gradually and pragmatically or become increasingly coercive and belligerent in its flouting of international norms. The evidence of the past decade and current trends is mixed: China demonstrates both a keen interest in not becoming the focus of regional balancing and a seeming disregard for international legal standards and norms of conduct in such areas as predatory economic policies. However, Beijing’s blatant disregard for Hong Kong’s autonomy with the passage of the national security law in 2020, mass incarceration of Uighur minorities in Xinjiang, willingness to engage in violence with neighbors as shown on the Indian border, and readiness to resort to diplomatic coercion and threats to cow European and other countries suggest a troubling trend toward a more-assertive revisionism.

View of Other Challengers

Chinese officials and scholars have anticipated the arrival of a multipolar world since the fall of the Soviet Union. Many scholars regarded the 2008 Global Financial Crisis as a crippling

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blow from which Western countries are unlikely to fully recover. Chinese official documents and commentaries agree that the diminished strength of Western countries and growing power of developing countries has resulted in a situation of deepening international competition. China’s Military Strategy White Paper noted an “intensifying” international competition for the “redistribution of power, rights, and interests.” Chinese theorists see the competition, centered in part on trade and investment, as especially acute in Asia. Chinese analysts suggest competition over leadership and influence has also expanded beyond Asia to the global systemic level between a U.S.-led order devoted to liberal value promotion and an alternative, Chinese-led order focused on sovereignty and the preservation of authoritarian state capitalist systems.

China’s views of Russia and Iran are complex but generally friendly. China shares many interests with Russia, but their cooperation is complicated by lingering distrust and differences on key issues. Beijing shares with Moscow a desire to reshape the international order in a manner that diminishes Western power. Both countries also share an opposition to Western alliances, especially along their respective peripheries, and they both uphold authoritarian rule as preferable to liberal democracy. They coauthor initiatives in international forums on important norms, such as cyber security and the weaponization of outer space. Trade relations are increasingly robust, with Russia swapping energy resources for Chinese consumer goods. Russia also has supported Chinese initiatives to deepen economic integration in Central Asia, such as the Belt and Road Initiative, even though Moscow has historically regarded the area as within its sphere of influence. For all these reasons, Chinese authorities highly esteem Russia as a key strategic partner on the global scene.

China does see limits to the relationship, however. Beijing does not seek an alliance with Moscow. And the effusive official praise for the relationship with Russia conceals some contempt in scholarly circles for a Russia widely regarded as in decline and with a degree of suspicion and distrust at the official level. However, given the shared threat perceptions of the

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36 Wang Jisi, a renown Chinese scholar at Beijing University, observed that a “struggle over rules” has “increasingly become the focus” of the bilateral competition between China and the United States. As examples, he noted that in the political area, China advocates for a “democratization of international relations” in which developing countries have a dominant voice. By contrast, he observed that the United States advocates for reinforcing the “liberal international order.” He concluded that “insurmountable obstacles” lay between the two competing rule sets. Similarly, in economics, he noted U.S. advocacy of international rules that “limit the development of state-owned enterprises, raise labor standards, allow the free flow of information, and protect intellectual property rights,” for which some rules “China cannot accept.” He similarly concluded that the economic relationship was marked by increasing “incompatibility.” In security terms, Wang similarly noted deepening disputes over issues of maritime sovereignty and freedom of navigation and cybersecurity. Wang Jisi, “China-U.S. Relations Enter a New Normal,” Global Times [环球时报], August 19, 2016.


38 Dmitri Trenin, “True Partners? How Russia and China See Each Other,” Center for European Reform, February 2012.
United States, it is likely that China will seek to continue to deepen the political, economic, and military relationship.

China has adopted a position of economic and military partnership with Iran. Disregarding U.S. threats, the two countries signed an agreement in 2020 that grants China preferential access to Iran’s oil in return for billions of dollars of investment in energy and infrastructure. It also called for joint training, exercises, and joint weapons development.39 The agreement builds on a shared political desire to weaken U.S. and Western powers, especially in their respective backyards. China and Iran also share a common historical narrative that regards the international system as unjust and dominated by Western powers.40 At the same time, Beijing has attempted to maintain a neutral stance regarding Iran’s feuds with Sunni countries by stepping up investment, trade, and assistance to Saudi Arabia and others. Despite the careful balancing, China esteems Iran’s historic willingness to stand up to the United States and appreciates Iran’s enthusiastic support for the Belt and Road Initiative. For these economic, political, and strategic reasons, China will likely find its policy stance regarding the Middle East start to tilt toward Iran in the coming years.41

Relations with the United States

Amid deteriorating relations, Chinese officials have stepped up criticism while calling on the United States to scale back policies that Beijing regards as threatening. A 2019 foreign policy white paper called on the United States to “abandon the Cold War mentality, and develop a proper understanding of itself, China, and the world.”42 China’s 2015 Military Strategy White Paper similarly warned euphemistically of “new threats from hegemonism, power politics and neo-interventionism,” which are generally understood to refer to the military actions taken by the United States outside UN authority.43 Commentaries in the Chinese media have been more aggressively critical. Articles routinely deride the United States as a declining state prone to irrational violence and hypocrisy.44 A typical commentary in the tabloid Global Times gleefully lashed the United States for its response to COVID-19, concluding that the “US’ very institutions and its boastful system have failed, miserably!”45 Analysts also routinely assert that Washington is determined to contain China. A commentary in the PLA Daily more pointedly stated, by contrast, “Containing and controlling China’s development has become a task of top importance for the United States to maintain its hegemonic status in the world.”46

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Chinese commentaries tend to blame “diehard political conservatives and military personages in the United States” who they claim remain “entrenched in Cold War mentality.” Yet despite the intensifying competition at both regional and global levels, Chinese scholars regard the contest as far less dangerous than the one that characterized the Cold War rivalry between the United States and the Soviet Union.

In addition to the challenges posed by the United States and its allies, official documents highlight a variety of nontraditional threats. The 19th Party Congress report, for example, warned of “unconventional security threats like terrorism, cyber-insecurity, major infectious diseases, and climate change.” Terrorist activities, China’s Military Strategy White Paper noted, have become “increasingly worrisome.” It also defined “hotspot issues” as “ethnic, religious, border and territorial disputes,” which it termed “complex and volatile.” The Military Strategy White Paper and statements by Chinese leaders typically call for international cooperation to address transnational threats; indeed, Chinese military forces have participated in various multinational efforts to promote peace and control nonstate threats.

Summary
China poses a comprehensive competitive challenge to the United States, across multiple issue areas and in multiple ways. Beijing aims at significant reforms to the operation of the postwar international order, the eventual abandonment of U.S. regional alliances, military predominance throughout much of East Asia, and leadership of Asian political and economic institutions, among other goals. In service of these objectives it is undertaking an extensive military buildup and employs predatory economic policies, political warfare, intense and zero-sum economic statecraft, and other tools. These policies unavoidably threaten the position of the United States and many of its interests. Symptomatic of the intensifying competition, both sides have stepped up escalatory rhetoric and punitive policies aimed at each other. Bilateral relations have reached a point of acrimony not seen since the Cold War.

However, at least three factors have served as important brakes on the intensity of the U.S.-China competition to date, making China more properly viewed as a selective rather than unconstrained revisionist power. One is the ambiguity of some of China’s goals, such as the exact degree of control it is seeking of claimed maritime territory. This ambiguity has allowed Beijing to interpret its ambitions in ways that did not demand an irresolvable confrontation. A second brake has been China’s patience—its willingness to measure progress toward its objectives in decades and centuries rather than months or years, which has reduced the perceived need for short-term belligerence. A third brake on the competition has been Beijing’s risk perception and its general unwillingness to risk a military confrontation with the United States or, more broadly, actions so aggressive that they might alienate the entire Asia-Pacific region.

As recent developments have shown, all three two constraints may be weakening under the influence of Beijing’s burgeoning confidence and resulting willingness to define its goals...
more precisely, and to pursue them more urgently, than before. The degree of intensity China will pose in the emerging competition cannot be reliably forecasted. There is no question that Beijing will be seeking regional predominance and significantly expanded global influence at the expense of the United States. It is selectively revisionist in terms of some aspects of the existing order. China’s continued arms buildup and escalating tensions between China and the United States over U.S.-Taiwan relations, Chinese coercion in the South China Sea, and other issues raise the alarming prospect that Beijing may at some point adopt a more confrontational approach to U.S. military forces operating near China. At this point, the United States must prepare for a more antagonistic, albeit primarily political and economic, competition than has been the case in recent years. Skirmishing in the domains of cyber space and influence operations appears poised to persist for the foreseeable future, and the risk of military conflict, although still low, could grow if the United States and China fail to reverse the trend of escalating tensions.

Russia

Russia’s view of the emerging strategic competition is multifaceted. At a macro level, Russia is dissatisfied with the current situation in the international system and seeks to change it. In certain cases, however, Moscow behaves like what might be termed a status quo ante power, seeking to restore an earlier status quo. Such behavior could be seen as revisionism, depending on one’s perspective. In other cases, Russia is an arch status quo power, seeking to uphold existing elements of the order. The overall picture that emerges is one of selective revisionism or alternatively selective status quoism; given that Russia sees itself as often responding to perceived Western revisionism rather than pursuing its own revisionist agenda, applying the label revisionist without adjectives obscures more than it illuminates in this case.

Misperceptions abound when it comes to Russia’s views of strategic competition. Russia does not seek a generalized confrontation with the United States or, more broadly, the West. Actions seen here as unprovoked aggression are thought of in Moscow as reactions to a revisionist West that systematically has refused to acknowledge Russia’s interests.

The Russian elite, for example, has a relatively coherent view about the nature of the current international system: The group sees the system undergoing a transition toward what it calls a “polycentric” world, with multiple centers of power driving the agenda, and anticipates such a world as better for Russia. Russia’s grand strategy can be thought of as accelerating the transition to a polycentric order. This view of the future also belies another commonly held Western perception: Moscow does not see itself as a declining power. (Objectively, there is significant truth to that: Most quantitative measures of national power do not register a decline.

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51 The “polycentric” formulation can be found in the country’s official foreign policy concept and the National Security Strategy, among others (see President of Russia, “Kontseptsiya vneshnei politiki Rossiiskoi Federatsii [Foreign Policy Concept of the Russian Federation],” 2016a; President of Russia, “O Strategii natsional’noi bezopasnosti Rossiiskoi Federatsii [On the National Security Strategy of the Russian Federation],” 2015). It is repeated in senior officials’ speeches and articles in nearly all descriptions of the international system.
for Russia since the turn of the millennium.) Although cognizant of the country’s major challenges, the Russian elite believes that the future is bright.

Most fundamentally, Moscow believes that it is a great power and entitled to act as such. That means it gets a say on any major international issue that affects its interests, and that it has the right to demand (1) respect for its influence (if not predominance) over its neighbors, (2) noninterference in its internal affairs, and (3) involvement in all key global processes. Being a great power also means that, in extreme circumstances, it is entitled to break international rules. However, in terms of rules that Moscow considers legitimate, particularly the UN Charter, it does not seek to overturn the order itself.

Russia has never accepted some elements of what is regarded by some in Washington as the international order. First, it does not assent to the idea that the order is U.S.-led; the United States is “probably the only superpower,” as Russian president Vladimir Putin has said, but it cannot lead the great powers or shape the order unilaterally. U.S. unilateralism and efforts to impose its vision of the world on the international system, many Russians believe, are the source of the system’s dysfunction. As Putin has said, “Unilateral dictates and forcing one’s own political framework [on to other states] produces exactly the opposite [of the intended result]: instead of conflict settlement, escalation; instead of sovereign, stable states, a growing expanse of chaos.”

Relatedly, Moscow has rejected the concept of a rules-based order on the grounds that it is code for a U.S. unilateral attempt to rewrite international norms to serve its interests. As Foreign Minister Sergei Lavrov has said, “Today, the U.S. and their allies have embarked on the path of re-writing the generally accepted norms of international law and replacing them with their own rules-based order, that is, an order based on rules which they themselves invent for their own purposes but change every now and then, so [the rules] suit their own political ends.” Lavrov and other senior Russian diplomats have become somewhat fixated on the phrase “rules-based international order” and denounce it at every opportunity.

Second, Russia has never acquiesced to a Western-dominated order in the former Soviet region (i.e., the 11 other former republics excluding the Baltic states). Moscow was prepared

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53 For example, the Russian security strategy states: “A solid basis has been created at this time for further increasing the Russian Federation’s economic, political, military, and spiritual potential and for enhancing its role in shaping a polycentric world” (see President of Russia, 2015).

54 For example, at the 2015 UN General Assembly, Putin said, “We consider the attempts to undermine the legitimacy of the United Nations as extremely dangerous. They could lead to a collapse of the entire architecture of international organizations, and then indeed there would be no other rules left but the rule of force” (see Washington Post Staff, “Read Putin’s U.N. General Assembly Speech,” *Washington Post*, September 28, 2015).


58 As early as 1995, Russia’s official policy toward the region stated that it would not accept Western alliances in the region. A presidential decree from that year states that Moscow will “obtain from the [region’s] states performance of their obligations to desist from alliances and blocs directed against any of these states” (see President of Russia, “Strategicheskii kurs Rossii s gosudarstvami – uchastniki Sodruzhestva Nezavisimykh Gosudarstv,” September 14, 1995).
to begrudgingly accept the current membership of NATO and the European Union (EU); it would never countenance accession or even deep integration of its closer neighbors in Eastern Europe (Belarus, Moldova, Ukraine) and the South Caucasus (Georgia, Armenia, Azerbaijan).59 (The five former Soviet Central Asian republics were never considered candidates for Western integration, but Russia has sought to minimize U.S. military presence there.) Relatedly, Russia did not accept that its smaller neighbors were entitled to full exercise of sovereignty: There has always been a yawning gap between Moscow’s emphasis on universalist sovereignty and non-interference principles at the global level and its practice, from the beginning of the post-Soviet period, of meddling in its neighbors’ affairs, including militarily.60

Third and finally, Moscow has never seen the international order as liberal or democratic. Democracy promotion and judging states by their democratic credentials are consistently opposed by Russia (with a partial exception during the early 1990s).

These factors have been relatively constant since 1991. However, something rather fundamental has changed about Russia’s character in this drama in recent years, or more specifically since 2014. Before 2014, Russia did little if anything to merit the revisionist label. Even the 2008 war with Georgia did not change the de facto situation on the ground; Russia had effective control over the separatist regions Abkhazia and South Ossetia since the ethnic conflicts of the early 1990s. (Although it did formally recognize them as independent states only after the war.) However, the period following the 2014 Maidan Revolution in Ukraine marked a watershed in terms of Russia’s risk tolerance in international politics, particularly vis-à-vis the West.

Russian officials viewed Maidan as a Western body blow directed against Russia’s international standing, and maybe even the start of an operation to undermine the regime.61 Russia adopted a far more confrontational posture toward the West as a result. The annexation of Crimea, stoking of violence in the Donbas region, the intervention in Syria, and the interference in the 2016 U.S. presidential election—all are a product of this paradigm shift. (As the Special Prosecutor’s indictment of the so-called troll factory demonstrates, the operation to use social media to interfere in U.S. politics began in mid-2014, i.e., soon after Maidan.)62

The role of the Ukraine crisis in shaping Russia’s international behavior underscores the reactive quality of that behavior. Moscow might have long-term objectives, but it generally undertakes specific initiatives in response to events. The extreme reaction to Maidan also makes clear that recent aggressive Russian behavior has not been the norm for post-Soviet Russia. When analyzing Russia as a strategic competitor, it should not be forgotten that there was a nearly 25-year period of qualitatively different Russia-West relations and overall Russian foreign policy. Although it is true that Russia was too weak in the 1990s to challenge the West, relative power alone cannot explain the change in Russian international behavior that began in

59 Recently declassified conversations between then-Presidents Boris Yeltsin of Russia and Bill Clinton of the United States include an episode in which the former asked for a guarantee that NATO enlargement would not extend to the former Soviet republics (see National Security Council and National Security Council Records Management System, “Declassified Documents Concerning Russian President Boris Yeltsin: Memorandum of Conversation [Morning Meeting with Russian President Yeltsin, NATO-Russia, START, ABM/TMD in Helsinki, Finland],” Clinton Digital Library, March 21, 1997).


2014. After all, this fundamental break came less than three years after what might have been the high point in U.S.-Russia cooperation during the so-called reset of relations. Furthermore, even at the post-Soviet nadir of its power, Russia was still the dominant military power in its immediate environs and could have, for example, taken Crimea.

The evidence is mixed on the question of whether Russia’s more assertive post-2014 behavior indicates a shift to an across-the-board revisionism. On the one hand, the annexation of Crimea was a truly a blatant breach of a fundamental international norm. The gravity of that action and others—such as the 2018 alleged poisoning of Sergei Skripal, a former Russian spy in the United Kingdom (UK), or using a chemical weapon—indicates a willingness to ignore the rules and a shift to a more anarchic approach to international politics.

On the other hand, Moscow has been careful to portray each episode of rule-breaking as its opposite: norm-compliance. Crimea, Moscow claims, was not annexed: Its people freely chose to become part of Russia in an act of self-determination fully consistent with the UN Charter. Although such twisted justifications are perhaps to be expected, it would be far worse for the order if Russia admitted that it is prepared to violate the rules as a matter of policy. Moreover, Russia has not used these episodes to propose anything resembling an alternative to the existing international legal order. Moscow invokes international legal principles grounded in the UN Charter constantly in its official discourse about its own behavior and that of other states. Moscow, as a principal architect and veto-wielding member of the UN Security Council, is deeply invested in the multilateral system centered on the UN. Where it has sought to modify norms (e.g., on cyber issues), it has done so via UN mechanisms.

Russian elites do not see their country as a revisionist power. In many cases, they seem driven by loss prevention, or what might be described as status quo anteism. Consistent with prospect theory, Moscow seems more willing to accept risk when acting to prevent loss rather than to make gains. This is particularly true concerning the use of force. Its military interventions were driven by loss prevention in one way or another: Russia has sought to keep Ukraine in its orbit. It has prevented regime change in Syria. It has sought to preserve a favorable military balance in the Baltic region. In 2008, it blocked Georgian President Mikhail Saakashvili from retaking the breakaway province of South Ossetia. Generally speaking, Russia has not deployed its military to create new geopolitical gains. Gains, where they have accrued, were not the original driver of the use of force. For example, in the case of the Syria operation, where Russia has achieved such gains, the initial driver of the intervention was to prevent losses by restoring the status quo ante (specifically, returning the country to the Assad regime’s control).

Although nominally sticking to a legalistic approach to international order issues, Moscow has consistently recognized the role of power in shaping the application of rules. This pattern is most evident in Russia’s attitude toward its neighbors, whose sovereignty the Kremlin sees.

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65 Samuel Charap, “Russia’s Use of Military Force as a Foreign Policy Tool: Is There a Logic?” PONARS Eurasia, Policy Memo No. 443, October 2016.
as highly contingent on their relative weakness vis-à-vis Russia. But Moscow’s deference to power in shaping the interpretation of norms is visible elsewhere as well. For example, Russia’s position on the South China Sea dispute has essentially been to push for a diplomatic solution rather than a legal one, deferring to China’s position on the UN Convention on the Law of the Sea tribunal rulings. At the same time, Russia has maintained a robust military-technical relationship with Vietnam, China’s rival in the South China Sea, and even sought to exploit Vietnam’s offshore energy reserves in areas of the Sea disputed by China. One can infer that Moscow believes international bodies should not be imposing rulings on great powers like China—but, by the same token, China has to respect the interests of other great powers that might not overlap with its own.

Russia consistently emphasizes the role of international negotiation and bargaining in resolving disputes. An example is Russia’s regional diplomacy surrounding the Syrian civil war, in which Moscow has sought to reconcile such disparate actors as Israel, Iran, Saudi Arabia, Turkey, Qatar, Jordan, and the United Arab Emirates. Russia is willing to negotiate so long as there is some give-and-take. However, as Syria also demonstrates, Moscow does not see coercive actions on the battlefield as inconsistent with a negotiated outcome. This emphasis on coercive diplomacy is central to understanding Russia’s broader approach to the West. From Moscow’s perspective, the West, and particularly the United States, has consistently ignored Russia’s interests throughout the post-Soviet period. Russia’s assertive behavior in recent years can be understood as a tactic of coercing the United States to negotiate. For example, almost immediately after the 2016 election, and Russia’s interference in it, Moscow proposed a bilateral U.S.-Russia noninterference pact, the equivalent of advancing on the battlefield and then suing for peace. Ultimately, Russia seemed willing to trade an end to its interference for an end to perceived U.S. efforts. The point is that Russia wants a negotiation with the United States on all of its central concerns, and it expects give and take. Until it gets such a negotiation, there will be a continued willingness to coerce Washington to the table.

Coercing the United States to negotiate is one piece of a broader Russian effort at reaffirming its great-power status. Russia often engages in such status-reaffirming or status-seeking behavior. Being treated as an equal by the United States is the main aspiration in this context, but it also applies more broadly. For a status-seeker like Russia, being ignored is the worst possible scenario. The Trump administration’s National Security Strategy and National Defense Strategy thus partially scratched this itch by acknowledging Russia as a competitor, and thus essentially a peer. However, to be acknowledged as a competitor is only the first element of

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66 Foreign Minister Lavrov has said, “Our position is determined by the wish, natural for any normal country, to see disputes resolved directly between the countries involved in a peaceful political and diplomatic manner, without any interference from third parties or any attempts to internationalize these disputes” (see Ministry of Foreign Affairs of the Russian Federation, “Foreign Minister Sergey Lavrov’s Remarks and Answers to Questions at the Meeting in Mongolia’s Foreign Ministry, Ulan-Bator,” April 14, 2016). After the ruling of the UN Convention on the Law of the Sea Tribunal, Putin essentially said that the decision was illegitimate because China did not take part in the proceedings: He declared the “interference of third parties, particularly extra-regional powers, harmful and counterproductive” and added that Russia stands “in solidarity and support of China’s position on the issue of non-recognition of the court’s decision” (see President of Russia, “Answers to Journalists’ Questions: Vladimir Putin Answered Russian Journalists Questions Following His Working Visit to China to Take Part in the G20 Summit,” webpage, September 5, 2016b).


Russia’s objective; it also wants the United States to treat it as an equal and come to the table prepared to bargain. This element remains elusive.

**Goals, Principles, and Grand Strategy**

Russian official documents and statements from senior officials contain a remarkably consistent vision of how the international system should evolve. We are in the process of transition, according to these documents, to fuzzy, but it has several basic contours:

- The great powers will be the leaders of their respective regions, particularly economically.
- The great powers will have clearly delineated red lines regarding vital interests, and those are respected by the others.
- Great powers will have a laissez faire attitude toward the form of governance, both of other great powers and of other states. Great powers will not interfere in each other’s domestic affairs, but they implicitly will have sway over their neighbors.
- Great powers will negotiate solutions to major problems collectively, and they will avoid unilateral actions on matters of general concern.
- The international system will be characterized by “fair” competition among the major powers. No power will abuse its position for unfair gain.
- Russia will be more secure and prosperous in this future world.69

This polycentric world order will produce greater stability and more-effective international action to address global problems. Notably, this concept does not imply a Russia-dominated world. Moscow does not have ambitions to shape the world in its image, as the Soviet Union did, or even be the leader in any region other than its own immediate neighborhood. It is also not a world in which the West and its institutions do not exist; they are merely cut down to the size appropriate to their relative power, as Moscow sees it.

Russia’s grand strategy can be understood as accelerating the transition to this preferable future, a transition that Russian officials believe is ongoing already. This transition is being actively stymied by the West (specifically, the United States). The United States, according to Russia, cannot accept the waning of its relative power and is fighting desperately to hang on to the remnants of the unipolar moment. This U.S. unwillingness to accept its diminished status is the source of much of the instability in the world today, according to Russian officials. As Lavrov puts it, “There are active attempts to hinder the process [of transition to polycentricity] primarily on the part of those who used to dominate the world, who wish to preserve their domination in new conditions as well, and, generally speaking, to enshrine their domination forever.”70

Viewed in this light, Russia does seem to be a revisionist. It is dissatisfied with the status quo and seeks to effect a change. From Moscow’s perspective, the change it seeks is mostly about modifying the system to reflect ongoing power shifts and thus to function more effectively. However, for the United States, that would mean ceding the near-exclusive leadership role it has enjoyed after the end of the Cold War.

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69 President of Russia, 2015; President of Russia, 2016a.

An important aspect of Russia’s strategy is that, apart from very selective and targeted employment of direct military force, it is anxious to pursue these objectives without risking major war. Its core techniques for achieving its goals involve asymmetric tools well below the threshold of outright conflict, ranging from disinformation to political warfare to global diplomacy to negotiations to economic coercion. Recent Russian national security statements have made clear this prioritization. Even in the case of Ukraine in 2014, Moscow engaged in economic coercion, offered massive economic incentives, and negotiated with the West before finally resorting to the use of force in the six months before the annexation of Crimea.

**View of Other Challengers**

Russia seems comfortable with the idea of an era of great-power competition. It seems to accept and even welcome competition as the paradigm for contemporary great-power relations. But it has a particular understanding of what competition means. First, competition should not be existential and all-encompassing like it was in the Cold War. Russian elites see no basis for systemic confrontation with other great powers, including the United States. Second, and relatively, competition in certain arenas should not prevent great powers from cooperating in others. Third, the competition should be “fair”: States should not abuse their positions to achieve unjust gain. (Examples of unfair competition are the U.S. use of economic sanctions and U.S. efforts to block pipelines between Russia and the EU. In both cases, Russia tends to see U.S. motives as largely commercial—gaining advantages for U.S. companies.) Universal rules are important in this context, so long as those rules themselves are fair.

The improved Russia-China relationship represents Moscow’s most significant foreign policy achievement of the post-Soviet era. Although this relationship, officially a “comprehensive strategic partnership,” has far more elements of cooperation than competition, from Moscow’s perspective it is somewhat of a model of what great-power relations should be, particularly in terms of managing competition. China has made a point of getting Russian buy-in for the Belt and Road Initiative in Central Asia, even while taking some decisions, such as prioritizing a route to Europe that goes around Russia, that Moscow might not like. China deepened its economic relationship, including extensive military industrial cooperation, with Ukraine after 2014, and Russia has deepened its ties with Vietnam, including sales of Kilo-class submarines. Neither refuses to cease “doing business” with third parties (for Russia, Vietnam; for China, Ukraine) to please the other. Instead, they respect each other’s foreign-policy independence, accept the reality that they will be competitors on certain issues, but do not allow these divergences to threaten their partnership.

**Relations with the United States**

Such a mutually respectful stance is the kind of relationship Russia seeks with the United States. Russia does not seek to perpetuate the current level of hostility in bilateral relations.

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72 In reference to U.S. pressure on European allies to stop the Nord Stream 2 pipeline, Lavrov has said that Americans “are not yet good enough at fair competition, they are shifting to unfair competition, to political pressure” (see “Lavrov Names Conditions for Extending Turkish Stream Project to Europe,” *TASS Russian News Agency*, January 15, 2018).

as an end in itself, although it is prepared to confront the United States when it perceives the need to do so. As of this writing, Russia certainly perceives such a need because it believes that Washington seeks to undermine and, if possible, overthrow the Russian government. Under those circumstances, Russia is willing to push back quite forcefully.

But Moscow would prefer to have a transactional relationship with Washington to better manage the competition, establish clear red lines, and more effectively cooperate on matters of mutual interest. Much of Russia’s behavior toward the United States can be understood as efforts to coerce and cajole Washington to behave like a “normal” great power: stop acting as though the unipolar moment has not ended; cease perceived efforts to undermine Putin’s regime; treat Russia like an equal; and negotiate with Moscow on key issues. What has changed in recent years is that Russia seems prepared to try to influence U.S. politics to push the United States in this direction.

**Summary**

In sum, Russia is pursuing its interests more assertively than ever before in the post-Soviet period. But it is critical to understand that Moscow perceives itself to be responding to U.S. and Western moves that threaten its existential security, particularly in Ukraine. This does not reduce the threat posed by some of Russia’s actions, but it shapes how Russia will respond to new U.S. and allied policies.

The United States believes that Russia is newly emboldened and confident; Russian officials see themselves as merely taking their rightful place in world politics—but also recognize that an all-out confrontation with the United States is not desirable or sustainable. Washington fears a concerted Russian effort to undermine the international order; Moscow believes it is resisting U.S. attempts to institutionalize unipolarity. The West perceives an entrenched authoritarian state, seeking to export its system; Russian leaders deal with any country, no matter its domestic politics. Russia accepts that an era of strategic competition is dawning but wants great-power understandings to mitigate instability; it sees a United States unwilling to grant it even a negotiation.

**Iran**

Iran constitutes a very different sort of competitive challenge from China and Russia. It is much smaller and weaker, without a military capable of large-scale aggressive action. It has a limited suite of tools of statecraft to employ. At the same time, its foreign policy is more distinctly ideological than either of the other two competitors surveyed here—although pure Islamist ideology has left its place to more realpolitik as the revolutionary republic has evolved.

Although the Iranian regime often frames its actions in ideological terms and frequently finds itself conflicted on which foreign policy course to pursue, Iran is at its core a strategic, pragmatic, and opportunistic actor—but historical experiences, national identity, and revolutionary ideology feed the goals of this opportunism, and they frequently run counter to U.S. interests. Iran’s strategic objectives are to ensure national unity and territorial integrity, maximize the nation’s power and security, ensure the survival of the regime, preserve its status as an Islamic Republic, establish its position as a regional hegemon, further its regional and international influence, and undermine and minimize U.S. and foreign influence over politics and key theaters in the Middle East and South Asia, and the Caspian. Iran views the United States
as its chief existential threat and Israel, Saudi Arabia, and the United Arab Emirates as lesser threats, while it enjoys selective cooperation with China and Russia (which it views as partners in the strategic competition against the United States). Given its inferior conventional military strength compared with the United States and some of its regional peers, Iran primarily relies on unconventional, asymmetric means of achieving its objectives, such as building an arsenal of ballistic missiles and supporting proxy militant groups (i.e., third parties, typically nonstate actors, that share some of the goals of the state and can be used as tools to enhance its influence and further its aims).

Iran’s actions sometimes appear erratic and contradictory, for at least two major reasons. Iran’s leadership is factionalized rather than cohesive, with the various power centers and factions holding and expressing differing views on matters of foreign policy and security. At the same time, the Iranian regime often spins its actions as being ideologically motivated—whether for domestic political gain or religious or nationalist purposes—when in reality Iran’s actions are primarily pragmatic and designed to advance its strategic interests.

The structure of Iran’s political apparatus further complicates its strategic decisionmaking. The government of Iran has some elements of a separation of powers model, with power distributed among an executive, legislative, and judiciary branch. In practice, however, the Supreme Leader of Iran serves as Iran’s highest ranking official, trumping the executive in almost every sphere of government and society, including serving as commander-in-chief of the armed forces. He also maintains control over the legislative and judiciary branches, through direct or indirect appointment of officials. Although it boasts elements of a democracy, Iran is a unique combination of theocratic and oligarchic states; given the factionalized nature of the Iranian government and the competing strategic, nationalist, and religious interests Iran must balance, Iran’s foreign policy reflects a constant and sometimes wildly oscillating balance of adventurism and pragmatism.

Immediately after the Islamic Revolution, Iran viewed itself as a revolutionary leader of other Islamic nations. Many within the current regime still believe that, as a state that considers itself the true Islamic Republic, Iran should seek to propagate revolutionary Islamic ideals to other states in the region. Over time, however, Iran has grown more moderate and pragmatic in its policies to a degree that its main goal is no longer to export the Islamic revolution to other countries. As one scholar notes, “Khomeini could theorize about an ideal Islamic state; once in power, he (and even more so his disciples) realized that they had to make compromises as a pragmatic response to the exigencies of the situation.”

Instead, Iran currently seeks to expand its influence within the region and on the world stage and to exploit weaknesses in other states to increase its influence. When Iran seeks to undermine regimes by fomenting internal unrest, it is often because it has extreme policy dis-

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agreements with that regime and wants to undercut it. As one RAND study explains about Iran’s strategic posture, “ideology and bravado frequently mask a preference for opportunism and realpolitik—the qualities that define ‘normal’ state behavior.”\footnote{Wehrey, Thaler, et al., 2009, p. xiv.} Furthermore, the study finds that despite Iran’s religious and revolutionary rhetoric, “the record of Iranian actions suggests that these views should be more accurately regarded as the \textit{vocabulary} of Iranian foreign policy rather than its \textit{determinant}.\footnote{Wehrey, Thaler, et al., 2009, p. xiv.}

Put simply, the Iranian regime speaks in a way that makes it seem like an irrational, radical actor but acts in a way that most rational, self-interested states do. Despite its sometimes overheated rhetoric and occasionally provocative actions, Iran is most properly viewed as at most a qualified or selective revisionist. It seeks to expand its power and influence within the existing system instead of creating a new revolutionary world order of its own—although, as noted next, it is aggressively pursuing its ideological ambitions within the region.\footnote{Wehrey, Thaler, et al., 2009, p. xvi.}

\section*{Goals, Principles, and Grand Strategy}

Iran seeks to maximize its power and security. Its more discrete strategic objectives include ensuring the survival of the regime, preserving its status as the Islamic Republic, establishing its position as the regional hegemon, furthering its regional and international influence, and eradicating foreign influence—particularly that of the United States—over politics in the Middle East. Ideally, Iran would like to oust any pro-U.S. or pro-Western regimes in the region and replace them with pro-Iranian regimes to deny the United States regional basing and other strategic opportunities, though it recognizes that this is in most cases not a feasible short-term goal. Iran remains vocally opposed to U.S. presence in the region, but in practice has displayed an unwillingness in recent years to use direct force to accomplish its objective of expelling the United States from the Middle East. In some places, Iran has either indirectly coordinated its efforts with the United States or found itself on the same side, and Iran has even gone so far as directly cooperate with the United States on a case by case basis. For example, in Afghanistan in the aftermath of the September 2001 attacks and the resulting NATO campaign in Afghanistan, the United States and Iran cooperated to oust the Taliban and to establish the new Afghan government.\footnote{James Dobbins, “The Iran Primer: Engaging Iran,” United States Institute of Peace, last updated August 2015.} In Iraq, the two parties indirectly worked in tandem to push back the Islamic State in Iraq and Syria (ISIS).\footnote{David Zucchino and Eric Schmitt, “Struggle over Kirkuk Puts the U.S. and Iran on the Same Side,” \textit{New York Times}, October 18, 2017.} Bilateral tensions have been high, however, since the U.S. withdrawal from the Iranian nuclear deal, the Joint Comprehensive Plan of Action, and reached a climax with the U.S. strike against Islamic Revolutionary Guard Corps Qods Force Commander Qasim Soleimani in January 2020.\footnote{Michael Crowley, Falih Hassan, and Eric Schmitt, “U.S. Strike in Iraq Kills Qassim Suleimani, Commander of Iranian Forces,” \textit{New York Times}, January 2, 2020.}

Though Iran wishes to be the regional hegemon at the helm of a collection of Islamic republics, Iran does not actively seek to expand its territory or to forcefully impose its revolutionary ideology onto other states in the region. It has, however, demonstrated a willingness to
seize any opportunities to expand its influence and spread its own brand of Shi’ism, as it would ideally prefer to see clerical rule implemented in other Middle Eastern states. In Iraq, for instance, Iran has sought access to and influence over holy sites in Najaf and Karbala, and has tried to impress its unique form of Shi’ism on Iraqi clerics by bringing them to train in Qom, one of Iran’s holy cities that houses its premier religious academies. Leveraging its position as the largest Shia-dominated nation in the Middle East, Iran has also sought opportunities to expand its influence by offering rhetorical and material support to marginalized Shia populations in its neighboring countries.

Iran views the presence of the U.S. military throughout the Middle East and its partnerships with the Gulf Cooperation Council states as existential, persistent threats. Indeed, as is the case with China and particularly Russia, Iran sees the United States as the world’s dominant revisionist power, one determined to overthrow existing governments in such places as Tehran. By some accounts, “many officials in Tehran see the United States as an anti-status quo, revolutionary power seeking to reshape the Middle East by exporting secularism, democracy, and, more recently, sectarianism.”

As a result, the Iranian government displays a degree of paranoia about U.S. intentions and is extraordinarily sensitive to U.S. actions in the region. It views the presence of U.S. airpower in neighboring states as a particularly dire threat, fearing these assets will be used for “encirclement and strangulation” of Iran. The regime also tends to falsely attribute any domestic instability that does occur to meddling by foreign powers, particularly the United States. Recognizing that the regime’s perception that the United States seeks to foment a soft revolution is real, the regime also plays up external threats as a diversionary tactic to buffer public criticism for regime corruption and mismanagement. For example, Iran was badly hit by the COVID-19 epidemic, and the outbreak’s impact was exacerbated by the government’s poor public health response, censorship, premature opening of the economy, and the continuing effects of U.S. sanctions. Publicly, the Supreme Leader suggested initial reports of the virus spreading were U.S. propaganda to deter voting in Iran’s parliamentary election and promoted conspiracy theories that the United States had engineered the virus.

Within the Middle East, Iran views Saudi Arabia as its biggest threat because of the Sunni-Shia tensions that extend back centuries, the two states’ competing objectives and close proximity, Riyadh’s relatively large and well-equipped military, and Saudi Arabia’s history of cooperation with the United States. Moreover, Iranian officials frequently point to the youth

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85 International Crisis Group, Iran’s Priorities in a Turbulent Middle East, Middle East Report No. 184, April 13, 2018.
87 Wehrey, Thaler, et al., 2009, p. xiii.
and inexperience of the Kingdom’s leadership (particularly Crown Prince Mohammed bin Salman, and what they perceive as his volatility, risk-tolerance, and adventurism) as a threat to regional stability. As Supreme Leader Ali Khamenei put it in 2015,

> We have had many differences on a number of diverse political issues with Saudis. But we have always said that they the Saudis show a certain dignity and sobriety in their foreign policy. They have also lost this dignity and sobriety. A few inexperienced youths have taken the affairs of that country in their hand and they privilege a savage approach over one of modesty and pretense and this will end up being to their disadvantage.\(^{92}\)

Although both countries still frequently evoke the sectarian elements of the rivalry, the modern-day Iranian-Saudi clash primarily stems from concerns over national security and the pursuit of regional hegemony. Both countries seek to be the dominant power in the region, with Iran proclaiming itself the leader of the Shias and Saudi Arabia viewing itself as the leader of the Sunni states.\(^{93}\) Today, the Persian Gulf region is divided between the two sides, with some countries leaning sharply one way or the other and others, notably Oman, striving to hedge and balance between the two sides.

Throughout the Middle East, Iran and Saudi Arabia are engaged in a proxy war through various militant groups. For example, in Yemen, Saudi Arabia and Iran are backing opposite sides in the conflict.\(^{94}\) In Syria, Iran backs Syrian President Bashar al-Assad and Saudi Arabia supports the anti-government rebels.\(^{95}\) In Iraq, Iran capitalized on the turmoil following the U.S. invasion in 2003 and the power vacuum created by the U.S. withdrawal in 2011 to augment its influence by supporting an eclectic mix of proxy political and militant groups, effectively denying Saudi Arabia any sway.\(^{96}\) Iran has also gained a great deal of influence in Lebanon through its most powerful proxy, Hezbollah, which is fighting in Syria and also has a presence in Yemen and Iraq. In effect, Iran has surrounded its main rival with proxies in nearly all states bordering Saudi Arabia. This competition also extends to Afghanistan—where ethnic, linguistic, cultural, and historical ties have traditionally been a source of influence but also challenges for Iran, including a large Afghan refugee and immigrant population residing in the country—Iran and Saudi Arabia fund and support opposing groups, further fueling tensions across provinces where Kabul has little control. Islamic Revolutionary Guard Corps–linked media have identified Saudi, Emirati, and Qatari funding and support of Sunni extremist groups as a source of concern in western Afghanistan—which shares a porous border with Iran.\(^{97}\)

Although Iran may have ambitious goals, its strategies for accomplishing these objectives are constrained by its limited conventional military capacity, relative diplomatic isolation, past strategic missteps, and tensions between the Iranian regime and the public, some of whom

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\(^{93}\) Wehrey and Sadjadpour, 2014.


have come to reject Iran’s revolutionary ideals. Given these constraints, Iran relies heavily on unconventional, asymmetric means of pursuing its objectives. Its strategy focuses on several dominant lines of effort with such tools in the lead. As one source has summarized them, these are “deterrence and homeland defense, support for Islamist militant groups (both for symbolic reasons and as a retaliatory capability), and the currying of favor with publics in the Arab world to circumvent official hostility from other regimes in the region.”

Compared with direct regional competitors, Iran possesses significant military power, though it does not possess adequate conventional military strength to engage in sustained outright aggression with a modern military power. Since the Iran-Iraq War, Iran’s military has only experienced modest modernization, relying on largely outdated or inferior quality weapons, and having only a limited capacity to produce its own systems. The relative advantage Iran enjoys in the size of its land forces when compared with the numbers fielded by its neighboring states—roughly 350,000 in the regular army, 125,000 in the Islamic Revolutionary Guard Corps, and another several thousand in reserves and paramilitary forces—is diminished by the poor training and lack of modern equipment employed by most of its forces. Iran’s navy and air force are, with a few exceptions, largely composed of outdated equipment and machinery, and Iran’s attempts to modernize have been stymied by its economic stagnation under the recently lifted international sanctions regime. The military’s lackluster leadership—with its primacy on politics rather than proficiency—coupled with the redundancies within and competition between the army and the Islamic Revolutionary Guard Corps, exacerbate these issues.

These weaknesses help account for the fact that, although the Iranian land forces have enough manpower to defend the homeland, they are “not organized or trained for power projection or sustained combat outside Iran.” Iran seeks to avoid a direct military confrontation with the United States, recognizing it would likely lose such a fight. Iran also seeks to avoid a military clash with the Gulf Cooperation Council states, as the United States may then come to the aid of its regional allies. Instead Tehran favors a strategy of asymmetric and indirect actions, guerilla warfare, and political subversion. In service of this strategic approach, Iran has invested in unconventional, asymmetric military capabilities to offset its conventional weaknesses. It also sought to make up for conventional weakness by pursuing the rudiments of a nuclear deterrent, which it aims to use as a deterrent against attacks by foreign powers or attempted regime change, a bargaining chip, and as a threat to regional adversaries.

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102 Cordesman, 2010.
103 Wehrey, Thaler, et al., 2009, p. xvi.
104 Wehrey, Thaler, et al., 2009, p. xvi.
105 Robert Reardon, Containing Iran: Strategies for Addressing the Iranian Nuclear Age, Santa Monica, Calif.: RAND Corporation, MG-1180-TSF, 2012; Wehrey, Thaler, et al., 2009, p. xvi.
Iran also sees its ballistic missile program as its main strategic deterrent and defensive capability, and it has the largest (although not the most advanced) arsenal in the region. Iranian officials have claimed that the range of their missile is limited to 2,000 kilometers, which would allow them to hit U.S. targets in the region, Gulf monarchies, and Israel, although they have also asserted having the capability to extend this range. Iran’s use of drones and cruise missiles against Saudi oil facilities in September 2019 also demonstrated that it had made significant advancements in developing its cruise missile capabilities.

Another leading component of Iran’s essentially asymmetric and indirect approach is the sponsorship of proxy militant groups throughout the Middle East. The use of proxies is a low-cost option, in terms of both attribution and material support. Although, in some cases, Iranian sponsorship of a proxy is an open secret (as is the case with Hezbollah), using proxies rather than acting directly affords Iran a degree of plausible deniability when intervening in the affairs of other states. Iran’s use of proxies also contributes to its goal of reshaping the regional balance of power, as it gives Iran influence over the politics of other states and can undermine other regimes. The strategy supports its narrative of being a symbolic leader of the Islamic resistance against foreign powers and extends the depth of its defense into enemy territory rather than on Iran’s borders. Acting through proxies also allows Iran to leverage its strongest military asset, the Qods Force, which is a Special Forces unit within the Islamic Revolutionary Guard Corps that is specifically dedicated to training and providing military aid to nonstate militant groups with the aim of projecting Iranian military power. Importantly, by forging ties to various nonstate groups, Iran is able to secure influence in various regional countries should their central authorities collapse or fail to assert themselves effectively.

Finally, to complement these efforts, Iran seeks to influence the publics of its Arab neighbors to prevent their governments from attacking Iran. For example, Iran broadcasts news and entertainment in Arabic to Iraq through Al-Alam, a television network. Through such outlets in neighboring countries, Iran seeks to propagate its narrative, portraying itself as “a populist challenger of the status quo, a champion of the Palestinian cause, the patron of Hezbollah, and a beleaguered victim of Western double standards on the nuclear issue.” Despite such charm offensives, Arab support for Iran fluctuates rapidly and frequently, rendering the other elements of Iran’s strategy all the more important. Support for Iran on the Arab street is also largely dependent on Iran’s broader regional strategy and policies, including Islamic Revolutionary Guard Corps operations in the Middle East and Tehran’s support for sectarian figures and policies, including individuals and groups perpetrating atrocities, such as the Assad regime and the Shia militias in Iraq.

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110 Katzman, 2018, p. 4.
111 Ariane Tabatabai, “Why the Protests Won’t Change Iran’s Foreign Policy,” Foreign Affairs, January 5, 2018.
View of Other Competitors

As the United States’ two biggest rivals, China and Russia play important roles in shaping the U.S.-Iranian strategic competition. In discussions of U.S. competitors, Iran is often lumped in with the other two as potential spoilers of the international order that may actively coordinate their activities. In reality, Iran has complex relationships with both China and Russia, cooperating in some areas and competing in others.

Iran’s relationship with China is primarily economic in nature: China is Iran’s top trading partner, and China needs Iran for its geostrategic location and natural resources, particularly cheap oil. Following the Islamic Revolution, Iran found itself isolated and gradually turned to China. First, during the Iran-Iraq War, China supplied Iran with much-needed weapons and military equipment before helping the country’s reconstruction efforts in the following decade. Next, with international sanctions in place by 2012, China consolidated its position in the isolated oil-rich nation before tightening its grip on the Iranian economy even further following the slow pace of business that resulted from the nuclear deal. Chinese investments have financed several initiatives to improve Iranian transport infrastructure, which also serves Chinese interests because Iran’s geographic location makes it a critical link in China’s Belt and Road Initiative. According to Chinese official sources, the Belt and Road Initiative seeks to “connect Asian, European and African countries more closely and promote mutually beneficial cooperation to a new high and in new forms.”

However, Iran is actively seeking other economic partners because of what Iranian officials and the public view as the slow pace of progress in delivering projects and substandard quality of the goods. India has invested heavily in Iranian infrastructure in support of its International North South Transport Corridor initiative, which is similar in concept to the Belt and Road Initiative and would also seek to leverage Iran’s optimal geographic position to connect India to Central Asia, Russia, and Europe. Tehran also has sought improved economic ties with Europe and Japan. The U.S. drive to reinstate economic sanctions may have the result of driving Iran into greater economic dependence on China.

Iran and Russia have an equally transactional relationship based on geopolitical interests. Economically, Russia does not conduct as much trade with Iran as China does, and does not rely on Iranian natural resources. Nevertheless, Moscow established itself as Tehran’s top (and often sole) nuclear supplier in the decades following the collapse of the Shah.

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cally, however, Russia is more interested in the Middle East, and seeks to increase its influence in the region while countering that of the United State.\textsuperscript{120} Given its proximity to Iran, Russia has cooperated with Iran on such security issues as combating ISIS, and has historically supplied armaments to Iran.\textsuperscript{121} In Syria, Iran and Russia are both backing the Assad regime, and former Iranian Foreign Minister Mohammad Zarif, in a July 21, 2020, meeting with his counterpart in Moscow, declared bilateral relations as “currently the best in the last decade.”\textsuperscript{122} However, tensions between the two countries have emerged in Syria. These tensions stem from operational challenges, particularly the Russian use of an Iranian air base for refueling purposes, which the Russians publicized against Tehran’s wish—this sparked criticism in Iran, where the constitution bans the establishment of foreign bases.\textsuperscript{123} Russia’s relationship with Israel has also complicated matters as Moscow has sought to balance its relationship with both Iran and its chief adversary in the region, Israel.\textsuperscript{124} Although Iran does not expect Russia to cut off its ties to Israel, the extent and timing of Israeli intelligence sharing with Moscow in Syria have created tensions between Russia and Iran. For example, the Israelis notified the Russians that they were embarking on a bombing campaign in Syria in 2018.\textsuperscript{125}

Iran’s relationships with China and Russia are also influenced by Iran’s unique role in the energy market. Iran has the second-largest natural gas reserves in the world; assuming it attracts the capital (an estimated $140 billion in foreign direct investment) that it needs to fully develop its oil and gas industry, it will have the production capacity to pump gas to only two of three potential markets: China, India, or Europe.\textsuperscript{126} In this sense, Iran is a direct competitor of Russia, and Russia will seek to divert Iranian energy supplies to non-European markets to avoid losing leverage over key European countries like Germany.\textsuperscript{127} At the same time, Russia also sees Iran’s obsolete energy infrastructure and its untapped resources as an opportunity. For example, Russia and Iran have announced cooperation in refining and crude exploration and production.\textsuperscript{128} Finally, Iran has also cooperated with Turkey, Syria, and North Korea on various issues to advance its interests and appears willing to align itself with any actor that opposes the United States.\textsuperscript{129}


\textsuperscript{121} Kasting and Fite, 2012, p. 35.


\textsuperscript{123} Esfandiary and Tabatabai, 2018, pp. 142–144, 157.

\textsuperscript{124} Nikolay Kozhanov, “Russia’s Difficult Balancing Act Between Iran and Israel,” \textit{Al Jazeera}, February 1, 2020.

\textsuperscript{125} Anshel Pfeffer, “Putin Is Giving Israel a Free Hand Against Iran in Syria. But He May Soon Have to Pick a Side,” \textit{Haaretz}, May 11, 2018.

\textsuperscript{126} Kasting and Fite, 2012, p. 3.

\textsuperscript{127} Kasting and Fite, 2012, p. 5.


Summary of Challenger Dynamics

This brief review of the three primary challengers to U.S. interests and the norms and institutions of the U.S.-led postwar order holds several lessons for how the United States needs to conceptualize the overall competition.

- Given the relative power, global weight, and ambitions of the three states, the emerging era can best be conceived as a generalized strategic competition with China, combined with more regional- and issue-specific contestations with Russia and Iran. It is not clear that China’s ambitions can be resolved in the framework of a stable, rule-bound relationship.
- More broadly, relationships with the major challengers should be conceptualized as three distinct competitions, not an indivisible, overarching reality. Each of these states has different degrees of fear and ambition, risk calculus, and capabilities. They should be treated individually rather than lumped into a generic category of revisionist states.
- As much as these three states are unquestionably taking aggressive actions, all of them have powerful narratives of victimization and grievance and believe that they are the beleaguered party in the competition. Each views the United States as a persistent threat to the security of their regime and thinks of Washington as the world’s dominant revisionist power.
- The level of coordination among the three should not be exaggerated. This is not an “illiberal coalition” of states actively conspiring to undermine U.S. interests. They have overlapping interests but also some differing ones. China and Russia are coordinating in certain ways to counter U.S. influence but evidence about these contacts suggests that they represent some degree of broad alignment rather than a day-to-day, issue-by-issue collaboration. Most importantly, the degree of their collaboration is not foreordained: U.S. policy can draw them further apart or push them into a closer embrace.
- All of these states strongly prefer to pursue their ambitions below the threshold of major conflict. This is true, in part, because of a belief by all three that they cannot go toe-to-toe with the U.S. military but also for other reasons. All aspire to respected status in the world community; none is interested in becoming a militaristic outlier to world markets or geopolitical processes. The challenge they pose is likely to remain primarily below this threshold—although their grievances and ambitions mean that higher levels of violence, through accident, miscalculation, or unpredictable events, cannot be entirely ruled out.
CHAPTER THREE
The Shifting Perspectives of U.S. Allies

Even as the challenger states seek greater influence and pose dangers to U.S. interests and the U.S.–led international order, significant shifts are underway in the self-conception of many formal U.S. allies. Taking challenger states’ changing views into account is essential to understanding the overall competitive space.

United Kingdom

The UK has traditionally been the United States’ closest European ally and most reliable military partner. Its view of the international system parallels that of the U.S. National Security Strategy and National Defense Strategy most closely—however, even the UK diverges in important ways from the view of the international system laid out there. London views the emerging strategic competition with Russia with growing concern, especially in terms of Russian hostile social manipulation efforts. In the context of Brexit, however, the UK’s future relations with the EU are unsettled, and London’s views of Chinese ambitions have been more mixed, though they have been hardening. The UK remains firmly committed to the idea and practice of a Western-led liberal order and to playing a notable role in its preservation. Exactly how this works out over the coming decade remains highly uncertain, however. Dialogues in London made clear, as one official put it, that the UK is “just starting to figure out what an era of greater competition means.”

Goals, Principles, and Grand Strategy

The UK has published several strategy documents that reflect its thinking about interests, threats, and its role in the emerging strategic era. In 2010, London published a national security strategy and a strategic defense and security review. The strategy retained a strong emphasis on the risks of networked societies, fragile states, and extremism, stating that countering terrorism was the “top priority” of the strategy. The document did not focus on the risks.

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from revisionist powers or geopolitical competition. It was quite explicit: “We face no major state threat at present,” it concluded, “and no existential threat to our security, freedom or prosperity.”

The document argued for strong international engagement and views the UK as gaining leverage from its status as an economic, political, and cultural hub in a networked world. Dialogues in London largely supported the theme outlined in the national security documents, that the UK’s own role in the emerging era will be a coordinating, convening, and catalyzing one, serving as the hub of a global network of relationships benefiting from the UK’s status as a financial center, leader of the Commonwealth nations, and major player in international forums from the UN to the Group of Twenty (G20). The focus is “keeping the Euro-Atlantic community together,” one official suggested, and secondarily aiming at more global objectives, though part of the UK’s global legacy gives it the advantage of enjoying “deep, pivotal relations with powers not necessarily in our immediate neighborhood,” including South Korea, Japan, Saudi Arabia, and Turkey. The official described it as a “galvanizer” role.

Several people in London emphasized the UK’s various global initiatives to bring substance, including in the military sphere, to such a galvanizer role. London is pursuing intensified dialogues with Japan, one scholar notes, sending ships to participate in the Rim of the Pacific maritime exercises, and rotating Typhoon squadrons through Korea and Japan. There has been discussion of using the UK’s global diaspora more effectively in soft power ways, though what precise influence this would give is unclear.

In November 2015, the UK government issued a significantly revised and updated national security strategy and strategic defense and security review. In terms of the balance between state and nonstate threats, the Prime Minister’s cover letter said about the strategy that “At its heart is an understanding that we cannot choose between conventional defences against state-based threats and the need to counter threats that do not recognise national borders. Today we face both and we must respond to both.”

The 2015 UK strategy contained a strong statement of the significance of liberal values: “Our long-term security and prosperity also depend on a stable international system that reflects our core British values.” It continues: “We sit at the heart of the rules-based international order. The UK is the only nation to be a permanent member of the UN Security

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4 Prime Minister’s Office, 2010, pp. 9, 11, 14.
5 Prime Minister’s Office, 2010, pp. 4, 21.
7 Interview with British national security scholar, London, February 19, 2018.
9 Prime Minister’s Office, 2015, pp. 5–6.
10 Prime Minister’s Office, 2015, p. 10.
Council and in NATO, the EU, the Commonwealth, the Group of Seven (G7) and G20, the Organization for Security and Co-operation in Europe, the [Organisation for Economic Co-operation and Development], the World Trade Organization, the International Monetary Fund, and the World Bank.”

A year after the 2015 document, the UK government issued an annual report on the implementation of the original strategy. In the interim, the Brexit vote had occurred and the report recognized the uncertainties that had been introduced into the UK’s future role in the EU and related issues. In terms of competition the document did refer to the “resurgence of state-based threats” and the “intensifying wider state competition is currently demonstrated most clearly in the actions of Russia in Syria and Ukraine.” Broadly speaking, however, the general focus on extremism, terrorism, instability, and other nonstate threats continued to provide the primary emphasis of the document. The document spent more time on mass migration and human trafficking, for example, than on the risk of geopolitical competition.

On China, the document portrayed a dominant objective of closer relations. “We have taken our relationship with China to a new level,” it suggests, listing several initiatives. The updated strategy statement downplayed the security implications of Brexit, arguing that “the UK remains fully and strongly committed to Europe’s defence and security.” Many of these themes remained in evidence in speeches of senior UK leaders through mid-2018. Then, in 2021, the UK issued “Global Britain in a Competitive Age: Integrated Review of Security, Defence, Development and Foreign Policy,” which deepened the growing emphasis on competition, referring to China as a “systemic competitor.”

**View of Other Challengers**

More than earlier documents, the 2015 UK strategy portrays Russia as a rising threat to Europe and the wider international order and commits the UK to support for collective defense and counteracting Russia’s wider assaults on liberal values. In its treatment of “wider state competition,” however, the document is notably minimalist. The section on competition in the 2015 UK strategy begins with a reference to the activities of foreign intelligence services rather than


13 Prime Minister’s Office, 2016b, p. 3.

14 Prime Minister’s Office, 2016b, pp. 23, 7.

15 In a speech at the UN in September 2016, Prime Minister Theresa May spoke largely about terrorism, migration, and human slavery, with no mention of geopolitical competition at all (see Prime Minister’s Office, Theresa May’s Speech to the UN General Assembly,” London, September 20, 2016a). Then–Foreign Minister Boris Johnson spoke in February 2018 to assure EU partners that, whatever had happened with Brexit, the UK’s commitment to European defense remained “unconditional and immovable. . . . It makes sense for us to continue to be intimately involved in European foreign and security policy” (see Foreign and Commonwealth Office, “Uniting for a Great Brexit: Foreign Secretary’s Speech,” February 14, 2018). May emphasized that point in her speech to the Munich Security Conference that same month (see Prime Minister’s Office, “PM Speech at Munich Security Conference, 17 February 2018,” London, February 17, 2018. Army chief Sir Nicholas Carter gave a speech at the Royal United Services Institute on January 22, 2018, in which he was blunter about the Russian threat than civilian senior officials, and spoke specifically to the threat of Russian below-the-threshold adventurism (see Nicholas Carter, “Dynamic Security Threats and the British Army,” speech at the Royal United Services Institute, London, January 22, 2018).

a discussion of intensifying geopolitical competition across the board but only calls state competition a “risk to stability.” The section is silent on China or any broader sense of a fundamentally changing era in competitive dynamics, and is still largely favorable toward relations with China. The document goes so far as to describe “our ambition for the UK to be China’s leading partner in the West.” This emphasis changed somewhat in the 2021 Integrated Review, which was more explicit about the degree of challenge posed by China in particular.

Although the UK now perceives the Russian threat to Western democracies as significant and urgent, the threat it perceives is largely one focused on political subversion and disinformation. Few in London gave much credence to the idea of a large-scale Russian military attack on Article V nations.

Discussions with UK officials and experts in 2018 suggested that, already by that time, official thinking was running ahead of official documents: The UK now clearly perceives an increasingly competitive environment, especially about Russia. Repeatedly in the discussions, official sources made clear that perceptions of the threat and risk posed by Russia and China have now advanced further than the public documents would suggest. Prime Minister May’s public statements on Russia and her effort to rally Western punishments in the wake of Russia’s alleged poisoning of a former spy in London, better reflect current thinking in Whitehall than even the 2015 national security strategy, officials and experts suggested.

Suspicion of China’s actions still lags behind concerns about Russia, but it is also growing, and official attitudes about Chinese industrial espionage, influence seeking, and predatory trade practices are hardening somewhat. In security terms, London announced in February 2018 that it would be sending a frigate to transit disputed waters in the South China Sea to emphasize the norm of freedom of navigation, with some current and former officials making quite blunt statements about the message being sent to Beijing—although few in London believed that the UK could or would play a significant role if conflict occurred.

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17 The entirety of the remainder of the section on competition reads as follows: “More generally, wider state competition can be a risk to stability. In the Middle East and North Africa, regional powers have been pursuing competing security interests, driven by growing military and economic capabilities. Both South Asia and South East Asia continue to grow in economic importance and political significance, but this has come with increased tensions, exacerbated by unresolved historical disputes. North Korea is the only state to test a nuclear weapon in the 21st century, and its continued pursuit of nuclear weapons and ballistic missiles is a serious concern” (see Prime Minister’s Office, 2015, p. 19).

18 For a comparison, the document’s section on “energy security” is roughly as long as the section on strategic competition; overall, its emphasis on terrorism, extremism, and instability in fragile states is vastly more detailed than its discussion of global geopolitical competition; Lunn and Scarnell (2015, pp. 22–33) compare these themes with the 2015 U.S. National Security Strategy.

19 Prime Minister’s Office, 2015, pp. 58, 71. This striking fact is emphasized in Lunn and Scarnell, 2015, p. 7.


22 Interview with British official, London, February 19, 2018. “We are doomed to have a period of intense competition” with Russia, one scholar suggested in summarizing emerging official and unofficial thinking in London (interview with British national security scholar, London, February 19, 2018).


However, London remains reluctant to challenge China too directly, especially given the likely economic costs of Brexit.\textsuperscript{25} The “ways in which China threatens UK interests is not the same as with the United States,” one official noted. With Russia, the UK is “immediately embroiled” in Russian aggression, but this is not the case with China.\textsuperscript{26} The UK is “aware of” the rising Chinese challenge, one scholar explained, but not yet sure what to make of it or how to respond. The UK is “not ready to nominate China as an enemy.” There is a “deep rooted difference in the degree of threat perception” between the United States and the UK about the China challenge. In some cases, the UK sees the United States as a threat to the rules-based order, and this scholar argued that “on multiple issues, the UK is closer to China than the United States.”\textsuperscript{27} Another official suggested that the UK is “not as concerned about relative gains” with regard to China; China’s “geopolitical frontier” remains relatively far from the UK, and Beijing remains “horrible at soft power.”\textsuperscript{28} These considerations partly explain London’s decision to join China’s Asia Infrastructure Investment Bank despite U.S. concerns. China is playing to these mixed motives by reciprocating the interest: In February 2018, China’s President Xi hosted Prime Minister May and declared that China sought “a new level” of trade relations with the UK.\textsuperscript{29}

Yet the relationship subsequently deteriorated, with the UK banning the use of equipment from Chinese technology company Huawei in its 5G network in July 2020.\textsuperscript{30} China’s introduction of a new security law in Hong Kong in June 2020 represented another important source of tensions. The UK reacted to the measure with an offer to allow up to 3 million Hong Kong citizens to apply for UK citizenship; China responded with threats of retaliation.\textsuperscript{31}

Relations with the United States

The 2015 strategy document argues that “our special relationship with the US remains essential to our national security. It is founded on shared values, and our exceptionally close defence, diplomatic, security and intelligence cooperation.” But it also notes that “we are extending and expanding our defence and security relationships with our European partners, notably France through our commitments under the 2010 Lancaster House Treaty, and Germany. We have close relationships with all EU member states, and with allies worldwide, such as Japan.” The document also points to efforts to build security partnerships with key regional powers, such as South Korea, Indonesia, Malaysia and Singapore, and suggests that the UK is working to build “stronger relationships with growing powers, including China, India, Brazil, and Mexico.”\textsuperscript{32}

\textsuperscript{25} Interview with British political scientist, London, February 22, 2018.
\textsuperscript{26} Interview with British official, London, February 19, 2018.
\textsuperscript{27} Interview with British national security scholar, London, February 19, 2018.
\textsuperscript{28} Interview with British officials, London, February 22, 2018.
\textsuperscript{29} “Xi Wants a ‘New Level’ of China-Britain Trade Ties,” \textit{Straits Times}, February 2, 2018.
\textsuperscript{32} Prime Minister’s Office, 2015, p. 14.
Multiple officials and scholars also emphasized that, in the words of one, “the United States is so critical to the liberal international order.”33 The United States is stepping back from its position as architect and shepherd of the international order, and all in London agreed that this was the single greatest potential source of instability. Some worried that as a result, partners who had been more accommodating to U.S. interests in respect of its order-supporting role—like the EU—would become more confrontational in trade issues.

Summary
Despite the emphasis on “Global Britain,” there is more uncertainty than coherence in the UK’s self-conception as an actor on the world stage. One scholar suggested that “there is a massive vacuum where British foreign policy used to be.”34 “Global Britain” remains an ill-defined catch phrase, and the official documents that exist are by general agreement not strategies. “Strategy making is on auto-pilot” at the moment, according to another expert.35 One official suggested that in the UK but also among all the major contestants in the rising competition, “there is no theory of success on [any] side.”36

In the context of Brexit, the problem is broader. “We don’t really know what this country is at the moment,” the scholar, with decades of experience evaluating and commenting on UK foreign policy, argued. No singular, coherent vision guides UK foreign and defense policy. “There are very profound self-definition issues” being debated in the UK today.37 One strong and continuing theme does persist: The UK sees a multilateral order as the foundation for competitive responses. “As a small, very global country,” one official said, “we are absolutely dependent on the [rules-based] order.”38

Germany
Following reunification in 1990, Germany based its foreign policy predominantly on the success and stability of the liberal, rules-based order.39 German foreign policy elites and the wider public believed that the postwar institutions, such as the EU, UN, and World Trade Organization, would be universally accepted and able to mitigate international competition between increasingly democratic societies. Now, Berlin’s foreign policy elite contemplates whether and how to adjust to an unexpected international environment in which major players (such as Russia and, to some extent, also the United States) contest international norms, power returns as a factor in international relations, and illiberal tendencies enjoy a revival.

Berlin’s strategic focus is mainly directed at the further development of the EU as a capable international actor and alliance to hedge against the risk of a weakening transatlantic

partnership, which remains the bedrock of German security. Toward that end, the deepening of the partnership with France is indispensable—however, it is at times in conflict with Germany’s traditionally inclusive approach to regional politics that honors the interests of smaller and Central European members of the EU. A perception of rising competition is becoming more common: The emphasis on nonmilitary tools remains in Germany’s basic character, but it is fading in the face of increasing international competition.40

Germany has been described as a “trading power” or “geo-economic power” because of its reliance on the export industry.41 Germany is the third-largest exporter of goods (behind China and the United States) and nearly 30 percent of jobs are directly and indirectly linked to the export industry.42 Official German documents and German commentators highlight that economic interests are driving Germany’s push for multilateral cooperation.43 However, economic interests at times also undermine Germany’s ability to seek multilateral solutions.

Goals, Principles, and Grand Strategy

Germany’s character is mainly defined by its democratic regime type, its identity as a civilian power, and the role of constellations of domestic interests that constrain the governments’ room for maneuver.

Following World War II, the United States and its allies were instrumental in designing Germany as a democratic and federal regime, with a focus on avoiding the possibility of future German aggression. The writers of the German Basic Law highlighted the democratic, peaceful, and value-oriented nature of the newly founded federal state. Germany’s founding is “inspired by the determination to promote world peace as an equal partner in a united Europe,”44 the preamble of the constitution declares.45 The German constitution limits a competitive role, especially in relation to the use of military force, and it prohibits acts with the “intent to disturb the peaceful relations between nations, especially to prepare for a war of aggression.”46 Notwithstanding limited military involvements in such places as the Sahel and slowly growing defense budgets, the noncompetitive nature of Germany is reflected in a

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40 This component of the analysis was informed by a number of anonymous interviews with experts and officials in the relevant countries; they are cited by number only. Interview 5.
42 For the 2016 numbers, see Federal Ministry for Economic Affairs and Energy Public Relations, Facts About German Foreign Trade, Berlin, August 2017.
43 Because of the fact that “its very existence depends on exchange” a high-level advisory group concluded that Germany needs “a strong Europe and a liberal, [rules-based] international order with free and open states and societies” (see Stiftung Wissenschaft und Politik and German Marshall Fund of the United States, New Power, New Responsibility: Elements of a German Foreign and Security Policy for a Changing World, Berlin, 2013, p. 6).
45 Article 1 § 2 of the German Basic Law (see Press and Information Office of the German Federal Government, undated).
46 Article 26 § 1 of the German Basic Law (see Press and Information Office of the German Federal Government, undated).
wider perception of German identity as a “civilian power”\(^\text{47}\) and the related culture of military restraint.\(^\text{48}\)

Despite these general traits, German foreign policy cannot be understood without analyzing the constellation of domestic interests that help shape that policy. One interviewee described Germany as “schizophrenic,” characterized by splits in the perception of Germany’s international role that do not follow traditional party lines.\(^\text{49}\) This is especially present in the conservative wings of the Christian Democratic Union and the Social Democratic Party. These “realist” forces are confronted with proponents of a restrained German foreign policy, which include pro-business members of the Christian Democratic Union (pushed by the pro-Russia business lobby Ostauschuss der deutschen Wirtschaft) and advocates of Germany’s classical Ostpolitik in the Social Democratic Party. A similar split runs through the Green party (Gruene), which deplored Russian action in Ukraine but represents a strong pacifist constituency. On the left and right side of the political spectrum, the Left party (Die Linke) and the Alternative for Germany criticize current policies of the Western and European alliance, especially in regard to competition with Russia.

There is a notable gap between the public opinion and the elite positions on foreign policy matters. Since 2014, German politicians have been trying to persuade the public of the need to be more strongly involved in international crises,\(^\text{50}\) but the push hardly has had a sizable effect on public support. Over half of Germans still preferred international restraint in a 2017 poll.\(^\text{51}\) In regard to Russia, large parts of the German public still have a positive attitude toward Russia: 32 percent of Germans believe that close relations to Russia are more important than to the United States.\(^\text{52}\)

These splits indicate an increasing contestation of foreign policy lines in domestic politics, a phenomenon that is seen by several interviewees as a universal trend in the Western countries.\(^\text{53}\) The sovereign debt crisis in Europe at the end of the 2000s and the migration crisis in 2015 intensified the Eurosceptical and nationalist oppositions in Germany, causing the government to take a more domestic policy focus with the aim to mitigate conflicts between political, social, and geographical divides in Germany.\(^\text{54}\)


\(^{49}\) Interview 4.


\(^{51}\) Körber Stiftung, The Berlin Pulse: Germany’s Foreign Policy Perspective, Berlin, 2017, p. 33. The numbers are even more sobering for those in the elite that argue for an increased military role, as only 34 percent prefer the deployment of armed forces while as few as one out of four Germans holds the view that under certain circumstances war is a necessary means to gain justice (see Markus Steinbrecher, Heiko Biehl, and Chariklia Rothbart, Sicherheits- und verteidigungspolitisches Meinungsbild in der Bundesrepublik Deutschland, Potsdam, Germany: Center for Military History and Social Sciences of the Bundeswehr, 2017, p. 27).

\(^{52}\) Körber Stiftung, 2017, p. 39.

\(^{53}\) Interviews 2 and 5.

Germany’s predominant goal is to preserve the rules, norms, and institutions of the current international order. The 2016 German white paper on security dedicates a whole section analyzing the transition of the international order and defines “maintaining the rules-based international order on the basis of international law” as one of Germany’s security interests. From a German perspective, international institutions harness power and mediate competition.

As with all nations, security is a goal that Germany follows in its external relations. However, a realist interpretation in which states compete over power and security is not common in Berlin and was not mentioned by any interviewee for this study. Rather, a liberal institutionalist view on international relations, in which the anarchic environment can be tamed through systems of regional and global governance and international organizations that serve collective interests, is widely adopted in Germany. Germans see security as a product of order and rules-based conflict mediation rather than as a result of competition.

Several interviewees stated that regional stability on the European continent and its immediate neighborhood is the biggest security concern for Germany. Unstable states and conflicts in the Middle East provide the grounds for terrorism and result in flows of migrants into Europe that are difficult to regulate. The East has historically been a strategic geographic area for Germany and a source of conflicts and wars for centuries. As a consequence, Germany strongly supported NATO’s Eastern enlargement in 1999 and 2004, as well as the EU enlargement rounds in 2004 and 2007. From this perspective, Germany is concerned with the current backsliding of democracy and the rule of law in Hungary and, to a lesser extent, in Poland. The developments challenge the German assumption that the end of the Cold War would firmly set central European countries on a Western trajectory, including the acceptance of democratic norms.

View of Other Challengers
Berlin’s relationship with Moscow has been undergoing a transformation since 2014, when Russia violated international law by illegally annexing the Crimean Peninsula. Germany’s foreign policy elite started hardening its stance on Russia, and Berlin was the driving force behind the adoption of EU’s economic sanctions in 2014. Still, Germany continues to follow a dual track strategy that insists on keeping channels of dialogue open. One challenge for Germany’s
Russia policy is that it risks being undermined by domestic contestation. Many Germans still harbor positive feelings toward their country’s relationship with Russia, although in Germany as in most Western European countries, unfavorable opinions of Russia dominate (59 percent of German respondents according to a 2018 Pew Research Center survey, against 35 percent of respondents harboring favorable views of Russia). However, another poll that same year also shows that 69 percent of German respondents think their country should cooperate more with Russia, while only 41 percent think that Germany should cooperate more with the United States. Mixed perceptions of the United States were likely not improved following the COVID-19 crisis, with the German perception of the United States as the most influential global actor decreasing by 12 percentage points between January and May 2020.

In the meantime, a substantial business lobby in favor of close relations with Russia, called the Ostausschuss der Deutschen Wirtschaft, makes its influence felt in these debates. Some German officials and commentators, in dealing with such issues as the Nord Stream pipeline, argue that West Germany played a critical role in the Cold War through its Ostpolitik effort to engage the Soviet Union and East Germany economically, reducing tensions and promoting change in the east.

This public sentiment limits the German scope for more punitive sanctions and makes Germany a vulnerable target for Russian information campaigns. One example was the erosion of public support for the diplomatic sanctions against Russia after the 2017 poison attack against a double agent in Salisbury. Germany joined other EU member states and the United States in expelling Russian diplomats, after the UK determined it was highly likely that Russia was responsible for the attack. Although the German government agreed to the British assessment, the German public and politicians across the political spectrum were not convinced, and domestic divisions on Russia were revealed. Even among the elite, dialogue and interdependence with Russia continue to be widely seen as assets rather than as vulnerabilities. In late 2020, however, Russia came under intense criticism from the German government for its suspected poisoning of Aleksei Navalny, a Russian political opponent to Putin who was hospitalized in Berlin. This event, occurring less than a year after the assassination of a former Chechen rebel leader in Berlin, created strong tensions between the German and Russian governments.

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64 Interview 3.
65 Interviews 2 and 8. Merkel acknowledged the continuing support for Ukraine as a transit country (see Keith Johnson, “Is Germany Souring on Russia’s Nord Stream?” Foreign Policy, April 10, 2018).
Relations with the European Union and the United States

Europe remains the overwhelming focus of Germany. Almost all interviewees emphasized that Germany’s determination to make the EU a capable international actor has increased.67 According to this view, the EU can serve as a power multiplier in a world where no single European state will be able to compete against rising powers or rein in the forces of globalization. Several interviewees rejected the idea that Germany could try to go global alone and forge bilateral ties with Beijing or Moscow, because of the autocratic turn these powers are pursuing.68 Instead the growing competitiveness between major states reinforces Berlin’s commitment to strengthen Europe.69

Until recently, Germany’s relations with the United States remained broadly positive despite occasional disagreements on specific security policies or issues. However, the uncertainty in relations with the United States also intensified German interest in cooperation on defense matters in the EU, bilaterally and in NATO. Before 2016, European partners had plans to increase their defense cooperation and to define a joint global strategy. In late 2017, 25 EU member states agreed to join the Permanent Structured Cooperation framework that is part of EU’s Common Security and Defense Policy. The Permanent Structured Cooperation allows groups of member states to cooperate on defense projects, jointly develop defense capabilities and deploy them in military operations. Even so, Germany does not necessarily see the EU as the main European security provider (especially not on territorial defense), and it has no desire to undermine NATO.

France is the most important partner for Germany in the effort to strengthen European agency. This has been underlined through bilateral military projects, such as the joint development of a next-generation fighter jet along with Spain and the signing in January 2019 of the Aachen Treaty, which renews and builds on the 1963 Élysée Treaty outlining the friendship between France and Germany.70

However, Germany has had difficulties implementing the shared leadership with France. First, Berlin traditionally wants to ensure that the creation of a Franco-German “core Europe” does not create new dividing lines with Central European member states, such as Poland. For example, it insisted that the Permanent Structured Cooperation should be an inclusive framework with a low threshold for participation, even if this means reducing the overall level of ambition. France, on the other hand, is willing to take more ambitious steps on defense or Eurozone integration, even if it means creating a two-tier Europe. However, Berlin is steadily changing its position as democratic backsliding in Poland and Hungary and the uncompromising stance on migration policies in many Central European member states make a more hard-nosed German policy toward these countries likely.71 Second, the differences between the strategic cultures of Germany and France remain significant. Although France follows

67 Interviews 2, 5, 6, and 7.
68 Interviews 1 and 5.
69 A tangible example is the recent German-French-Italian initiative to curb Chinese takeovers in Europe after China purchased German robot maker Kuka in 2016 (see Interview 8; and Jakob Hanke, “EU’s Big 3 Seek Greater Role for Brussels to Stop Chinese Takeovers,” Politico Europe, August 19, 2017).
71 Interview 2.
concrete operational objectives in the Middle East and North Africa region when pushing for European defense cooperation, Germany sees deepened defense cooperation as a political end in itself.

A second group of important partners for Germany in Europe are the small EU member states. Germany traditionally takes care that the interests of smaller member states, such as the Baltics or Ireland, are disproportionately represented and seeks coalitions of like-minded member states with similar interests. Outside Europe, Germany is strengthening partnerships with like-minded countries with a similar democratic and multilateral orientation, such as Canada, Australia, New Zealand, or Tunisia.

Summary

In sum, the German elites and the wider public are concerned and conflicted about the growing international competition. As the German national security official Thomas Bagger recently explained, many developments since 2012—the ongoing Syrian civil war, Russia’s invasion of Ukraine and annexation of Crimea, China’s rising challenge to international rules—have produced a sense of “disillusionment” with existing conventional wisdom about the inevitable progress of Western Enlightenment values. “The world no longer conforms to German expectations,” Bagger concludes. “Germany has ‘lost its moorings.’”

Although Germany has acknowledged the new era of international competition, it does not embrace competition as a course of action for its own strategy. Germany’s strategy is mainly focused on formal alliances, informal partnerships, and diplomacy to shape the international environment. The strategy has the aim to hedge against the risk of a U.S. retreat from multilateral as well as security commitments and to strengthen partnerships with those countries that are committed to upholding the liberal and multilateral rules-based order.

France

France’s position in the emerging competitive space is one of the most interesting among the set of established U.S. allies and leaders of the global democratic community. The 2017 version of the French national security strategy argues that the country’s role is unique:

France is the only EU country (post-Brexit) that is a permanent member of the UN Security Council, a nuclear power, a founding member of the European Union and NATO, and that retains a full-spectrum and engaged military. Therefore, its ambition must be twofold: to preserve its strategic autonomy and to build a stronger Europe to face the growing number of common challenges.
One notable implication has been a desire to preserve and, in some ways, improve relations with China—a process that, depending on the form it takes, could create tension with a U.S. security policy that seems more intent on confronting Chinese misbehavior.

France’s policy in the past 20 years has been driven as much by a sense of U.S. relative decline and growing international multipolarity as by any belief in continuing U.S. or Western primacy.77 These perceptions accelerated in the wake of U.S. problems in Iraq and then in the financial crisis, and France’s policies are designed to respond to this emerging reality, a broad theme that is powerfully expressed in the latest strategy document. Part of the answer is a greater emphasis on maintaining the Atlantic security architecture, including NATO.

An important aspect of current French foreign and national security policy today is the attitude and ambitions of French President Emmanuel Macron. He is determined to sustain a strong French voice in international affairs and was elected in May 2017 on a strong pro-EU platform. He appears determined to strengthen the strategic partnership with Germany to address the political, financial, and migratory crises that still confront the EU.78

France’s national security strategy seeks to build on classic French objectives. The literature on French foreign and security policy is vast.79 This brief section focuses primarily on the 2017 strategy document in the context of broader shifts in French thinking rather than attempting to offer a comprehensive portrait of French national security concepts.

**Goals, Principles, and Grand Strategy**

Historically, French foreign and national security policy has included several core themes, including French leadership of a unified and powerful Europe; the establishment of an independent and autonomous French voice in world affairs; support for a rules-based multilateral order; and the promotion of values abroad, in part through France’s unique collection of relationships with former colonial nations. In the process, French foreign policy has always reflected a strong emphasis on French greatness and uniqueness, its own version of “exceptionalism.”80 A goal of restoring French greatness has informed postwar French foreign policy and national security strategy, though the means of achieving this has varied and has been largely expressed through leadership of a collective, not independent, form of security—the EU.

France’s global posture, like other major powers, reflects domestic debates about the identity of the nation—its degree, in the French case, of commitment to Europeanist, Atlanticist, or independent foundations for its identity and strategy. France’s commitment to a powerful sense of European leadership and identity is partly the product of geography: France stands in

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the heartland of Europe, and it has been at the core of security threats and trends as they have washed over the continent.\textsuperscript{81} A key challenge has been balancing independent and collective expressions of security—indeed through its separate nuclear deterrent, its full-spectrum military, its occasionally unilateral military actions, and the distance it has kept at times from NATO’s military wing; collective in its emphasis on the post–Cold War international order and the UN system, its deep participation in EU affairs, and its continuing membership in NATO and decision to reintegrate into the military structure in 2009.\textsuperscript{82}

The principle of strategic autonomy remains a primary emphasis of the latest security strategy, which states,

Strategic autonomy remains a key objective of our defence policy . . . due to its decisive impact on our sovereignty and freedom of action. In an international system where instability and uncertainty prevail, France must preserve its capability to decide and act alone to defend its interests. This autonomy is a condition to France’s credibility in the eyes of allies and partners.\textsuperscript{83}

Recent statements suggest that France is concerned that these objectives are becoming more threatened. The 2017 strategy refers to the “lasting deterioration of the international environment.”\textsuperscript{84} The document represents a continued emphasis on nonstate threats and a broad conception of security, including terrorism, demography, migration, and instability in nearby regions, but the strategy has more of a self-conscious focus on rising great-power threats than recent counterpart documents in the UK or Germany. It repeatedly emphasizes the importance of an advanced, full-spectrum military and the risks of growing competition in such domains as cyber and space. It expects demands on the French military to grow significantly in the coming years. The preface signed by Macron concludes that “On the international stage, the threat of a major conflict is once again a possibility. Assertive powers and authoritarian regimes are emerging or re-emerging, while multilateralism appears to be giving way to the rule of force.”\textsuperscript{85}

The document specifically refers to the “return of military rivalry.” It refers to the rise of “contested spaces,” including the maritime, space, and cyber domains. The document spells out the implications for French military policy of competition, arguing that

we must be able to shoulder our responsibilities, under any circumstance, in a military confrontation with state actors. The likelihood of such a confrontation is reinforced by the more intense strategic rivalry between great powers and the ensuing escalation risks. Such circumstances, which imply more challenging and state-on-state engagements, require our

\textsuperscript{82} Even that, however, has come with uniquely French characteristics that continue the balancing exercise (see Pernille Rieker, “The French Return to NATO: Reintegration in Practice, Not in Principle,” \textit{European Security}, Vol. 22, No. 3, 2013.
\textsuperscript{83} Republic of France, 2017, p. 54.
\textsuperscript{84} Republic of France, 2017, p. 85.
\textsuperscript{85} Republic of France, 2017, p. 5.
armed forces to possess modern combat capabilities, and to be able to engage in high-intensity operations, along with allies and partners operating leading edge capabilities.\textsuperscript{86}

The 2017 strategy also contains a strong emphasis on the challenge of conflict below the threshold of war. The report argues, in a powerful passage worth quoting at length:

State and nonstate actors now have access to a significantly wider range of tools for achieving their political goals without having to engage their military capabilities in direct confrontations. The new domains of confrontation (cyberspace and outer space) and the vastly expanded scope for action in the information field (e.g., Internet, social media, and digital propaganda) enable remote action, unconstrained by boundaries between states’ “inside” and “outside” or by the usual distinction between peace, crisis, and war times. These levers are all the more attractive that they are largely unregulated by law, barely subject to control, and that attribution of actions remains a central challenge. Rather than pursuing physical assets, they target objectives directly at the heart of societies (e.g. critical infrastructures and resources), as well as their intangible dimensions (morale and political cohesion). Conventional propaganda tools deployed by way of official media and covert means of action now combine with social media trolls and groups of hackers. . . . Ambiguous postures and covert aggression are also becoming more common, with certain states making an increasing use of a wide variety of proxies, ranging from manipulated diasporas to militias and other armed groups capable of stalemating conventional forces.\textsuperscript{87}

Such a description would clearly fit actions undertaken by Russia, whose media President Macron depicted as “agents of influence” in front of Putin during his May 2017 state visit.\textsuperscript{88} Yet France remains first and foremost concerned by the ability of ISIS to carry out such actions, as the Islamist group has targeted repeatedly French citizens on French territory and shows an ability to radicalize individuals through propaganda; infiltrate operatives in France; and threaten French forces deployed abroad.

In pursuing these objectives in such a complex international environment, the 2017 French strategy outlines two basic pillars fully in line with traditional French foreign policy themes: (1) sustain and strengthen France’s autonomous capabilities, and (2) strengthen EU coordination mechanisms, such as the European Defense Fund and the Permanent Structured Cooperation.\textsuperscript{89} But the document also commits France to closer cooperation with NATO in responses to Russian aggression, such as the Enhanced Forced Presence efforts in Eastern Europe. The 2017 document mentions Germany and the UK as especially important ongoing partners for defense cooperation; this continues a trend in recent years of reemphasizing the strategic relationship with Germany, and boosting the partnership with the UK, as part of its general security approach. Like all other major powers, France is emphasizing enhanced strate-

\textsuperscript{86} Republic of France, 2017, p. 51.
\textsuperscript{87} Republic of France, 2017, p. 47.
gic partnerships with important developing nations and major powers in the Middle East, with India, Australia, Japan, Singapore, Indonesia, New Zealand, Malaysia, and Brazil.\(^\text{90}\)

In the document and in Macron’s speeches on foreign policy, France has continued to emphasize the importance of the postwar international order as the basic framework for international politics. In a 2017 speech, Macron said that “France can only be attractive if it influences the rules that apply internationally. I want it to be more affirmatively involved in the bodies that design and decree them and, more generally, for France to once more become a place where the world is thought out.”\(^\text{91}\)

In his April 25, 2018, speech to the U.S. Congress, Macron placed particular emphasis on this theme of a multilateral order. “It is a critical moment,” he argued. “If we do not act with urgency as a global community, I am convinced that the international institutions, including the UN and NATO, will no longer be able to exercise their mandate and stabilizing influence. We would then inevitably and severely undermine the liberal order we built after World War II. Other powers, with a stronger strategy and ambition, will then fill the void we would leave empty. Other powers will not hesitate one second to advocate their own model, to shape the 21st century world order.”\(^\text{92}\)

**View of Other Challengers**

Broadly speaking, France’s view of the primary challenger states is not as anxious as the United States. Since the end of the Cold War, for example, France has broadly supported strong engagement of Russia to bring it into the European security architecture rather than leave it alienated from Europe. It has been an advocate of continued engagement after 2014 and, partly as a result of French economic interests, has been somewhat less supportive of the toughest sanctions on Russia. At the same time, the Macron administration has taken a proactive attitude toward engaging China, with presidential visits and a public commitment to help lead Europe’s interaction with Beijing. The spirit of French policy seems strongly oriented toward continued engagement.

Recently, however, France’s position on both Russia and China has been evolving—more slowly than the United States, but definitely in the direction of a more competitive view of the strategic context.\(^\text{93}\) This is partly a product of notable Russian meddling in French political affairs, the perceived alignment of far-right parties in France with Russia,\(^\text{94}\) the significant government and nongovernmental efforts to counteract Russian election influence, and the reaction to the suspected poisoning cases of Skripal in 2018 and Navalny in 2020. In the wake of the elections, in a May 2017 meeting, Macron issued blunt warnings to Putin about Russia’s

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\(^{90}\) France’s 2017 national security strategy argues that looking ahead to 2030, maintaining such a model will require a national military build-up, augmented by effective cooperation. More than in the past, we must strengthen the links between national strategic autonomy and European ambition, as well as between national and shared interests (see Republic of France, 2017, p. 51).


\(^{92}\) For the text of the speech, see “Emmanuel Macron’s Speech at the United States Congress,” Voltaire.net.org, April 25, 2018.


role in Syria and in French electoral politics. During a May 2018 state visit, President Macron took a broadly friendly approach and proposed several areas for joint initiatives, but made clear references to French and European desires to respect international norms and work through global and regional institutions.

France’s recent strategy document placed a significant focus on the growing Russian threat. “Europe’s eastern and northern flanks have experienced the reassertion of Russian power and the resurgence of war,” the report argues. Russia, the document warns,

seeks to undermine the transatlantic relationship and to divide the European Union. In an unprecedented way since the end of the Cold War it pursues a policy of all-out assertion (Eastern flank, the Mediterranean Sea, Syria, the Balkans) and across all domains. This approach follows its policy of a “sphere of influence” and goes hand in hand with various worrisome forms of strategic intimidation.

Partly as a result of these perceptions, despite uneven support for sanctions against Russia in the French public, Paris recently indicated that it saw no opportunity for a near-term relaxation. Yet the French government is also mindful of the many business interests that French companies hold with Russia, and is aware that the French population generally favors good Franco-Russian relations (although Russian attempts to influence the 2017 election resulted in a serious degradation of Putin’s image). Overall, Macron’s Russian policy is in continuity with the two-pronged approach of his predecessor François Hollande, which combined coercive measures—such as sanctions—with continued engagement on issues of common interest, such as counterterrorism.

French documents also offer an increasingly open acknowledgment of troubling Chinese behavior. The 2017 security strategy, for example, noted China’s seeming ambition to overtake the United States in military terms and noted that “The South and the East China Seas remain the priority areas of China’s assertive policy, with Beijing invoking ‘historical rights’ and creating fait accompli situations by building of artificial islands or attempting to set up an Air Defence Identification Zone.” In his major 2017 foreign policy address, Macron indicated that “I want to continue this effort and forge a solid, enduring relationship with China—our neighbour in the Security Council.” But the speech also emphasized France’s determination to sustain international norms and promised a relationship with China “that will help safeguard international stability but leave no ambiguity over the balance and values underpinning it.”

Like the UK and Germany, France remains committed to enhancing economic relations with China. Macron has referred to the desire for a “special strategic relationship” with Beijing and downplayed some proposals made during the campaign for new efforts to safeguard France against Chinese predatory investments. During a January 2018 state visit to Beijing,

100 Republic of France, Ministry of Europe and Foreign Affairs, 2017.
Macron did, however, emphasize the importance of reciprocal trade opening, referring again to unfair Chinese trade practices. Yet Macron has also warned against the threat posed by a rising China, whose Belt and Road Initiative is being embraced by some European states and seen with suspicion by others. In March 2019, Macron called for tougher European rules on Chinese investments and stated before other European states, “For many years we had an uncoordinated approach and China took advantage of our divisions.” The COVID-19 crisis created further tensions. In April 2020, the Chinese ambassador in Paris was summoned by the French Minister of Foreign Affairs in relation to a statement criticizing how Western countries, including France, were handling the health crisis. France has also been highly critical of China’s treatment of its Uighur minority and imposition of a national security law in Hong Kong.

France is one of the more hawkish European states regarding Iran’s nuclear aspirations and broader regional role, to the point of debating with the Obama administration over concessions offered to Tehran during the nuclear negotiations. It has attempted to push Europe into tougher sanctions and a more open confrontation of Iranian influence. Once the nuclear agreement was signed, France became a strong advocate and has criticized the U.S. withdrawal and suggested an intent to preserve the deal. But it has also continued to demand that Iran constrain activities, such as its ballistic missile program.

In sum, France’s attitude toward the three main challenger states called out in the national defense strategy is significantly supportive of the U.S. sense of competition for all three.

Relations with the United States
France has had a complex relationship with the United States since the 1950s. However, in recent years, the relationship has been broadly businesslike and cooperative in many areas. Counterterrorism tops the list, a leading priority for both countries, but other areas of collaboration include Iran, France’s support for U.S. policy toward North Korea, U.S. logistical support for France’s intervention in Mali, joint action in Libya, and much else. France’s partial re-embrace of NATO in recent years has triggered increased cooperation within the military elements of the alliance. As one scholar explained in 2018, “In a complete reversal of fortune from 15 years ago, France is now celebrated in Washington as a reliable military ally, able and willing to intervene to defend its security interests and those of its allies.” The 2017 strategy suggests that “the United States is a fundamental partner, due to the convergence of defence

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107 Celia Belin, “Can France Be America’s New Bridge to Europe?” Foreign Affairs, April 19, 2018.
and security interests, and the strength of existing operational and intelligence ties. This special cooperation must be maintained and given close attention by both sides.”

It is critical to understand, however, that France has its own, milder version of the Russian and Chinese style of resentment against the degree of U.S. predominance in the post–Cold War order. It has always been unsatisfied with the degree of U.S. predominance on global issues and equally affronted when Washington took unilateral actions—whether on climate, the invasion of Iraq, or other issues—that made clear the limits of Paris’s influence over U.S. policy. Therefore, France has used several approaches over the years, from European autonomy to friend of the nonaligned movement, to carve out a distinct space for itself under the U.S. shadow. And between general global trends and the U.S. broadcasting of a “Pivot to Asia” policy, many French officials and scholars have thought for some time that the United States was making itself less central to European security issues.

This history makes the present moment and the near future especially interesting. In recent years, France has edged closer to the United States in many areas even while hardening its commitment to the importance of an independent posture. The emerging strategic competition could theoretically intensify either of these trends in French policy.

Summary

France is a country with a significant tradition of international activism, both within Europe and beyond, that President Macron is determined to reaffirm. France’s perceptions of major challenger states do not precisely match those of the United States but nonetheless provide the basis for extensive cooperation—if the United States chooses to engage on terms that France can accept. Among established democracies and formal U.S. allies, France is one of the most energetic, at least for now, in defending shared visions of a multilateral order, democratic values, and nonaggression. However, its degree of patience with U.S. predominance may continue to wane, especially given the perception of the relative decline of U.S. power and the impact of emerging U.S. policies on the postwar order.

Japan

Despite being a revisionist power in the early 20th century, Japan has been a status quo power since the end of hostilities in 1945. Its record provides abundant evidence to support the argument that Japan is a hyper-status quo power: Highly satisfied with the current international system and seeking to protect the current order, Japan’s international agenda appears solely aimed at upholding and strengthening all elements of that order. Publicly, Japanese officials will point to many challenges to the order that are making Japan’s security environment an “increasingly severe” situation, including terrorism, North Korea, and climate change. However, privately, China’s rise is an ever-present concern. Japan’s approach to bolster the international order and put pressure on China is called the Free and Open Indo-Pacific concept. Japan, however, does not call it a strategy. Although it is arguably a regional strategy, it is unclear whether it constitutes a “grand strategy.”

Goals, Principles, and Grand Strategy
Tokyo sees itself as a major power with a large stake in the current international order. Former Prime Minister Abe Shinzō provided a clear insight into the thinking of Japan during a speech in Washington, D.C., shortly after returning to the premiership in December 2012: “Japan is not, and will never be, a tier-two country,” he insisted. “That is the core message I am here to make. And I reiterate this by saying, I am back, and so shall Japan be.”

Abe’s view is not unique. Japanese leaders for decades have viewed their country as an integral actor in world affairs, as do Abe’s successors. Like other major powers, this means that Japan wants to have a say on any major international issue that affects its interests and involvement in most global processes and institutions. But Japan differs from other major powers in that it does not necessarily seek tangible forms of formalized status, nor does it seek predominance over its neighbors or region. Most crucially, unlike the great powers of the world, Japan does not believe it is entitled to break international rules. Quite the contrary, Japan seeks to uphold those rules because it sees these as the pillars of the international order.

The most fundamental aspect of Japan’s security strategy is its reliance on and support for the postwar international order. Japan accepts the fact that the order was U.S.-built and is U.S.-led. Japanese leaders often credit the United States for its efforts. This strategic principle holds that it is in Japan’s national interests, particularly in the Indo-Pacific region, to strengthen the free trade regime and maintain and protect the international order “based on rules and universal values, such as freedom, democracy, respect for fundamental human rights, and the rule of law.”

The reason is simple: For Japan, current rules and laws govern behavior. Without these, the region will be governed by power politics. For Japan, “The least desirable state of affairs is having to fear that coercion and threats will take the place of rules and laws and that unexpected situations will arise at arbitrary times and places.” Such a world is abhorrent for Japan, which tried that path once in the early 20th century and courted disaster. Given this, “Japan wants to safeguard in every respect . . . the free, liberal, open international order and multilateral frameworks.”

Japan’s international agenda seeks to uphold and strengthen all elements of that order—and to do so multilaterally, hand-in-hand with other countries as well as international orga-

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110 Official Website of the Prime Minister of Japan and His Cabinet, 2018.


114 Official Website of the Prime Minister of Japan and His Cabinet, “Remarks by Prime Minister Shinzo Abe to the Australian Parliament,” Canberra, July 8, 2014c.

nizations. First and foremost, this means the United States and other countries with which Japan shares “fundamental values, such as freedom, democracy, human rights, and the rule of law”—such countries as members of the Association of Southeast Asian Nations, European powers, Australia, and India. Japan also highlights its proactive use of multilateral arrangements, such as Japan-U.S.-Republic of Korea, Japan-U.S.-Australia, Japan-U.S.-India, Japan-U.S.-Australia-India (i.e., Quadrilateral Security Dialogue) arrangements and larger multilateral frameworks described next.

Japan also looks to a myriad of existing international organizations and frameworks for ways of buttressing the postwar order. Japan emphasizes the need to use established mechanisms to promote peaceful settlement of disputes and maintain international legal order. Toward that end, Japan “promotes rule-making and the implementation of these rules” and “proactively cooperates with international judicial organizations, such as the International Court of Justice (ICJ), the International Tribunal for the Law of the Sea (ITLOS), and the International Criminal Court (ICC).” The only “new” framework referenced as important to Japan is the Comprehensive and Progressive Agreement for Trans-Pacific Partnership—precisely because of its potential to serve as a vehicle to further entrench free trade and thus support the existing order.

Importantly, Japan seeks a more-active role in the current system. This sentiment has been particularly strong since the Abe administration came to power in 2012 and appears to remain strong. In a speech at the Hudson Institute in 2013, Abe said, “Japan should not be the weak link in the regional and global security framework where the U.S. plays a leading role. Japan is one of the world’s most mature democracies. Thus, we must be a net contributor to the provision of the world’s welfare and security. . . . Japan will contribute to the peace and stability of the region and the world even more proactively than before.” Abe’s successor, Suga Yoshihide, continued this sentiment, telling the UN in September 2020 that “Japan will continue to contribute to sustaining peace . . . engaging in strengthening institutions and building capacities.” Japan’s desire to play a more-proactive role tends to be in areas that reinforce Japan’s contributions to human security and highlight Japan’s strength as a civilian power in

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116 Official Website of the Prime Minister of Japan and His Cabinet, "Policy Speech by Prime Minister Shinzo Abe to the 187th Session of the Diet," Tokyo, September 29, 2014d.

117 Official Website of the Prime Minister of Japan and His Cabinet, "Policy Speech by Prime Minister Shinzo Abe to the 196th Session of the Diet," Tokyo, January 22, 2018.


119 For example, Japan’s Diplomatic Bluebook 2017, in reference to the necessity to develop cooperative relations with like-minded partners amid the “increasingly severe environment” and the importance of maintaining the current rules-based economic order, specifically signals out NATO, the EU, the Association of Southeast Asian Nations, the East Asian Summit, the Association of Southeast Asian Nations Regional Forum, the World Trade Organization, the Asia-Pacific Economic Cooperation, the Organisation for Economic Co-operation and Development, and the G-7/G-20 (see Ministry of Foreign Affairs of Japan, 2017, pp. 12, 36).

120 Ministry of Foreign Affairs of Japan, 2020c, p. 22.

121 Official Website of the Prime Minister of Japan and His Cabinet, “Remarks by Prime Minister Shinzo Abe on the Occasion of Accepting Hudson Institute’s 2013 Herman Kahn Award,” New York, September 25, 2013b.

such areas as international development, humanitarian affairs, disaster relief, encouragement of nonproliferation, and diplomatic efforts to promote liberal values.

In only one area of the existing order does Japan seek change: UN Security Council membership. Japan prides itself on its contributions to the UN and being an active UN member. Over the 60 years of its membership, the cumulative total of Japan’s assessed contributions to the UN and assessed contributions to peacekeeping operations that Japan has paid exceeds $20 billion, making it second only to the United States in terms of financial contributions. Since January 2016, Japan has been serving as a nonpermanent member of the UN Security Council, which is more frequent than any other UN member states. However, Japan also urges reform and seeks membership as a permanent Security Council member.

In August 2016, Abe unveiled Japan’s strategy at the Tokyo International Conference on African Development in Africa. It is known as Japan’s Free and Open Indo-Pacific strategy, although Tokyo does not officially refer to it as a “strategy.” In it, Abe laid out his vision of Japan bearing “the responsibility of fostering the confluence of the Pacific and Indian Oceans and of Asia and Africa into a place that values freedom, the rule of law, and the market economy, free from force or coercion, and making it prosperous.” In the years since, Abe has heavily promoted the strategy. Abe’s successors continue this effort. In interviews for this project, officials said it represented Japan’s grand strategy.

There are numerous documents that describe the Free and Open Indo-Pacific concept, but the concept can best be understood by breaking it down into three main pillars. According to Japan’s Ministry of Foreign Affairs, the three pillars of Free and Open Indo-Pacific are

1. promotion and establishment of the rule of law, freedom of navigation, free trade, and more
2. pursuit of economic prosperity (improving connectivity and strengthening economic partnerships)
3. commitment for peace and stability (capacity-building on maritime law enforcement, human assistance/distance response cooperation, and more).

Viewed collectively, the aim of Japan’s Free and Open Indo-Pacific concept is to promote peace, stability, and prosperity from Africa to Asia (and everything in between). Japan’s

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123 Official Website of the Prime Minister of Japan and His Cabinet, “Address by Prime Minister Shinzo Abe at the Seventy-First Session of the United Nations General Assembly,” New York, September 21, 2016c.
124 Ministry of Foreign Affairs of Japan, 2020c, p. 216.
125 For example, then–Prime Minister Abe said, “We consider it extremely regrettable that the Security Council’s structure is still frozen in a state that reflects the realities of some 70 years ago.” He continued: “The Security Council must be reformed without delay. Japan’s aspiration to become a permanent member of the Council has not changed in the slightest” (see Official Website of the Prime Minister of Japan and His Cabinet, “Address by Prime Minister Shinzo Abe at the Sixty-Eighth Session of the United Nations General Assembly,” New York, September 26, 2013c); Prime Minister Suga has continued this sentiment, saying: “UN reform, including the reform of the Security Council to reflect the realities of the 21st century, is an urgent task as the UN marks its 75th anniversary” (see Ministry of Foreign Affairs of Japan, 2020a).
126 Official Website of the Prime Minister of Japan and His Cabinet, “Africa,” speech at the opening session of the Sixth Annual International Conference on African Development, Nairobi, August 27, 2016b.
127 Office of the Prime Minister of Japan and His Cabinet, “Prime Minister Suga’s Policy Address to the 203rd Extraordinary Diet Session,” Tokyo, October 26, 2020.
goal focuses on fostering the region as an international public good through the upholding of the rules-based international order, including the rule of law, freedom of navigation, peaceful settlement of disputes, and the promotion of free trade. Although Japanese officials tend to emphasize Japan’s support of stability, the existing order, and the promotion of infrastructure investment and development as a means to enhance regional “connectivity,” the strategy also clearly aims to counter China. Not only does it attempt to expand the number of stakeholders with which to partner, it also offers Japanese assistance as an alternative to Chinese assistance, with the intention to increase the capacity of states to withstand Chinese pressure. But it is unclear how the Free and Open Indo-Pacific strategy prepares Japan (or the region) to deal with the rapidly changing order and threats from China. Instead, some have questioned whether the Free and Open Indo-Pacific is nothing more than “window dressing for the pursuit of Japan’s narrow economic and strategic interests.”

**View of Other Challengers**

Japan sees international affairs as increasingly filled with security challenges. However, both government documents and leaders tend to avoid publicly framing this environment as one tilting toward competition. Instead, the norm for most of the Abe administration has been to describe concern over “an increasingly severe security environment” and “complex and grave national security challenges,” but this changed in recent years. For example, in the 2020 annual defense white paper from Japan’s Ministry of Defense, the government describes the current security environment as one where the balance of power is changing, uncertainty over the existing order is increasing, and interstate competition across political, economic, and military domains is emerging. Other aspects of the changing security environment include gray zone activities; North Korean missiles and nuclear weapons; global terrorism; proliferation of weapons of mass destruction; risks and threats in cyberspace and outer space; new technologies; economic protectionism; and even climate change.

Historically, Chinese activities have not been openly criticized in Japan’s official documents. Although some speeches by Japanese officials do treat Chinese activities as examples of the increasingly severe environment confronting Japan and the world, these mentions are usually implicit. These references, however, have gradually become more explicit. Japan’s national security strategy argues that “China has taken actions that can be regarded as attempts to change the status quo by coercion based on their own assertions, which are incompatible

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131 Ministry of Foreign Affairs of Japan, 2013, p. 3.


133 Ministry of Defense of Japan, 2020; Ministry of Foreign Affairs of Japan, 2020c; Official Website of the Prime Minister of Japan and His Cabinet, “New Year’s Reflections by Prime Minister Shinzo Abe,” January 1, 2016a; Official Website of the Prime Minister of Japan and His Cabinet, “Japan and NATO as ‘Natural Partners’—Speech by Prime Minister Abe,” May 6, 2014a; Official Website of the Prime Minister of Japan and His Cabinet, “Press Conference by Prime Minister Shinzo Abe,” September 25, 2015c.

134 For example, “In the East and South China Sea, there have been frequent attempts to unilaterally change the status quo by force or coercion” (see Official Website of the Prime Minister of Japan and His Cabinet, 2014a).
with the existing order of international law, in the maritime and aerial domains, including the East China Sea and the South China Sea.” Furthermore, the Diplomatic Bluebook 2017 notes that “China continues actions and unilateral attempts to change the status quo at sea and in the airspace in areas, such as the East and South China Sea based on its own assertions, which are incompatible with the existing order of international law of the sea.” In the 2020 annual white paper from Japan’s Ministry of Defense, in addition to repeating language already referenced, Japan is explicit in the danger that China poses. Specifically, the publication says:

China . . . continues to act in an assertive manner, which includes dangerous acts that could cause unintended contingencies. Additionally, China continues to demonstrate its willingness to realize its unilateral assertions without making any compromises, steadily moving forward with efforts to change the status quo by coercion and to create a fait accompli.

In informal discussions in Tokyo, however, the idea of an intensifying competition with China is even more prevalent. There are two broad ways this competition is usually framed. One depicts Japan and China as direct competitors; because the two countries are “historical rivals,” some see it as “inevitable” for the two to compete with one another. This view contrasts the character of the historical competition that Japan has had with China that focused largely on military rivalry with the current relationship today, which is marked by “full domain competition” that goes beyond military competition into such areas as economics, investment, aid, ideas, and values.

Within this view, most seem to believe that the security competition is zero sum. Whether it be China’s opaque military budgets, new interpretations of international law, or its provocative actions in the East China Sea to assert sovereignty and change the status quo, Tokyo views any wins by China as losses for Japan’s security situation. Tokyo looks to China’s artificial land reclamation in the South China Sea as a process of demonstrating China’s will to dominate and claim sovereign territory of others so long as it does not face any obstacles. All of this is seen as having a deleterious effect on Japan’s security. As one official said, it shows how China is “quite vicious about dominance in the Western Pacific.” And because of this, the two “compete over who can maintain dominance in the region,” with Japan supporting the United States.

In economic interactions, on the other hand, Japan can have positive-sum, win-win interactions with China. No one denies that the two economies are interdependent; Japan needs access to China for its prosperity to continue. According to one former Japanese official, it goes beyond prosperity: Japan “can’t survive without its interdependent relations with China.” Importantly, China largely works within the established order (even sometimes taking advantage of it), thereby reducing any potential for friction with Japan because China is not challenging the status quo.

In development and infrastructure investments, although there is some concern about potential risks of China’s Belt and Road Initiative creating infrastructure that will be for China’s exclusive use, the prevailing view is these investments are not zero-sum coercive measures. Rather, they are competition via dueling “charm offenses” where China and Japan extend cooperation to other countries in the hope of gaining influence. Influence, in turn, creates more of a formable international environment for Japan to ensure prosperity and security. This is “not in-your-face competition,” one interlocutor in Tokyo suggested, but rather is “much more nuanced. We offer alternatives to other countries” because “we need support from the region to back our way . . . [and] we want countries to follow the same path Japan has taken.”

A second view of competition found in Tokyo frames the two countries as engaged in a more indirect competition for the character of the international system, something that goes well beyond the narrower bilateral sense of the first vision of competition. From this perspective, in addition to the direct competition with China, the two also compete for their separate visions of the international order. For Japan, any power that tries to challenge the existing status quo order is a threat. Tokyo sees China and Russia (examined later in this chapter) as two countries “not comfortable with the international order and trying to fundamentally change that order” in ways more favorable to them. Because Tokyo “can’t live with China trying to change the rules and norms” and is “concerned about a Chinese international order prevailing in the world,” Japan finds itself in competition with China.

Importantly, despite Japan’s support for the current order and concerns over China’s attempts to challenge it, Tokyo harbors little concern about Russia. In 2020, the Japanese government said that “Bilateral relations between Japan and Russia have the greatest underlying potential” and that building stable relations and deepening cooperation would “contribute not

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153 Anonymous H, interview with author, March 13, 2018. Similar comments were received from Anonymous P and Anonymous J.
only to Japan’s national interests but are also extremely important for regional stability and development.  

Although Tokyo sees Russia as a challenger to aspects of the U.S.-led order, it does not view itself in competition with Moscow like it does with Beijing for three primary reasons.

First, unlike China, Japan does not view Russia as an expansionist power seeking territory it does not already own. Although Russia maintains control over four islands in the southern Kuril Islands, which Japan claims as the Northern Territories, Moscow acknowledges the dispute and is willing to talk to Tokyo about possible paths toward resolution. Although Tokyo recognizes that Russia maintains a considerable scale of military forces in the Far East and that these forces in the vicinity of Japan are generally increasing their activity, Tokyo does not believe Moscow harbors any intent to attack Japan. Although Russia has the power to harass Japan, and does occasionally via incursions into its airspace, Russia is “not coming to Japanese territory to take it over.” This is important because it forms a view in Tokyo that “Russia doesn’t look expansionary” and is therefore less threatening. Because Russia has drawn down the scale of its troops and presence in the Far East compared with the past, Tokyo does not view Moscow today as wanting to change the status quo in the region or being capable of doing so. Therefore, Moscow “does not pose a direct threat to Japan anymore.”

The second reason Tokyo does not see itself in competition with Moscow has much to do with the perception in Tokyo of what Russian activities represent. Japanese officials do not deny that Russia’s actions in Ukraine were an affront to the international order and rule of law, but Tokyo sees Russia’s main objectives as survival and wanting to regain past prestige, not establish a new international order. Lastly, Tokyo sees Russia as a declining power whose best days are behind it. Because it is declining, Tokyo sees a reduced ability for Moscow to influence Japan’s security, particularly because it will struggle to strengthen or raise its military capabilities in any significant way. Therefore, “we don’t pay [the] same level of attention on Russia as China.”

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157 Ministry of Defense of Japan, 2020, p. 120.
Summary

Japan is actively involved in all aspects of the international order. Given that the international order both benefits Japan and provides some modicum of influence, Japan not only works through its established frameworks, it seeks to uphold and strengthen it. Like other countries, Japan’s first priorities are its national interests. But Japan remains strongly tethered to the international order under which it has thrived.

Australia

Australia’s identity as a strategic actor can be traced to its nexus at the center of several competing historical influences. As a former colony of the UK, the country has maintained strong relationships with that country and other Commonwealth states, none more so than neighboring New Zealand. However, during World War II, as the UK was suffering repeated defeats at the hands of the Japanese, Australia realized it could no longer look to London for security guarantees and foreign policy guidance. This led to an alliance with the United States, which remains Australia’s closest and most important security relationship.

Perhaps because of its important relationships with the UK, New Zealand, and the United States, Australia places a large emphasis on multilateralism and a “rules-based global order.” Australia was a founding member of the UN; is a member of the ANZUS Pact between Australia, New Zealand, and the United States; maintains membership in the Commonwealth of Nations; has signed the Treaty of Amity and Cooperation in Southeast Asia; is a founding member of the Pacific Islands Forum; has joined a mutual security treaty with the UK, New Zealand, Malaysia, and Singapore known as the Five Power Defence Arrangements; and is a member of other more general international organizations, such as the G20 and Organisation for Economic Co-operation and Development.

Australia is also a significant regional actor and is the most prosperous and powerful country in the South Pacific, where it has assumed a leadership role. It has sponsored Indo-

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168 Australia Department of Defence, 2016, p. 15.
170 The Commonwealth, “Member Countries,” webpage, undated.
174 Australia, according to the World Bank, has the world’s 13th largest economy. In Southeast Asia, the largest is Indonesia, which is the world’s 16th largest economy (see World Bank, “GDP: All Countries and Economies,” webpage, undated-a.
nesia’s and Papua New Guinea’s independence and led peacekeeping missions to East Timor. Australia has also played an active role in Polynesian affairs, at one point placing sanctions on Fiji in response to the 2006 military coup in that country.175

The 2016 Defence White Paper and 2017 Foreign Policy White Paper show Australia’s worldview is rooted in unease and concern. Australians see a world of “greater security uncertainty and complexity” that is characterized by challenges to the “rules and principles that underpin international cooperation.”177 The documents share a concern with one leading trend: The shifting relationship between the United States and China at a time of declining U.S. power vis-à-vis China and U.S. domestic instability.178

In response to this fraught outlook, the two white papers outline a series of goals for Australia. Both place preeminent emphasis on maintaining the U.S.-Australian alliance.179 Australia’s second goal is the maintenance and promotion of the rules-based global order. The Defence White Paper argues, “The stability of the rules-based global order is essential for Australia’s security and prosperity. A rules-based global order means a shared commitment by all countries to conduct their activities in accordance with agreed rules which evolve over time, such as international law and regional security arrangements.”180

The third goal of Australia is to increase its own capabilities and reinforce its regional partnerships and alliances.181 This increased emphasis on the area close to home and on Australia’s own military capabilities shows Australia’s desire to be a “middle power” that can exert regional influence independent of the global superpowers.182 That regional influence can be seen in former Prime Minister Malcolm Turnbull’s intense efforts to revive the Trans-Pacific Partnership, now the Comprehensive and Progressive Agreement for Trans-Pacific Partnership.183

The fourth goal of Australia’s foreign policy is to somehow maintain close economic ties with China while at the same time balancing against China’s expansionist tendencies. Concerns about China dominate Australian thinking to the point that one scholar argues that references to the United States and the rules-based global order are indications of Australia’s


177 Australia Department of Defence, 2016, p. 9; Australia Department of Foreign Affairs and Trade, 2017 Foreign Policy White Paper, Commonwealth of Australia, November 2017, p. 6.

178 Australia Department of Defence, 2016, p. 15.

179 One commenter goes so far as to say that Australia “has bet the farm on Donald Trump.” See Daniel Flitton, “Foreign Policy White Paper: Australia Faces an Uncertain World,” Lowy Institute, November 23, 2017. See also Graeme Dobell, “Seven Defence White Papers by the Numbers,” Australian Strategic Policy Institute, March 7, 2016; Australia Department of Defence, 2016, p. 15; and Australia Department of Foreign Affairs and Trade, 2017, p. 26.

180 Australia Department of Defence, 2016, p. 15.

181 Australia Department of Foreign Affairs and Trade, 2017, p. iv.


growing worry, writing that “these days when Australia talks about the United States, often it’s really thinking about China.”

The final goal of Australian foreign policy is the continued desire to protect Australians from terrorism and participate in the larger global struggle against terrorism. This concern is understandable in light of terrorist attacks on Australian soil, most notably the 2014 Sydney café attack. By one estimate, at least 120 Australians were foreign fighters for ISIS in 2014.

China is the threat that underlies all Australian strategic decisions and the reason why Australia is so concerned about maintaining both its alliance with the United States and the stability of the rules-based global order. The 2017 Foreign Policy White Paper goes on to note that while Australia “is committed to strong and constructive ties with China,” any closer relationship “will be accompanied by friction arising from our different interests, values and political and legal systems.”

Areas of tension between China and Australia include freedom of navigation in the South China Sea and Chinese influence in Australian politics and universities. Any political and military tension with China is complicated by the fact that China is both the biggest importer of goods to Australia and the biggest market for Australian exports.

Australia’s relationship with Russia is characterized by occasional cooperation in regional forums, frequent disputes over certain Russian actions, and deep distrust, which is unsurprising given Australia’s belief in a rules-based global order. Australia joined other nations in issuing sanctions on Russia in response to its aggression against Ukraine. Australia has also joined other countries in expelling Russian diplomats following the Skripal poisoning. The gravest incident in Russian-Australian relations occurred when MH17 was shot down over Ukraine in 2014, killing 38 Australians. Tensions spilled over into the 2014 G20 summit in Brisbane during which a concerning number of Russian warships approached the northern Australia coast. In response to Russia’s pattern of irresponsible behavior, including its interference in other nations’ elections, Prime Minister Turnbull stated, “Russia is threatening the democratic world right around the world.”

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184 Dobell, 2016.
185 Australia Department of Defence, 2016, p. 15; Australia Department of Foreign Affairs and Trade, 2017, p. 3.
188 Australia Department of Foreign Affairs and Trade, 2017, pp. 4, 40.
190 Australia Department of Foreign Affairs and Trade, "Trade," webpage, undated-b.
Australia has generally had more-cordial relations with Iran than other Western powers, in part because of the distance between the countries and in part because of an effort by Australian leaders to maintain a constructive trade relationship regardless of political differences, in the hope that such a relationship would provide more helpful leverage than mere hostility. Australia has followed the UN sanctions regime against Iran and has lifted some sanctions in accordance with the Joint Comprehensive Plan of Action, a stance that has not changed despite the U.S. withdrawal. Currently, Australia cooperates with Iran on two major issues: (1) stopping the flow of Iranian asylum seekers to Australia and (2) fighting the Islamic State.

Summary of Allied Perspectives

This analysis of evolving allied interests, objectives, and views of the unfolding competition produced several leading themes. First, even among U.S. allies, there is a complex mosaic of threat perceptions relative to the U.S.-nominated challenger states. Since the end of the Cold War, for example, France has supported engagement of Russia to bring it into the European security architecture rather than leave it alienated from Europe. Japan has far less concern for Russian political meddling and other issues. The divergences on China and Iran are even more stark: For example, the Macron administration in France has followed a consistent trend in French policy in taking a proactive attitude toward engaging China, with presidential visits and a public commitment to help lead Europe’s interaction with Beijing; also, the UK has formally declared a goal of being China’s leading strategic partner in Europe.

Second, key U.S. European allies are embroiled in domestic and regional socioeconomic challenges that obstruct their desire and ability to play a leading role in competitive dynamics. The chief example of this is the impact of Brexit on the UK. However, domestic politics also strongly affects Germany and France’s ability to take a leadership role on international issues.

Third, all U.S. allies—and many other major powers—continue to place a stable, rules-based international order at the center of their national security strategies. The UK remains firmly committed to the idea and practice of a Western-led liberal order and to playing a notable role in its preservation. France continues to emphasize the importance of the postwar international order as the basic framework for international politics; Australia places a large emphasis on multilateralism and a rules-based global order. Germany and Japan may count as the most-committed defenders and advocates of the postwar, rules-based order: Both have grounded their national security strategies in the success and stability of this order.

Fourth, for the most part, these countries continue to emphasize nonstate threats as equal to, or even still more important than, state competition as a national security concern. These include such issues as terrorism, climate change, migration, and social instability in neighboring regions. In its national strategy statements, for example, the UK has continued to emphasize nonstate threats (e.g., terrorism, migration, climate, disease). State competition took a clearly secondary position, although conversations in London and the 2021 Integrated Review suggest that official thinking is catching up to the U.S. emphasis on state competitors to some degree. France’s

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196 Australia Department of Foreign Affairs and Trade, “Iran,” webpage, undated-a.

position on this balance is edging closer to that of the United States: Its 2017 national security strategy refers to the “lasting deterioration of the international environment” and reflected more of a focus on rising great power threats than do recent counterpart documents in the UK or Germany, referring explicitly to the “return of military rivalry.”

Fifth, all these allies continue to emphasize their relations with the United States as a centerpiece of their national security strategies in a more-competitive era—but that commitment is wavering at the edges. This is dominantly true for Australia and Japan, each of whose recent strategy documents lays special emphasis on the U.S. relationship. The transatlantic special relationship remains a top priority, and British strategy and officials continue to see their role as a bridge between the United States and Europe as a major source of influence. France's most recent strategy commits it to closer cooperation with NATO in response to Russian aggression. But there is also more evidence of hedging and strong signals that U.S. allies are concerned that the current unpredictability in U.S. strategy and policy could worsen. France and Germany are planning greater emphasis on European defense cooperation. Australia is discussing the importance of self-sufficiency in defense production.

Sixth, many U.S. allies have a similar conception for enhanced influence: building networks of cooperative, like-minded status quo powers. France's recent strategy documents call for enhanced strategic partnerships with important developing nations and major powers in the Middle East, with India, Australia, Japan, Singapore, Indonesia, New Zealand, Malaysia, and Brazil. UK documents and thinking emphasize a response grounded in the UK's position as the hub of multiple networks—military, economic, cultural, commonwealth, and diaspora. Germany has stressed that relations outside the EU are of growing importance. Increasingly, developing networked power is a major focus of U.S. allies' diplomacy.
In addition to established U.S. allies, several emerging democracies also figure prominently on our list of major powers and are likely to play a significant role in shaping the emerging competition. In this analysis, we examined four: India, Brazil, Indonesia, and Mexico.

**India**

India is a status quo power with a burgeoning sense of its own regional and global importance, a self-conception that may be beginning to outstrip the reality of its international role and influence. In territorial terms, India’s ambitions are uncomplicatedly status quo: Although India has significant outstanding territorial disputes with Pakistan and China, it would be quite content to resolve these disputes based on territory each party currently holds (and has held, with very minor adjustments, since 1947 and 1962, respectively). In the realm of regional and global influence, however, India sees its rightful place in somewhat grander terms than its actual impact and commitment might warrant.

In India’s world view, it is only natural that a democratic nation encompassing one-sixth of humanity—expected to overtake China as the most populous country on earth in about six years¹—should enjoy a major global role. Indian strategists increasingly refer to the country’s size, rising economic clout, three millennia of culture, growing military heft, willingness to supply a sizable percentage of UN peacekeepers, and possession of a mature-yet-defensive nuclear arsenal to make the case that India already is (and by rights should be) one of the foundations of the global architecture. Indian policy shapers are aware, of course, that outsiders do not (yet) put New Delhi on par with Beijing or Moscow, or Washington, but they see this as a lagging indicator: India has been a global power for much of history and is destined to be one soon.

Yet India’s role in the emerging competition is also likely to lag—in terms of the vigor and decisiveness with which India’s power is placed in service of specific norms or objectives. In part, this is because India has no desire to get caught in a Sino-American standoff, and because its traditionally warm relations with Russia make it unlikely to join Western efforts to punish Russian misbehavior. Also, in part, its limited role is likely to stem from the intense pressures of domestic economic issues, which would limit the political capital, intellectual space, and financial resources for foreign policy. Most fundamentally, it will be a product of the continu-

ing influence of India’s most essential foreign policy doctrine of nonalignment. All of this means that India’s influence on the emerging competition, at least for the next decade if not beyond, is likely to be intermittent and modest.

Moreover, although India is very much a nation that shares key democratic and liberal values with the United States, it is critical to realize that this does not translate into easy agreement with U.S. perspectives on many national security issues, ranging from forcible value promotion to trade policy to nonproliferation. On some issues, such as the relative balance between sovereignty and value promotion, India is closer to China’s position than that of the United States. Yet India’s relationship with China changed drastically—at least for the short term—on June 15, 2020. After about six weeks of jockeying for position along the disputed Line of Actual Control separating the two nations in the Himalayas, Indian Army and People’s Liberation Army troops squared off in a battle near Galwan Valley. Twenty Indian troops and an unknown number of People’s Liberation Army soldiers were killed—by far the largest casualty count in any Sino-Indian conflict since 1967.

Goals, Principles, and Grand Strategy
India’s essential national security goals center on three priorities. The immediate goal is to defend India’s territory, citizens, and status against such threats as aggression from Pakistan and China, as well as from domestic separatism and insurgency and challenges to the nation’s prestige. The medium-term objective is to maintain the Indian Ocean region as India’s own special area of influence, especially against rising challenges from China. Lastly, in the longer term, India’s goal is to reestablish India’s prominence on the global stage, first as a nation on par with any and all others—and eventually (perhaps, in the distant future) as the world-leader that Hindu Nationalists feel is the nation’s rightful place. Whether India’s aspirations for a regional sphere of influence can be aligned with similar goals on the part of China remains to be seen, as does the specific means India chooses to pursue those goals.

To the extent that Indian strategy has a guiding principle, it would be noninterference. One think tank administrator said, “India’s big-picture goals are well spelled-out: We don’t interfere in the affairs of others, and we don’t want others to interfere in ours.” He paused for emphasis. “We just fundamentally don’t want to be interfered with.” This Westphalian mindset is shared by India and its greatest rival, China: Whatever separates the two largest nations on Earth, they remain fiercely committed to the shared goal of preventing anybody else from interfering in their own internal affairs. Neither fears that its value system (whether political or cultural) will be subverted or weakened by that of the other. Both see global competition in terms of interests more than ideologies.

India has no identifiable grand strategic doctrine. “There is no formal articulation of Grand Strategy,” said the think tank scholar-administrator. “I once asked [former Foreign Secretary] M. K. Rajgotra why the Indian government had never once published even a white paper laying out our doctrine, and he said, ‘Not having a strategy is also a strategy.’” Another scholar, currently focusing on portions of Kashmir under Pakistani administration, agreed:

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2 Interview with a scholar-administrator at a think tank established by the Indian Ministry of Defence, February 2018.

3 According to him, former RAND researcher George Tanham posed a similar question in the 1980s to defense theorist K. Subramanyam, whose response was “India does not want to have a strategy” (Interview with a scholar-administrator at a think tank established by the Ministry of Defence, February 2018).
“We want maximum flexibility. Having a Grand Strategy would reduce this.”\(^4\) This lack of a formal doctrine does not mean that India’s foreign policy is rudderless: Its two guiding principles are economic development and noninterference. “Our broad goal is to turn India into a developed country, and for that we need peace,” says the former Foreign Secretary as quoted by the scholar-administrator.\(^5\)

The overarching approach India has taken to further those goals is a powerful commitment to nonalignment. The closest thing India has to a grand strategy (at least prior to the 2020 uptick in confrontations with China) may be found in an unofficial paper entitled *Non-Alignment 2.0: A Foreign and Strategic Policy for India in the Twenty First Century*.\(^6\) This work, jointly authored by a team of scholars representing some of the most-influential streams in Indian strategic thinking, states, “The core objective of a strategic approach should be to give India maximum options in its relations with the outside world—that is, to enhance India’s strategic space and capacity for independent agency—which, in turn, will give it maximum options for its own internal development.”\(^7\) This formulation captures the two key elements of India’s approach to competition:

- **Nonalignment**: That is, India will not join any *de facto* or *de jure* alliance. Instead, it will treat decisions about strategic competition on an *ad hoc* basis. The centrality of this issue is clear from the work’s title. To what degree India can or will preserve this principle in the shadow of China’s rising assertiveness remains to be seen.
- **Economic development**: The guiding principle of India’s strategy should be to advance the nation’s economic interests. The authors state that the nation’s “principal challenge remains lifting millions of impoverished citizens out of poverty. This should remain the litmus test for policy. . . . India’s standing will be determined by how much it redeems this promise.”\(^8\)

Between 1947 (the nation’s founding) and 1998 (the start of the administration controlled by a Hindu Nationalist party described later in this chapter),\(^9\) Indian policymakers took a Nehruvian view of their country’s essential character as a global actor. In this conception, India’s culture combines tradition (ancient Hindu ideas of nonviolence, combined with a long history of generally peaceful coexistence among many ethnic and religious communities), neo-tradition (Mahatma Gandhi’s privileging of *ahimsa*—nonviolence—over conflict-

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\(^4\) Interview with a scholar currently focusing on portions of Kashmir under Pakistani administration, New Delhi, India, February 19, 2018. Another scholar working at a defense think tank agreed that “we don’t have a document laying out our strategy, and that’s a good thing: It gives us flexibility.”

\(^5\) Interview with a scholar-administrator at a think tank established by the Ministry of Defense, February 2018.


\(^7\) Khilnani et al., 2012, p. 8.

\(^8\) Khilnani et al., 2012, p. 69.

\(^9\) The Bharatiya Janata Party briefly took office in May 1996, but it fell from power after two weeks when it was unable to assemble a stable coalition. Its tenure in March 1998, under Prime Minister Atul Bihari Vajpayee, lasted more than six years. The term *Nehruvian* refers to the ideology of India’s founding Prime Minister Jawaharlal Nehru, whose ethos still guides the Indian Congress Party (which he led) and strongly influences most other Indian parties not associated with the Bharatiya Janata Party.
ing alternate strands of Hinduism), and modern ideals (Jawaharlal Nehru’s call for pan-Asian and pan–Third World unity). Adherents of this view regard India as a fundamentally peaceful state—a nation virtually incapable of acting in a hostile or aggressive way toward its neighbors. In policy terms, such a view serves as a brake on out-of-theater operations for the Indian military: If India’s strategy is definitionally one of nonaggression, there would be a strong aversion to assisting security partners in, for example, a potential South China Sea conflict.10

The Bharatiya Janata Party, which has governed the nation from 1998 to 2004 and from 2014 to the present, has a different view of India’s fundamental culture. Its ideology is Hindu-\textit{tva} (“Hindu-ness”), and it sees India as being a definitionally Hindu (rather than a multireligious, multiethnic) nation. In the Hindutva view, India was in ancient times the preeminent nation not only of the region, but of the whole world; it was cast down from its rightful place first by Muslim invaders, and subsequently by British colonialists. It is destined, however, to resume this rightful place in the future—as soon as is reasonably possible.

The policy implications of such a view are potentially more forward-leaning than those of a Nehruvian approach: a more-assertive stance against China’s intrusions into India’s “natural” sphere, as well as a more forceful stance toward any other nations in South Asia that might push back against Indian dominance. Also, such a cultural view might suggest an increased willingness to expand India’s sphere of action to a global stage, and the diplomatic and military assertiveness of Prime Minister Narendra Modi may be interpreted in this vein.11

However, India’s acceptance of the international order regarding territory does not translate to the diplomatic arena. At the UN, India is, at least structurally, a revisionist power: As the world’s soon-to-be most populous nation, it considers itself a natural claimant to a permanent seat on the UN Security Council (a position supported by the United States, the UK, France, and Russia—but steadfastly opposed by China). Likewise, India was a revisionist power regarding the Nonproliferation Treaty until the Civil Nuclear Deal: It considered the Nonproliferation Treaty a discriminatory structure and refused to sign. India is not a revisionist power across the board—but any global structure at which it is not treated as a top-tier power is regarded by India as illegitimate.

Like many other countries, India views challenges below the threshold of major war as a significant, even dominant, component of national security priorities. As one scholar suggested, “In the future, we’ll see more influence by nonmilitary means,”12 and India is dealing with a broad variety of Chinese economic, informational, and political coercion. Even military challenges, such as the 2017 confrontation over territorial claims on the Doklam Plateau and

10 For an in-depth examination of India’s strategic engagement with the ten nations of the Association of Southeast Asian Nations, including South China Sea implications, see Jonah Blank, Jennifer D. P. Moroney, Angel Rabasa, and Bonny Lin, \textit{Look East, Cross Black Waters: India’s Interest in Southeast Asia}, Santa Monica, Calif.: RAND Corporation, RR-1021-AF, 2015.

11 Examples of such assertiveness in the military sphere include a surgical strike against targets inside Pakistan on September 29, 2016, and the decision to use Indian troops to physically block Chinese road expansion in the disputed Doklam Plateau in summer 2017. On the diplomatic front, Modi has not only outdone any of his predecessors in the pace of his globetrotting, but he has broken past norms in his treatment of fellow national leaders: For example, when Canadian Prime Minister Justin Trudeau made a weeklong visit to India in February 2018, Modi expressed his displeasure over a political slight by not only declining to host his counterpart in his native state of Gujarat (as he had for Chinese President Xi Jinping in September 2014, Japanese Prime Minister Shinzo Abe in September 2017, and Israeli Prime Minister Benjamin Netanyahu in January 2018) but refusing even to meet with Trudeau when the Canadian leader was in New Delhi.

12 Interview with a scholar-administrator at a think-tank established by the Ministry of Defence, February 2018.
Emerging Democracies

the more-serious skirmish in June 2020 at Galwan, have largely taken place in the realm of gray zone or limited-conflict scenarios.

**Perceptions of Other Challengers**

India sees China as its greatest competitive threat—an expansionist power, with no natural limit to its possible expansion. And it sees its own neighborhood as one of China’s prime targets for expansion in the present day. But India—like most nations in Asia—has also viewed China as a vital trading partner. In 2020, total trade between the two nations reached $77.7 billion, making it India’s largest trading partner.13

Again, India’s relationship with China changed drastically after the 2020 skirmish near Galwan Valley. This bloodshed was even more noteworthy given the fact that discharge of firearms has been mutually banned along the Line of Actual Control for two decades: All of the deaths were inflicted by batons, stones, and other makeshift weapons. Both Beijing and New Delhi appear eager to avoid a full-scale war, but the episode demonstrates the volatility of this high-altitude battlefront.

The stage for Galwan may have been set three years earlier, in what was a three-month standoff in 2017 on the Doklam Plateau, territory claimed by Bhutan (a de facto Indian protectorate) and the People’s Republic. This showdown was sparked by an attempted land-grab by China, which deployed the South China Sea strategy of simply building infrastructure on disputed territory (in this case, a road expansion) and with the hope of creating a new set of facts. Prime Minister Modi immediately deployed Indian troops to block the People’s Liberation Army action and refused to back down. The crisis was ended through diplomacy, with a return to the status quo ante—and a quiet build-up of People’s Liberation Army assets in the area.


The U.S. policymakers tend to see Russia as a bad actor. India does not. Throughout the Cold War, the Soviet Union was India’s primary great-power patron, and, even in the post–Cold War era, Russia maintained a close friendship with India. On an ideological level, India is untroubled by Russia’s subversion of democratic norms: India is powerfully committed to the importance of sovereignty and does not feel a right to impose its values on others. Although Russia does not carry the same weight on the international stage that the Soviet Union did, it earns a lot of support in India simply by being seen as sticking by its longtime friend. “They’re on our side,” says the New Delhi-based security analyst.14 Russia is also an increasingly important counterpoint to China on the relative balance of hard power versus economic heft.

On the question of Iran, India is even less aligned with U.S. policy: From India’s standpoint, Iran is a historical friend and partner. Political and cultural ties between the two lands predate either country’s foundation as a modern nation-state by hundreds of years: Colonial and precolonial Indian polities, such as the Nawabate of Awadh and the Deccan Sultanates, were Shia-ruled kingdoms strongly influenced by the Iranian court of the Safavids. India’s Shia population numbers about 30 million, and there are many towns in India (including the strategic Kargil district of Kashmir) where it is quite common to see public portraits of Ayatol-

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13 Karthikeyan Sundaram and Archana Chaudhary, “China Back as Top India Trade Partner Even as Relations Sour,” Bloomberg, February 21, 2021. According to the U.S. Trade Representative, U.S.-India trade in 2019 was $146.1 billion, with services making up $54.1 billion of this (see Office of the United States Trade Representative, “India: U.S.-India Trade Facts,” webpage, last updated October 2, 2020).

14 Interview with New Delhi–based security analyst, February 2018.
lah Khomeini or his successors. In February 2018, former Iranian President Hassan Rouhani made a state visit to India—the first such visit by an Iranian leader since former President Mahmoud Ahmadinejad visited in 2003. Rouhani was greeted by India’s Modi with far greater warmth than most visitors, and the two leaders signed nine significant pacts.

In addition to history, economics, and geopolitics (Iran has an often-prickly relationship with Pakistan), India has another pressing reason to regard Iran as a friend rather than an enemy: Energy. India’s energy demand is enormous, and it sees few available sources for the fossil fuels it so desperately needs. India has been making overtures to Saudi Arabia in recent years, but its comfort level—and its level of multitiered engagement—with Iran remains far higher.

In India’s view, the greatest near-term security challenge is not a great power like China (which is seen as a long-term threat), Russia, or the United States, but a mid-level power willing to subvert international norms. India’s particular fear is of the mid-level power sitting just to its west: Pakistan. From a global perspective, however, India sees both Pakistan itself and the model that Pakistan represents as posing a uniquely dangerous security problem. Pakistan and China share a security relationship so deep that it is often referred to as an “all-weather friendship,” a fact that amplifies India’s concerns about both of its neighbors.

Relations with the United States

India’s warming relationship with the United States has broad support across the nation’s political spectrum. The thaw began during the tenure of Bharatiya Janata Party Prime Minister Vajpayee: In 2000, U.S. President Bill Clinton made the first visit to India by a sitting U.S. president in nearly a quarter-century, and hosted Vajpayee at a formal state dinner in Washington; in the following years, Vajpayee entered negotiations with Clinton’s successor, President George W. Bush, on the civil nuclear deal that would give India global acceptance as a nuclear weapons state. In 2004, the Congress Party supplanted the Bharatiya Janata Party, and Prime Minister Manmohan Singh maintained the course of engagement with the United States: In 2005, he signed the framework for the civil nuclear deal with Bush. Over the next nine years, he oversaw the various steps of formalization with Bush’s successor, President Barack Obama. When Modi brought the Bharatiya Janata Party back into power in 2014, he stepped up the pace of engagement—undertaking a record three summit meetings with a U.S. president under Obama’s tenure, and one summit with Obama’s successor, President Donald Trump.

Despite steadily warming ties with the United States, there remains a strong undercurrent of distrust about long-term U.S. motives and reliability. A large part of this stems from traditional Indian distaste for alliances: Despite rhetoric including a statement by Modi declaring

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15 The central market in the strategically vital Kashmir city of Kargil is called Khomeini Chowk. A massive poster with the Imam’s likeness towers over the bazaar.

16 In October 2017, India transported 15,000 tons of wheat to Afghanistan through the Iranian port of Chabahar. India has spent a reported $500 million in creating a viable port at Chabahar, and it regards this project as the centerpiece of its infrastructure response to China’s Belt and Road Initiative (see Dipanjan Roy Chaudhury, “India Sends First Wheat Shipment to Afghanistan via Chabahar Port,” Economic Times, October 30, 2017).

17 In this context, summit refers to stand-alone meetings between the two leaders, with one formally hosting the other. There have been other meetings between Indian prime ministers and U.S. presidents in multilateral settings, such as the UN General Assembly convocations held each September in New York.
the United States and India “natural allies,” there is very little chance that the two nations will enter any formal treaty-alliance at any point in the near future. Beyond that, however, India has deeper concerns about even basic partnership with the United States. Prior to Galwan, India had been highly reluctant to formalize a security arrangement that it thought China might perceive as threatening. Since Galwan, this reluctance has not dissipated.

The most immediate of these concerns is a long-standing belief that the United States has historically attempted to balance its relationships with both India and Pakistan—but, when forced to choose, has always sided with Pakistan (or at least refrained from providing India with the support it legitimately needed). Whereas many in Washington see India as a bulwark against China and a future security partner for U.S. competitive goals in the Indo-Pacific region, Indian policymakers do not share this vision. Some are apprehensive about alienating China—as noted above, one of India’s largest trading partners, and a militarily superior rival with which India has ongoing territorial disputes. Many, however, are equally apprehensive about the United States, feeling that they lack assurances that Washington will remain faithful to a long-term relationship. Indian officials believe Washington sacrificed Indian relations to cater to Pakistan and fear the same dynamic could emerge with China.

From India’s standpoint, any confrontation with China would serve U.S. interests far more than Indian ones. The South China Sea, the East China Sea, and the Korean peninsula are all rather distant; India has friends in each of these arenas but sees no vital interest in any of them. As for India’s own territorial disputes with China, Delhi feels able to handle these on its own, as it did at Galwan—and policymakers took notice of the Trump administration’s refusal to offer even tepid diplomatic support during 2017’s ten-week standoff with China on the Doklam Plateau. Even if Galwan has increased the desire for cooperation with the United States, India still sees self-reliance as a better guarantor of security than any type of alliance.

India is, however, committed to enhancing security relationships with other regional players, including Japan and Australia. In 2007, the Quadrilateral Security Dialogue (commonly referred to as “The Quad”) was initiated between these three nations and the United States; it fizzled out the following year, after all three non-U.S. participants stepped back for overlapping reasons (in all three cases, due at least in part to concern about blowback from China). In 2017, however, what is sometimes called “Quad 2.0” was initiated, and its salience has grown since. In June 2020, for example, India signed an agreement with Australia, under which each nation could use the other’s military bases for logistical support. Given India’s traditional reluctance to grant base access on anything other than an ad hoc basis, this represented a significant step.

**Summary**

India is a status quo power, an active participant in the postwar international order, a value-sharing democracy, and a country just as concerned as the United States about China’s goals in the Asia-Pacific and Indian Ocean regions. At the same time, it jealous guards its policy independence, has no desire to be recruited as a U.S. ally in a policy of containing China, is friendly with other U.S. rivals (Iran and Russia), is unwilling to join with the United States in coercive liberal value promotion, and is generally skeptical of the reliability of long-term U.S. commitments. India’s general influence on the emerging international era is likely to be positive, but there is a risk that the United States will want it to play a role for which it is temperamentally and strategically unsuited. If the United States is not careful, it could risk overplaying its hand and alienating the most important emerging democracy.
Brazil

Along with India, Brazil is one of the most significant emerging democracies in the world. No other country in the region comes close to possessing a similar dominance in size or global reach. Part of the BRICS (Brazil, Russia, India, China, and South Africa) association consisting of the five major emerging national economies, Brazil maintains strategic interests and bilateral technical cooperation with many developing nations around the world.¹⁸ It sustains official diplomatic embassies in 139 different countries and 53 additional consulate offices. In Africa alone, Brazil boasts 37 ambassadors, a reflection of its special and historical relationship with the continent, particularly in the southern and western regions.

Brazil is a prominent emerging democracy and, broadly speaking, also considers itself to be (and acts as) what would be most correctly termed a status quo power. Its identity and core strategic concepts are based on peaceful relations with neighbors, and it has been broadly supportive of the core elements of the postwar international order.¹⁹ The election of Jair Bolsonaro as Brazilian president in 2018 seemed for a time to place Brazil firmly on a path toward tighter competitive partnership with the United States. However, since that time, Bolsonaro’s attitude toward the U.S.-China competition, in particular, appears to have shifted somewhat.

Goals, Principles, and Grand Strategy

In 1961, Brazilian President Jânio Quadros announced in *Foreign Affairs* what would become Brazil’s evolving strategic leitmotif—that of its emergence onto the world stage as a more powerful and recognized strategic actor. Quadros wrote:

> The interest shown in the position of Brazil in international affairs is in itself proof of the presence of a new force on the world stage. . . . When I refer to a “new force,” I am not alluding to a military one, but to the fact that a nation, heretofore almost unknown, is prepared to bear on the play of world pressures the economic and human potential it represents, and the knowledge reaped from experience that we have a right to believe is of positive value.²⁰

More than a half century later, Brazil still seeks to tap into the potential that Quandros referred to and assume the “new force” role he envisioned. Since the early years of the 20th century, Brazil’s major foreign policy aspiration has been to achieve international recognition based on the belief that it should assume its “natural” role as a “big country” in world affairs.²¹ Such an aspiration is grounded in objective realities: Brazil is the largest and most important strategic actor in Latin America. Occupying roughly half of the South American continent,

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it spans 8.5 million square kilometers and has a population of more than 208 million. This makes the country respectively the fifth largest by size and the sixth most populous in the world. Brazil is also one of the world’s top ten economies when valued by the gross domestic product at purchasing power parity.

Valuing its independence and autonomy, Brazil embraces a strategic role commensurate with its size, but it also ties its national strategy of defense to its national strategy of development. Accordingly, Brazil historically defines its strategic objectives in a series of regional arcs. The most important is South America; the second-tier strategic priority is South and West Africa; the third includes the United States, Canada, the EU, Russia, China, and India. Mexico and Central America round out the list. Such rank-ordering is indicative of how Brazil strategically positions and sees itself vis-à-vis the rest of the world; it takes a fully multilateral view of its interests and is not permanently tied or beholden to any major power.

Although it has little recent experience with war, Brazil still maintains the largest military in Latin America, with a budget greater than those of Mexico, Colombia, Peru, and Venezuela combined. However, given the absence of an immediate threat, the Brazilian military also struggles to define its key mission at times because this aspect continuously vacillates between domestic and public security missions and international peacekeeping operations. Official statements of national security priorities tend to include a variety of issues, from terrorism to technological dependency, transnational organized crime, and domestic instability. Like many national security priorities of emerging democracies, Brazil’s national security focus tends to look primarily inward: From a threat perspective, domestic security tends to dominate the Brazilian agenda.

Notwithstanding such a large and capable military, by both tradition and conviction, Brazil maintains a long-standing tradition of nonintervention into the international affairs of other countries. It considers its broadly pacifist and nonaligned approach to foreign policy to be a valuable part of its national identity. Yet Brazil has the national ambition to rank among the leading world powers; it sees a global order in flux as the United States’ unipolar moment recedes and also an opportunity to eventually take its place as a first-tier power. It seeks to do so, not in a disruptive manner, but primarily via economic development and institutional participation. As has been noted, Brazil does not aim to upend the global power table; it wants a seat at that table. Prizing its sovereignty and autonomy, Brazil is intent to shape the global strategic order moving forward by become a rule-maker rather than a rule-follower.

The advent of a multipolar order also carries risks. Brazilian leaders remain wary that an international system in flux is insufficient to guarantee peaceful relations between states. In

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22 For a historical overview of Brazil’s foreign policy, see Tullo Vigevani and Gabriel Cepaluni, Brazilian Foreign Policy in Changing Times: The Quest for Autonomy from Sarney to Lula, Plymouth, United Kingdom: Lexington Books, 2012.

23 According to the 2012 Brazilian defense strategy, “Brazil—a developing country—shall rise to the first stage in the world neither promoting hegemony nor domination. The Brazilian people are not willing to exert their power on other nations. They want Brazil to grow without reigning upon others” (see Ministry of Defense of Brazil, National Strategy of Defense, Brasilia, 2008, p. 8).


this context, Brazil seeks a more-engaging role in shaping the emerging international order, but one in favor of historical norms of international law.

In the absence of a serious military threat to Brazilian national security, the armed forces are constantly in search of a central or unifying mission—one that goes beyond public security and domestic efforts. In the past, they have contributed to UN peacekeeping missions. For instance, Brazilian peacekeeping forces participated in operations in Haiti for 13 years. They have also participated in international operations in Congo and Lebanon. Brazil ranks in the top 20 global peacekeeping providers, having participated in no less than 16 peacekeeping operations since 2000. A senior U.S. State Department official in the Brazilian embassy noted that Brazilian participation in peacekeeping, particularly in Africa, is an area of strategic global engagement that the country seeks to expand in the future. In line with this broader strategic guidance, the Brazilian armed forces articulated a set of long-term goals in its “Brazil 2022 Plan.”

Not unlike Mexico, Brazil’s ability and latitude to drive international posture is constrained by domestic travails, especially domestic violence and political corruption. It would be difficult to overstate the impact the current scandal continues to have on Brazilian politics, both domestic and international. Although Brazil sees strategic opportunity in advancing regional cooperation and international peace operations, its inability to extract itself from internal malaise in the form of political corruption and domestic violence will constrain and distract from Brazil’s ambitious strategic vision. Brazil has a strategy: expand and strengthen the military, develop economically, and increase its multilateral and institutional engagements overseas. Ironically, its internal affairs currently impose the biggest impediment to strategic success.

Bolsonaro’s administration has not radically altered Brazil’s basic orientation in foreign policy. He and his administration have taken a bitterly critical attitude to globalization as part of a general focus on cultural values.

View of Other Challengers
As a strategic actor, Brazil does not have strongly established views of the leading actors in the emerging strategic competition.

Brazil’s relationship with China is predicated on trade and investment. In 2009, China overtook the United States as Brazil’s largest trading partner, and the economic relationship has only deepened since then between the two BRICS nations. Chinese investment in Brazil reached $25 billion in 2017, in part fueled by Brazil’s inclusion in the Belt and Road Initiative. Most of the Chinese investment in Brazil goes to infrastructure that facilitates the transport of exports to China; Brazil’s economy is so dependent on the export of commodities to

26 Mazarr et al., 2017, p. 115.
28 As one source put it, “from the United Nations to Greenpeace, from Leonardo DiCaprio to Greta Thunberg, Bolsonaro’s Brazil wishes to break off with any institution, ideology or value that might threaten what is perceived as the true conservative nature of the Brazilian people” (see Guilherme Casarões, “Making Sense of Bolsonaro’s Foreign Policy at Year One,” America’s Quarterly, December 20, 2019).
29 Malcom Moore, “China Overtakes the U.S. as Brazil’s Largest Trading Partner,” The Telegraph, May 9, 2009.
30 David Biller, “China Expands Brazil Frontier as Investment Grows During Crisis,” Bloomberg, April 24, 2018.
China that periods of slower growth in China lead to downturns in the Brazilian economy.\(^{31}\) Although Brazil has decried protectionism, the nation actually stands to benefit from the U.S.-China tariffs because China might look to Brazil to replace U.S. soybeans and ethanol.\(^{32}\)

There is little political cooperation between Brazil and China outside economic matters. The two nations have a joint satellite venture, but geographic distance represses the importance of the bilateral relationship.\(^{33}\) Despite the economic closeness, however, Brazil has not shied away from criticizing Chinese currency practices in the past.\(^{34}\)

It appeared at first that the Bolsonaro administration might confront China much more openly on issues of trade fairness and interference in Latin American politics. This led some in the United States to hope that Brazil would become a strong ally in an intensifying strategic competition with China. Over time, however, the Bolsonaro administration has significantly backed off the intensity of its criticism, seemingly driven by the importance of the trade relationship and the potential for increasing Chinese investment (and by strong Chinese coercive signals).\(^{35}\) Brazil’s public stance has softened, and it has engaged China in a variety of international forums, such as a 2019 BRICS summit held in Brasilia. China remains the largest source of inbound foreign direct investment in Brazil, and the country decided in January 2021 not to bar Huawei 5G technology in its information systems, at least for the time being.

These policy debates have left a legacy of skepticism toward China, after a series of disputes and tensions that have made clear that Brazil must be cautious about the degree of influence it allows China to acquire.\(^{36}\) As of late 2020, however, China-Brazil economic relations are strengthening. As one expert concluded,

> During the Trump presidency, China has grown more influential and more powerful in Latin America in virtually every dimension. Brazil is perhaps the most remarkable example: Despite Bolsonaro’s anti-China rhetoric and his efforts to strengthen ties to Washington, Brazil’s trade with the United States has fallen to its lowest level in 11 years, while trade with China is booming. Fully 34 percent of Brazilian exports go to China, and China’s relatively quick economic recovery from the coronavirus pandemic will likely lead that figure to grow.\(^{37}\)

The Russian-Brazilian relationship is characterized by economic ties and political understanding. As with China, Brazil engages with Russia through BRICS forums and summits. Total trade between the nations reached $4.3 billion in 2017, and Brazil is an extremely


\(^{35}\) Ryan C. Berg and Thiago de Araújo, “Biden or Trump, the U.S.-Brazil Relationship Is Still Headed for Trouble,” Foreign Policy, September 21, 2020.


\(^{37}\) Oliver Stuenkel, “Trump Drove Latin America into China’s Arms,” Foreign Affairs, November 13, 2020b.
important trade partner for Russia because it has not joined in Western sanctions against that nation.\textsuperscript{38} Brazil has generally maintained neutrality in the disputes between Russia and the West, refusing to condemn Russia after the annexation of Crimea or the Skripal poisonings.\textsuperscript{39} Russian leaders see Brazil as an important partner; Putin stated during a 2015 visit to Brazil, “Russia and Brazil share common approaches to key global challenges.”\textsuperscript{40} Russia supports Brazil’s bid to join the Security Council as a permanent member and has sold air defense equipment to the Brazilian military.\textsuperscript{41}

Brazil’s relations with Iran are largely based on economic cooperation after the implementation of the Joint Comprehensive Plan of Action. Relations between the nations had traditionally been friendly; in 2010, Brazil helped to negotiate a nuclear deal with Iran and Turkey that sent Iranian uranium to Turkey for storage.\textsuperscript{42} However, relations had already cooled decidedly after the 2011 election of Dilma Rousseff as president of Brazil. Rousseff strongly condemned Iran for human rights violations, specifically calling the practice of stoning criminals “medieval behavior.”\textsuperscript{43} The relationship was further damaged by a 2012 incident in which an Iranian diplomat stationed in Brazil was accused of fondling several underage girls at a Brasilia swimming pool. The incident was important enough to draw immediate condemnation from Brazil’s foreign minister and added to tensions between the countries.\textsuperscript{44} After some hints that the Brazil-Iran relationship might be improving, President Bolsonaro returned to a strong stand against international terrorism that renewed a tough approach to Iran, including seeming praise for the U.S. strike that killed Iranian Qods force commander Qasim Soleimani.\textsuperscript{45}

Relations with the United States

Brazil’s relationship with the United States has historically been mixed, dealing with the legacy of sometimes overbearing U.S. policy toward the Americas. Over the past two decades, the two countries have occasionally clashed over issues ranging from the Iranian nuclear program to policy toward Colombia and Honduras to the controversy over U.S. intelligence directed at Brazilian officials to the content of free trade proposals.\textsuperscript{46} Brazil prizes its policy independence and has avoided seeking any sort of formalized special relationship with the United States.

\textsuperscript{38} Presidency of the Republic of Brazil, “Brazil-Russia Trade Reaches USD 4.3 Billion a Year,” BrazilGovNews, blog post, June 17, 2017a; “BRICS Stand Against Western Sanctions: Russian Foreign Minister,” Reuters, July 15, 2014.

\textsuperscript{39} Oliver Stuenkel, “As Tensions Mount, Brazil Hedges Its Bets on Russia and the West,” \textit{America’s Quarterly}, April 5, 2018.

\textsuperscript{40} Alexei Baliev, “Russia-Brazil: Strategic Partnership Is Expanding,” Strategic Culture Foundation, September 22, 2015.


\textsuperscript{43} Eduardo J. Gomez, “Why Iran-Brazil Friendship Has Gone Cold,” CNN, April 5, 2012.


\textsuperscript{45} Casarões, 2019.

“U.S.-Brazilian ties have never lived up to expectations,” one analysis concludes, “and the disappointments reverberate across the hemisphere.”

Like many other developing nations, Brazil has traditionally pursued an autonomous policy that has not always fallen in line with U.S. policy preferences. In addition, like many such countries, a continuing theme of Brazil’s foreign policy—and its relations with the United States—is the demand for a “rightful place” in world politics attendant to Brazil’s size and influence.

More broadly, as an expert on Brazilian politics has noted, Brazilian foreign policy doctrine holds that the diffusion of power from the United States and Europe toward the global South is both inevitable and desirable. This shift in power is reflective of former President Rousseff’s introductory “Message from the President of the Republic” in Brazil’s 2012 national defense strategy: “The rise of Brazil’s international status in the XXI century is already a reality. A fully developed country with increasing external presence will require a proper dissuasive military capacity. Committed to building a more peaceful and prosperous global order, Brazil cannot neglect Defense.”

The Bolsonaro administration initially indicated a strong desire to improve U.S. relations, and bilateral collaboration has progressed in many areas. This effort has included closer coordination on countries viewed as regional threats, notably Cuba and Venezuela, expanded counterterrorism coordination, and a series of agreements in 2019 (e.g., a technology safeguards accord, satellite launch agreements, and, most notably, the designation of Brazil as a major non-NATO ally). The United States has supported Brazil’s bid to join the Organisation for Economic Co-operation and Development and promoted U.S. investment via the newly established U.S. International Development Finance Corporation.

At times, however, Bolsonaro’s desire to stand firmly with the United States has run up against traditional Brazilian instincts to remain more nonaligned, and some of his plans to join U.S. policies—for example, withdrawing from the Paris climate agreement or hints about welcoming U.S. military deployments—have had to be reversed. After the initial signals of closer alignment, relations with the United States may be gradually returning to a more typical, independent posture. The larger trend in the region has been growing frustration with U.S. policy, and a post-Bolsonaro administration in Brazil could reflect these attitudes.

**Summary**

Brazil, like India, is a value-sharing democracy that has had a stabilizing influence on the post-war order and largely supports U.S. goals for a peaceful international system characterized by an open trading system. Yet like India, it demands autonomy and increasingly seems likely to

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chart a course somewhat independent from what the United States dictates. It does not support forcible value promotion and its concern over Russian and Iranian aggression is limited. Brazil has begun to pay more attention to Chinese economic statecraft and other forms of Chinese power, but its level of concern remains far below that of the United States, and the tentative signals of a tougher attitude toward China have now been significantly walked back. Like many emerging countries, Brazil is generally supportive of U.S. goals. However, notwithstanding a short period of more-competitive rhetoric from the current Bolsonaro administration, Brazil has traditionally had little desire to be recruited into an anti-China or anti-Russia coalition, and it is likely to take increasingly strong steps to make clear its preference for a more-multilateral order.

**Indonesia**

Indonesia is the world’s fourth most populous nation, the largest archipelago, the third-largest democracy, one of the eight largest economies when measured by purchasing power parity, and the nation with the largest Muslim population. In the past half century, Indonesia’s economic performance has been among the best in Asia, and its economy has proved more resilient to shocks than those of many of its neighbors.

Indonesia has been unwilling to project power internationally, however, because it has been well served by the current regional and global order and has seen no reason to make any fundamental change to the status quo. Although it has engaged in confrontation with Malaysia in the 1960s and annexed the Portuguese colony of East Timor in 1975, Indonesia has not overtly sought to undermine or change the Western-led international system in any coercive or destabilizing way. Its geographic location, together with its low profile and pragmatic foreign policy, has minimized frictions with both its neighbors and its major trading partners. The country’s geography makes land invasion unlikely, and Indonesia’s few disputes over maritime borders have been settled peacefully, with the potential exception of a small, overlapping area of maritime space with China.

Overall, Indonesia is largely content with the global system and does not seek to upset the current international order, but rather seeks to profit from peace and stability in the Asia-Pacific region. Therefore, Indonesia can be appropriately described as a “status quo” power: Not only is Indonesia a member of all the major global and regional security and economic forums—including the UN, the World Trade Organization, the International Monetary Fund, the World Bank, and the Association of Southeast Asian Nations, among others, it remains an active participant and generally satisfied with the world order in its current incarnation. It does not violate any norms of behavior as established by international security, economic, and legal institutions. Although Indonesia does not fully agree with the United States on freedom of navigation issues under the UN Convention on the Law of the Sea it does not challenge the

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53 In 2002, East Timor gained its independence from Indonesia as the nation of Timor Leste.

fundamental nature of the international system. Its views on regional rules and norms do not place Indonesia in a category that might be considered “dissatisfied” with the global order.55

Indonesia does, however, struggle with normative assessments of human rights, freedom of the press, and health of the democratic system, which some Western nongovernmental organizations have highlighted as an issue of concern.56 For example, Indonesia has failed to ratify the accession statute to the International Criminal Court.57

**Goals, Principles, and Strategies**

After gaining independence in 1945, Indonesia established a foreign policy identity known as “free and active” (bebas aktif), promulgated by Mohammad Hatta, Indonesia’s first vice president. Hatta’s conception of bebas aktif entailed protecting Indonesian national interests by not aligning with major world powers (i.e., the Soviet Union and the United States) and championing the nonaligned movement, specifically with India and countries in Latin America and Africa. Specifically, this meant “no alignment, no neutrality and no third bloc and playing favorites.”58 Such a strategy would bring it international respect, noninterference in its international affairs, and economic benefit by remaining open to all forms of trade and investment.

Starting in the mid-1950s, Indonesia became one of the leading members of the nonaligned movement in Asia, which grew out of the group’s founding conference hosted by Indonesia in Bandung in 1955.59 Managing great-power relations has always been Indonesia’s principal concern since independence, and has driven the creation of an identity that is neutral, conservative, and that seeks to maintain equilibrium with all powers in the region.60 This minimalist approach is based primarily on existential vulnerability and distrust toward outside powers, as well as an interest in focusing inward to combat insurgency groups and threats from terrorism, and to build strong and resilient civil society and democratic institutions.

As a result of the bebas aktif approach, Indonesia has maintained an unwavering position of no alliances or defense pacts, in contrast to the stark divisions of ideological camps that were forming during the Cold War and such military alliances as the Southeast Asia Collective Defense Treaty. The bebas aktif approach is also sufficiently broad as to accommodate adjustment and interpretations of foreign policy actions.61

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57 Margareth S. Aritonang, “Govt Officially Rejects Rome Statute,” *Jakarta Post*, May 21, 2013. Note that the United States also has not ratified the statute.


Other key foreign policy documents that serve as anchors for Indonesia’s view of the international order are its defense white papers. Three have been published—in 2003, 2008, and 2015—and they offer a window into national security objectives, threats, and perceptions of the international order. A close examination of these documents reveals a subtle but important shift in threat perception over time. For example, the 2003 white paper emphasizes nontraditional and domestic threats to Indonesian national security over external threats, which it defines as “any action that threatens the sovereignty of the country, unity of the region, and safety of the nation.”62 These include radical and terrorist groups, drugs and illicit trade, and poverty.63 The 2015 white paper, by contrast, first highlights the rise of traditional security concerns and risk factors, such as the South China Sea and the Korean Peninsula, before highlighting nontraditional security concerns.64 On assessment of trends in contemporary conflict, the 2015 white paper presents the following:

Currently, the armed conflict pattern is undergoing significant changes and affects the influences of the general trend of contemporary conflict in the world. Military technology development, the desire to reduce casualties, high cost of war and the increasingly strict application of the rules of international laws and conventions are decreasing large-scale armed conflict. Patterns that occupy this space are no longer executed frontally but are executed by means of nonlinear, indirect, and through proxy wars. Trends that occupy a country using asymmetric “weapons” built systematically including the Syrian conflict and Ukraine war are increasing. These methods utilize propaganda, information technology advances and social media.65

The latter type threats are assessed as “unlikely to affect Indonesia,” but, the document warns, “alertness must be maintained because of dynamic threats, which have the potential to become ‘factual,’ when the national interest and honor is disturbed.”66

At the beginning of 21st century, new slogans to replace the *bebas aktif* strategy have emerged. In President Susilo Bambang Yudhoyono’s first foreign policy speech (which he delivered to the Indonesian Council on World Affairs in 2005), he promoted an idea that Indonesia needed to move beyond its traditional “free and active” foreign policy and adopt a “constructive approach” to engage regional and global actors and function as a peacemaker, confidence builder, problem-solver, and bridge builder.67 Regionally, Yudhoyono proposed the idea of a “dynamic equilibrium” to replace the traditional “balance of power” concept. Under a dynamic equilibrium, Association of Southeast Asian Nations countries would work with others to build mechanisms—including the East Asia Summit, the Association of Southeast Asian Nations Defense Ministers’ Meeting Plus, and perhaps even an Indo-Pacific treaty of

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63 Defence Ministry of the Republic of Indonesia, 2013, p. 36.
65 Defence Ministry of the Republic of Indonesia, 2015, p. 11.
friendship and cooperation—where no power is dominant or excluded, and all parties are part of a web of mutually beneficial relationships that leads them to work toward common security despite trust deficits and differences. In 2014, newly elected Indonesian President Joko Widodo unveiled his Global Maritime Fulcrum vision to the world that sought to reconceptualize Indonesian foreign policy toward the maritime domain and reinvigorate its maritime economy to match its status as the largest archipelago in the world.

Periodic debates on revising the bebas aktif policy have not amounted to a wholesale reform of the fundamental foreign policy orientation of the country. Rather, they express a desire to emphasize the “active” part of the “free and active” conception by pursuing greater engagement with countries around the world and enhancing participation in multilateral forums.

The 2015 Indonesian defense white paper offers another window into Indonesia’s strategy for navigating the international environment. The document expresses the overall goal of the Indonesian national security strategy as “achieving a sovereign and independent nation with a strong character based on mutual cooperation.” Seven “missions” are highlighted as the mode through which Indonesia can actualize this strategy—broad aspirational goals that include preserving territorial sovereignty, “achieving a developed, balanced and democratic society,” economic development, and “becoming an advanced and powerful nation.” The 2015 white paper specifically emphasizes defense cooperation as an area of focus for achieving national security goals.

**View of Other Challengers**

As Southeast Asia’s largest state, Indonesia has traditionally defined its interests broadly, to include not only its national security, prosperity, and social cohesion but also an autonomous regional order free from the great-power intervention that forced local states to choose sides during the Cold War. To promote this regional order, Indonesia helped create the Association of Southeast Asian Nations in 1967 and historically has taken a key leadership role in the organization. Throughout the 20th century, Indonesia viewed its primary security threats as internal and did not seek hegemony or a hard power presence to protect its interests. As a result, it relied primarily on soft power and multilateral mechanisms, such as the regional architecture built on the Association of Southeast Asian Nations, to engage great powers rather than investing in hard power hedging.

Indonesia still employs this strategy today to manage relations with the key players with which it engages in foreign policy—specifically, the United States, China, and the countries in the Association of Southeast Asian Nations. Of those three, China remains its only viable threat. China’s use of military force to assert its claims in the South China Sea indirectly threaten Indonesia’s security, and rising Sino-American tensions threaten the autonomous order Jakarta has worked hard to secure. More critically, China refuses to respect Indonesia’s Natuna Islands’ Exclusive Economic Zone, and China periodically challenges Indonesian sov-


70 Defence Ministry of the Republic of Indonesia, 2015, p. 38.

By far the biggest concern is the presence of Chinese fishing militias and coast guard vessels within Indonesia’s Exclusive Economic Zone north of Natuna Island, which threatens Indonesia’s ability to protect its marine resources. China’s actions and promulgation of a concept of “traditional fishing grounds” were not only seen as a violation of Indonesian sovereignty but also an attempt to weaken the UN Convention on the Law of the Sea, the maintenance of which is a key Indonesian interest.

Indonesia also harbors concern about Chinese efforts to sow division within the Association of Southeast Asian Nations, which undermines the cohesiveness of the regional group and Indonesia’s leadership position within it. The Association of Southeast Asian Nations is central to Indonesian foreign policy, and thus changes to the unity of the group are felt strongly by Indonesia. As the security environment in the region is home to many flashpoints and exacerbated by increasing the U.S.–China rivalry, Indonesia is concerned with maintaining the strategic autonomy of the Association of Southeast Asian Nations, which Jakarta has long viewed as a prerequisite for regional autonomy. Indonesia worries that Association of Southeast Asian Nations members will lean toward Washington or Beijing, and prioritize the interests of their great-power allies over their Association of Southeast Asian Nations partners.

Despite China’s growing assertiveness in the South China Sea and growing Sino-Indonesian tension over the Natuna waters, Indonesia has not officially identified China as a security threat. In its 2015 defense white paper, Indonesia describes China as a “strategic partner” (mitra strategis)—the only nation other than the United States to which it gives this designation. On the economic front, the Chinese trade presence is only increasing, bring-

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73 In recent years, these militia units have caused skirmishes with Indonesia government and naval vessels in a small maritime area overlapping with China’s nine dash line. China asserts that this area is part of its “traditional fishing grounds,” which the Indonesian Foreign Ministry has criticized as having no basis under international law (see “Natuna Islands: Indonesia Says No ‘Overlapping’ South China Sea Claims with China,” ABC News, June 22, 2016). Two incursions by China in 2016 have illustrated both Beijing’s capacity and intent to threaten Indonesian interests. On March 19, 2016, the Indonesian fisheries authorities captured the Chinese fishing boat Kway Fey as it entered the Natuna Island Exclusive Economic Zone. It was captured by the Indonesian fisheries authorities, but when the boat was being pulled in toward the Natuna Islands, a Chinese maritime law enforcement vessel physically intervened to free the arrested Chinese fishing boat. The Chinese boat was taken back to China, but eight Chinese crew members were detained by the Indonesian authorities. China’s foreign ministry’s spokesperson protested Indonesia’s detention of these fishermen. Beijing claimed that the boat had been “in Chinese traditional fishing grounds” doing “regular activities,” and demanded the release of the crew members (see Haeril Halim, Anggi M. Lubis, and Stefani Ribka, “RI Confronts China on Fishing,” Jakarta Post, March 21, 2016).

74 A second incident occurred on June 17, 2016. In this incident, the Indonesian navy ship KRI Imam Bonjol-383 was in another standoff with the Chinese coast guard after capturing an illegal Chinese fishing trawler, the Han Tan Cou 19038, together with its seven crew members. The Chinese coast guard demanded that the Indonesian navy release the detained vessel and its crew. The Indonesian navy rejected this demand. China responded by filing a diplomatic note protesting Indonesia’s action. Indonesia did not reply to China’s protest through formal channels (see Francis Chan, “Another Chinese Fishing Boat Detained in Indonesia’s Waters in South China Sea: Official,” Straits Times, June 19, 2016).

75 This is precisely what happened in the disagreement over the Association of Southeast Asian Nations’s 2012 Chairman’s statement when Cambodia prioritized its relationship with China over its Association of Southeast Asian Nations partners, which resulted in the failure to issue a joint statement for the first time in the history of Association of Southeast Asian Nations. See Ernest Z. Bower, “China Reveals Its Hand on ASEAN in Phnom Penh,” Center for Strategic and International Studies, July 20, 2012.

76 Kementerian Pertahanan, Buku Putih Pertahanan Indonesia 2015, Jakarta, Indonesia, November 2015; Defence Ministry of the Republic of Indonesia, 2015.
ing Jakarta into Beijing’s financial orbit. Thus, Indonesia must continue to strike a balance between soft balancing Chinese hard power in the South China Sea while promoting a positive, win-win economic relationship.

**Relations with the United States**

Indonesia’s dramatic swings in its relationship with China were mirrored in equally dramatic shifts in Jakarta’s ties with the United States. Sukarno’s staunch anti-Western nationalism and close ties of the Indonesian Communist Party with China meant that Indonesian relations with the United States were almost at a breaking point at the end of the Sukarno era in the 1950s and 1960s.\(^7^7\) In contrast, a commitment to anticommunism led Indonesia under Sukarno’s successor Suharto (like many Indonesians, both officials used only one name) to develop close military, economic, and political ties with the United States. As Indonesia began to reengage China at the end of the Cold War, its close security ties with Washington began to unravel: The United States, under human rights legislation passed in 1998, cut off most forms of security assistance because the nascent democracy proved slow to address abuses during the years of Suharto’s military rule.\(^7^8\)

The early years of the 21st century laid a foundation for eventual warming of relations but only on a gradual basis. The transition from military dictatorship to democracy provided a more-solid basis of cooperation than Cold War transactionalism, but Indonesia’s tardiness in honoring an international call for the independence of Timor Leste soured the reputation of the post-Suharto regime. For its part, Indonesia saw the U.S. invasions of Muslim-majority Iraq and Afghanistan as an affront, and the post-9/11 War on Terror campaign as an overly broad attack on Muslims throughout the world. In partial reaction, the Indonesia-based al Qaeda–affiliate Jemaah Islamiyah carried out a series of high-profile domestic attacks on Western targets in the early 2000s.

By 2004, however, the countries were on a more harmonious path. After three presidents in the prior six years, Yudhoyono ushered in a decade of stable and steadily democratizing governance. Indonesia had recovered economically from the Asian financial crisis of the late 1990s, and the specter of domestic terrorism had largely ebbed. Indonesian ties with both the United States and China improved because domestic stability enabled the Yudhoyono administration to focus on foreign policy.

Since then, ties between the United States and Indonesia have warmed significantly, starting in 2010 with the creation of a comprehensive partnership that enhanced high-level engagement on democracy and civil society, education, security, climate, maritime, energy, and trade issues, among others.\(^7^9\) The bilateral relationship was upgraded further in 2015 (after Indonesia’s successful transition from one full-term democratically elected president to another) when Indonesian President Widodo and U.S. President Obama agreed to a strategic partnership extending cooperation to issues of regional and global significance.\(^8^0\) Going forward, it is

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expected that Indonesia will seek closer economic and security ties with the United States to
offset concerns and distrust over China's long-term intentions. Aggressive actions by China, for
example, including infringement on Indonesia's Exclusive Economic Zone around the Natuna
Islands, may provide Jakarta with an incentive for renewed cooperation.

Because of Indonesia's nonaligned policy, however, the nation will go to great lengths to
avoid any overt tilt that might damage its economic and diplomatic relationship with China.
The narrative of parity with other great powers gained prominence when Indonesia signed
“Strategic Partnerships” with both China and India in 2005—before even launching pre-
liminary discussions with the United States in 2007. The idea of great-power parity received
another impetus on July 15, 2015, when a prominent Indonesian official and public intel-
lectual called for the establishment of an “Asian Fulcrum of Four” involving China, India,
Indonesia, and Japan. He argued, “There is a need for four Asian powers to sit together and
find a mechanism through which they can cooperate to shape the future of regional order.”
Indonesia’s former president, Abdurrahman Wahid, had proposed an Asian coalition of five
powers comprising China, India, Indonesia, Japan, and Singapore as early as 2000. One of the
objectives of the proposal was to elevate Indonesia’s own international status in the pan-Asian
order of powers.

In sum, the objective of great-power parity has led Indonesia to build multiple alignments
with great powers without one relationship exerting excessive costs on other relationships. Pro-
jecting an image as a nonaligned, equal opportunity power broker in the center of Southeast
Asia is paramount for Indonesian policymakers to maintain peace and stability in the region.

Summary

To survive and compete in the international system, Indonesia has steadfastly adhered to its
bebas aktif foreign policy while determining how to balance its security relations with the four
major actors of consequence for Indonesia national security: (1) the United States, (2) Russia
(and the former Soviet Union), (3) China, and (4) the Association of Southeast Asian Nations.
Although not allies, Indonesia and the United States are constructive security partners. They
cooperate extensively, particularly in military training and assistance, and in all likelihood,
will increase cooperation in the future as China's power and influence grows. Indonesia sees
cooporation with the United States as compatible with a mutually beneficial security relation-
ship with China, yet distrusts Chinese long-term intentions. Recent Chinese behavior in the
South China Sea and within the Association of Southeast Asian Nations has only added to
Indonesian concerns over Chinese intentions in the region.

That said, Indonesia would also look for advantages and opportunities to help lessen
U.S.-China rivalry and other regional tensions, including by seeking opportunities to play
a constructive role in the peaceful resolution of South China Sea disputes or other regional

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82 Sukma, 2015.
83 Such sentiment was highlighted by a high-level Indonesian official, who surmised, “Indonesia is big enough to not be
forced to take sides even among powerful nations. As an emergent Asian middle power, Indonesia must preserve its diplo-
matic freedom of action. Slipping into any exclusive sphere of influence, whether of the US or of China, would destroy the
leverage that Indonesia possesses in its relations with both world powers. There is nothing special about Indonesia’s position.
This is how middle powers much behave if they are to be middle powers” (see Luhut B. Pandjaitan, “How Indonesia Could
Be a Bridge Between China and the U.S. in Asia,” South China Morning Post, April 9, 2017).
defense and security issues. Indonesia sees international conflict as being primarily over great-power competition and wishes to decrease the risk of such conflict throughout the Indo-Pacific region.

**Mexico**

Mexico is a rising regional power in Latin America. Its global ambitions are largely regional, and the country has expanded its regional engagements in the past decade. Although it has aspirations to grow into a more influential and forward-leaning power broker, the country is beset with domestic issues that limit its ability to craft and execute a larger strategic role in the region. These factors include a security problem related to its many drug cartels, general levels of societal violence, governance issues, and the priority of domestic reforms in education, energy, and the judiciary, all of which complicate and distract from Mexico’s ability to focus outward. Although Mexico envisions a broader role for itself, especially in Central America, this may be difficult to effect while domestic travails dominate the public discourse in Mexico.

Based on purchasing power parity of gross domestic product, the World Bank ranked Mexico in 2017 as the 11th richest country—ahead of Spain, Canada, South Korea, Australia, Pakistan, Turkey, and Saudi Arabia.\(^8^4\) As a wealthier country in the region, Mexico faces its own challenge in dealing with immigration. The country is a popular destination for immigrants from Central America. And the United States’ immigration problem is also Mexico’s headache: In the past few years, more people entering the United States illegally have come from Central American countries than from Mexico.\(^8^5\) Traditionally, the country has sought a role as an economic and military power commensurate with its economic heft.\(^8^6\)

With the inauguration of President Andrés Manuel López Obrador (commonly referred to by his initials AMLO) in December 2018, Mexican politics took a populist turn, with López Obrador describing global neoliberal norms as a “disaster” and calling for policies that help Mexican poor and working-class citizens. This posture has made López Obrador more intent on pushing Mexico’s own economic interests in its relationship with the United States, but he has not had strong historical foreign policy views. In response to some accusations that he would become a Mexican version of the late Venezuelan President Hugo Chávez, López Obrador denounced that approach to governance and promised a uniquely Mexican form of populism.

**Goals, Principles, and Grand Strategy**

The Mexican military does not formally espouse or publish a national defense strategy. The country’s colonial legacy and 1917 constitution mean that Mexico tends to have an inward-

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\(^8^6\) The “economization” of Mexico’s foreign policy dates back several decades as part of a complementary strategy of development of more intimate integration with the United States. For more on this subject, see Jorge Chabat, “Mexico’s Foreign Policy in 1990: Electoral Sovereignty and Integration with the United States,” *Journal of Interamerican Studies and World Affairs*, Vol. 33, No. 4, 1991, pp. 1–26.
focused military. Mexico’s congress must approve any overseas operations in which the Mexican military wishes to engage, even training outside Mexico. This provision includes sailing the Mexican navy and marines outside Mexican waters. This restriction tends to limit Mexico’s potential military involvement abroad.

Not unlike other Latin American countries, Mexico is noninterventionist in its foreign policy, possibly even more so than its regional neighbors. For instance, Mexico did not join the U.S. coalition against the global war on terrorism and did not support the U.S. invasion of Iraq in 2003. Mexico went so far in its position of neutrality as to officially withdraw from the Inter-American Treaty of Reciprocal Assistance, a regional defense pact signed by members of the Organization of American States. Mexico’s noninterventionist stance includes peacekeeping. Mexico has not historically participated in UN peacekeeping operations and does not boast a peacekeeping operations force (only a few observers). However, Mexico did send representatives to Colombia during the recent peace talks there.

Notwithstanding Mexico’s noninternationalist tradition, the administration of former President Ernesto Peña Nieto began with hopes to exercise a more international role, replete with developing a peacekeeping operation school and potentially participating in UN missions. In a historic U-turn, the administration announced in 2014 that Mexican forces would take part in UN peacekeeping missions. Accordingly, Mexico did send a small contingent of forces to the UN missions in Haiti, Western Sahara, and Lebanon. But the country had to backtrack on its plans to develop a battalion-sized peacekeeping force: Domestic insecurity has forced the current administration to put these plans, aspirational though they were, on hold indefinitely.

Generally speaking, the current López Obrador administration has re-emphasized traditional principles of nonintervention and self-determination. During his inaugural speech, López Obrador promised that “We will be friends of all the world’s people and governments. The principles of non-intervention, self-determination and the peaceful settlement of disputes will be applied again.” Beyond such very generic statements, however, the López Obrador administration has not articulated specific new foreign policy doctrines or announced major new initiatives. Although enunciating some rhetoric about Mexico being a leader of nonaligned or developing nations, López Obrador has not traveled abroad to a significant degree and kept his focus inward, although his foreign minister has been more active in regional diplomacy.

Across several administrations, Mexico has, however, prioritized improving its relationship with other Latin American countries. This approach has been precipitated by the criticism that Mexico has for too long ignored its southern neighbors and by a concern that Mexico was

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89 “OEA: México abandona el TIAR [OEA: Mexico Abandons the TIAR],” BBC Mundo, September 2, 2002.


ceding its leadership role in the region to Brazil. Mexico’s relationship with the United States, and especially its military, has helped it engage southward. In April 2017, Mexico cohosted (with the U.S. Southern Command and U.S. Northern Command) the Central American Security Conference for the first time in Cozumel, Mexico. The event attracted the respective ministries of defense from Central America. Mexico has also taken a lead role in battling organized crime and curbing illegal immigration from El Salvador, Guatemala, and Honduras (an area known as the Northern Triangle). In summer 2017, Mexico and the United States cohosted the Conference on Prosperity and Security in Central America in Miami, Florida. The event brought together government and business leaders from the United States, Mexico, and Central America to address economic, security, and governance challenges and opportunities in the Northern Triangle. Finally, Mexico has also stepped up its maritime interdiction activity at the regional level, often in cooperation with U.S. efforts.

However, other factors have served to severely curtail further expansion of Mexico’s regional and even global reach. The domestic security situation in Mexico is the dominant such factor: It has deteriorated to unprecedented levels, forcing attention and resources inward to control the violence. In 2011, one year before President Felipe Calderón’s departure, the murder rate in Mexico reached record highs for that time (though Mexico surpassed those levels in 2020). His successor, Peña Nieto, chose not to make the war on the cartels a public centerpiece of his administration. However, Peña Nieto could not escape the problem. The cartels had grown too powerful. Between 2007 and 2014, some 164,000 people were victims of homicide. López Obrador has suggested a less confrontational and militarized approach to the drug war, but levels of violence have grown and the domestic obsession of Mexican national policy seems likely to persist. He has also avoided spending much of his policy energy on foreign issues.

View of Other Challengers
Mexico’s relationship with China has been dominated by economic concerns. Traditionally, the two nations have been rivals more than partners, competing over the U.S. market. Although that competition has been occasionally overstated—Mexican and Chinese companies export different types of products to the United States—the Chinese share of the U.S. import market has doubled since China joined the World Trade Organization in 2001 while

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92 On this competition see Rafael Fernandez de Castro, “Mexico’s Foreign Policy Agenda in Central America,” *Americas Quarterly*, Winter 2015.
the Mexican share has stagnated. This competition is reflected in the lack of Chinese investment to Mexico during a period in which China has lavished funds on other Latin American countries, like Brazil and Chile, which export important commodities to China.

Relations between Mexico and China improved after the election of President Trump. U.S. threats to the future of the North American Free Trade Agreement (NAFTA) created deep concern about the health of the Mexican-American economic relationship in Mexico City, and some Mexican political leaders and officials indicated a desire to diversify their nation’s economic partners. At the same time, Trump was attacking NAFTA during a round of negotiations, for example, Mexico’s Peña Nieto was meeting with China’s Xi and Russia’s Putin at a BRICS summit in China to discuss economic cooperation. The three leaders even spoke about the possibility of Mexico joining a “BRICS Plus” organization.

The relationship led to substantial cooperation, including an agreement signed by Peña Nieto to feature Mexican products on Alibaba and a deal for a Chinese company to develop two deepwater oil platforms in Mexican waters. Chinese leaders have proposed including Mexico in the Belt and Road Initiative and discussing substantial military cooperation. Early in the López Obrador administration, the two countries discussed avenues to increased political and economic cooperation. More recently, China has given some indications of increased investment in Mexico, but there has been little change in established patterns.

However, there are still sore spots in the Mexico-China economic relationship, including a trade deficit of more than $50 billion and doubts about the feasibility of a Mexican-Chinese economic partnership. Jorge Guajardo, a former Mexican ambassador to China, has said that any second Mexico spends negotiating with China over economic matters “is a second wasted” because the two economies are not complementary. More recently, Mexico has sought to take advantage of growing rifts in U.S.-China trade ties, making a case to U.S. firms to relocate operations from China to Mexico.

Mexico has occasionally cooperated with Russia on economic and military matters, but the relationship has dimmed in importance for both parties since the end of the Cold War.

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101 “After Trump’s Win, China and Mexico Move to Deepen Ties,” Reuters, December 12, 2016.
103 Martin, 2017.
106 Myers and Barrios, 2017.
107 “China, Mexico Vow to Elevate Military Ties to New High,” Xinhua, October 28, 2010; Myers and Barrios, 2017.
110 Myers and Barrios, 2017.
Although visiting the BRICS summit in China, President Peña Nieto did speak with President Putin about economic opportunities, and Mexico has purchased Russian military equipment, specifically Mi-17 helicopters, in the past.\textsuperscript{112} Mexico has also issued only lukewarm condemnation of the Russian annexation of Crimea and has not joined in sanctions against Russia.\textsuperscript{113} A Russian think tank hailed the election of Lopez Obrador as an opportunity for improved Russian-Mexican relations.\textsuperscript{114} However, even areas of cooperation are not without challenges; in one embarrassing incident, a Russian rocket carrying a Mexican satellite disintegrated over Siberia.\textsuperscript{115}

Overall, the Mexico-Russia relationship still remains, in the words of Richard Miles, a senior fellow at the Center for Strategic and International Studies, “superficial.” Miles also notes that “investment between the two countries is so low it can barely be measured. In 2016, Russian direct investment in Mexico was only $2 million, which in the same year [could] have purchased a 15-second Super Bowl commercial.”\textsuperscript{116} Recent offers from Moscow to supply Russian-developed vaccines to deal with the COVID-19 pandemic have been greeted with mixed enthusiasm.\textsuperscript{117}

Mexican relations with Iran, like with Russia, are limited by geographic distance and few obvious reasons for economic cooperation. Mexico has remained relatively quiet on Iran’s nuclear ambitions, and Iran has reached out to Mexico to lessen its diplomatic isolation.\textsuperscript{118} Trade between Mexico and Iran has increased in recent years, but it still remains well below even the trade between Mexico and Russia.\textsuperscript{119} Mexico supports the Joint Comprehensive Plan of Action.\textsuperscript{120}

**Relations with the United States**

Mexico’s national security and its position in the global economy are intimately tied to its relationship with its neighbor to its north.\textsuperscript{121} The integrity and historical underpinnings of the
relationship were recast by the Trump administration. This change caught Mexico by surprise and is forcing a reevaluation of the relationship on the part of Mexico.

This is a relationship whose integrity and most basic tenets have recently been cast in uncertainty, the degree of which caught Mexico completely off guard. The upshot of this is that the refashioning of its ties with the United States is the most critical wild card in Mexico’s security setting. Mexico has traditionally sought a partnership with the United States, its largest commercial partner, and tied much of its prosperity to the flourishing of this relationship. At the very least, the reset with the United States has forced Mexico to consider other international partners including China, its second-largest global trading partner. In fall 2017, Peña Nieto visited China, where he emphasized the need to promote trade and new investments with China. Mexico is China's largest commercial partner in Latin America, where China is expanding its stakes in Mexican infrastructure.

In economic terms, both the Trump and López Obrador administrations had expressed opposition to specific components of NAFTA. There was concern for some time that the agreement could collapse, with significant implications for future U.S.-Mexico relations. However, the two countries along with Canada reached an accord on a revised NAFTA, which is called the United States–Mexico–Canada Agreement.

Mexico's strategic relationship with the United States remains a conflicted partnership. Although the fundamentals of the relationship are unlikely to change—in particular, Mexico’s persistent if halting search for an independent voice—there are significant opportunities for the two countries to collaborate more significantly in various areas, and for the United States to encourage and facilitate a stronger Mexican role in some global issues. Although there will always be fractiousness in the relationship that outside actors, notably China, can try to exacerbate, the U.S.-Mexico relationship is also critical enough to both countries and grounded in such powerful historical and cultural ties that a significant shift in Mexico’s competitive alignment is simply not in the cards.

Summary
Mexico is an important emerging democracy but one without a well-established foreign policy posture or tradition. In most respects, it is aligned with U.S. objectives but (especially given recent developments) is likely to seek a more independent path in coming years. It may be reluctant to strongly or openly support U.S. actions to compete with Russia or China.

Summary of Perspectives of Emerging Democracies
Our analyses of the current character, strategies, and goals of these emerging democracies produced several findings. First, these are all essentially status quo powers—that nonetheless demand some redistribution of power in the international system. None of these states has major unresolved territorial issues or urgent territorial ambitions. All maintain relatively modest defense establishments, some designed mostly for internal security. India, for example, is a firmly status quo power, an active participant in the postwar international order, and a value-sharing democracy. Brazil considers itself to be, and acts as, what would be most correctly termed, a status quo power: Its identity and core strategic concepts are based on peaceful relations with

neighbors, and it has been broadly supportive of the core elements of the postwar international order. Indonesia is largely content with the global system and does not seek to upset the current order.

Yet these powers also believe that the postwar order remains too heavily tilted toward U.S. influence. At the UN, for example, India is a mildly revisionist power: It considers itself a natural claimant to a seat on the UN Security Council (a position supported by the United States, the UK, France, and Russia—but steadfastly opposed by China). Brazil also has the national ambition to rank among the first-world powers: It sees a global order in flux as the United States’ unipolar moment recedes and also an opportunity to eventually take its place as a first-tier power primarily via economic development and institutional participation.

Second, each of these emerging powers counts nonalignment as a leading principle of foreign policy. India was a leader of the nonaligned movement and strictly avoids formal alliances, a mindset that has constrained its degree of military engagement with the United States. After gaining independence in 1945, Indonesia established a foreign policy identity known as “free and active” (bebas aktif), which entailed protecting Indonesian national interests by not aligning with major world powers. As a result of the bebas aktif approach, Indonesia has maintained an unwavering opposition to formal alliances or defense pacts. Mexico is equally noninterventionist in its foreign policy: It did not join the U.S. coalition against the global war on terrorism and did not support the U.S. invasion of Iraq in 2003.

As a result, in part, none of these nations is interested in being recruited into U.S.-led confrontations with China, Russia, or Iran. Each would prefer to hedge and sustain a middle position between other competitors. Even countries that view China as a threat (such as India and Indonesia) also sustain significant trade balances with Beijing and would prefer to manage the relationship short of outright rivalry.

Third, like formal U.S. allies, these emerging powers have highly varied threat perceptions which do not match the National Security Strategy and National Defense Strategy articulation of challengers. India is perhaps the leading example of this reality: Whereas U.S. policymakers tend to see Russia as a bad actor, India does not. Throughout the Cold War, the Soviet Union was India’s primary great-power patron, and even in the post–Cold War era, Russia maintained a close friendship with India. From India’s standpoint, moreover, Iran is a historical friend and partner. Brazil has not joined in Western sanctions against Russia and has generally maintained neutrality in the disputes between Russia and the West, refusing to condemn Russia after the annexation of Crimea or the Skripal poisonings. Despite China’s growing assertiveness in the South China Sea and growing Sino-Indonesian tension over the Natuna waters, Indonesia has not officially identified China as a security threat. On the contrary, the Chinese trade presence is only increasing, drawing Jakarta more fully into Beijing’s economic orbit.

One important implication is that the United States needs a careful and nuanced approach to these emerging democracies in a more-competitive era. To take two leading examples, India and Brazil: Although India is a value-sharing democracy, it jealously guards its policy independence, has no desire to be recruited as a U.S. ally in a policy of containing China, is friendly with other U.S. rivals (Iran and Russia), and remains unwilling to join with the United States in coercive liberal value promotion. India’s general influence on the emerging international era is likely to be positive, but there is a risk that the United States will want it to play a role for which it is temperamentally and strategically unsuited. Brazil, like India, is a value-sharing democracy that has had a stabilizing influence on the postwar order and largely supports U.S.
goals for a peaceful international system characterized by an open trading system. Yet like India, it demands autonomy and increasingly seems likely to chart a course somewhat independent from U.S. dictates. It does not support forcible value promotion and its concern for Russian and Iranian aggression is limited. If the United States is not careful, it could risk overplaying its hand and alienating key emerging democracies.
In addition to U.S. allies and key emerging democracies, several other countries are likely to play especially significant roles in the regional development of the strategic competition. In this section, we evaluate one such actor in some detail (Vietnam), and two others—Turkey and Saudi Arabia—somewhat more briefly.

**Vietnam**

Vietnam’s view and approach toward global order is reflected in its position in the Indo-Asia-Pacific region as a medium-sized coastal state whose livelihood depends on an open and inclusive regional order that would enable smaller states to be more resilient and remain strategically relevant amid great-power rivalry. Vietnam can be adequately described as a status quo power: It is a member and active participant of all the major global and regional security and economic forums, to include the UN, the World Trade Organization, the International Monetary Fund, the World Bank, and the Association of Southeast Asian Nations, among others.

Vietnam is generally satisfied with the world order in its current incarnation. Although Vietnam holds certain views on freedom of navigation under the UN Convention on the Law of the Sea that are at odds with the U.S. interpretation, these views are tertiary to the fundamental nature of the international system and not indicative of a country that would be considered “dissatisfied” with the global order.1

Like Indonesia, Vietnam struggles with normative assessments of human rights, freedom of the press, and health of the democratic system, which some Western nongovernmental organizations have highlighted as an issue of concern.2 In the 2018 World Press Freedom Index, Vietnam was ranked 175 of 180 countries in press freedom—last in Southeast Asia and just behind China at 176.3

Vietnam also claims significant areas of disputed territory in the South China Sea, also claimed by China, the Philippines, Malaysia, Brunei, and Taiwan. Such claims do expose Vietnam to critiques that it harbors expansionist territorial claims, and thus places it in the category of a “modestly dissatisfied country” in the international order. However, unlike China,

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1 Vietnam is one of a small group of nations that require prior notification or authorization of the innocent passage or foreign warships within its territorial seas and exclusive economic zone (see Roach and Smith, 1994, Table 10, pp. 158–159; and Chuah Meng Soon, 2016.


Vietnam does not actively seek to repel other claimants from freedom of navigation operations, prevent exploitation of natural resources, or otherwise unilaterally change the status quo near these features. This relatively benign behavior around disputed territory lends itself to categorizing Vietnam as a status quo power in general terms.

Goals, Principles, and Grand Strategy
Vietnam does not have a strategy to respond to the emerging competitive landscape among great powers. Instead, the foundation for responses is provided by the foreign policy adopted by the Communist Party of Vietnam. The five themes of independence, self-reliance, multilateralization, diversification, and international integration have formed the backbone of Vietnamese foreign policy since 1991.4 The 2013 Strategy of International Integration by 2020 and Vision 2030 explains Vietnam’s strategy for thriving in the international system in the following way:

International integration is a process of both cooperation and struggle which persistently upholds the nation’s and people’s interests; preserves and promotes national cultural identity as well as the political identity of the regime; and does not join forces or alliances with third parties. Vietnam seeks to increase the interdependence between our country and others, particularly those vital to the defense and development of the nation, but we shall never fall into dependence under any circumstances or any sector.5

Notably, Vietnam’s policy of international integration has expanded from focusing primarily on economics in the 1990s to encompass all sectors, including political, security, and defense.

At the same time, Vietnam makes clear it will not become reliant on any outside power either to ally with or to balance against, as it did during the Cold War with the Soviet Union. It will continue to make efforts to create a web of multidimensional, intertwined interests with as many nations as possible. By 2016, Vietnam had established diplomatic relations with 187 out of 193 UN members; established strategic partnerships with 15 nations; and established comprehensive partnerships with ten countries, including all the great powers and five standing members of the UN Security Council.6 Vietnam has also joined all major multinational institutions, including the World Trade Organization, Association of Southeast Asian Nations, the Asia-Europe Meeting, the Asia-Pacific Economic Cooperation, Regional Comprehensive Economic Partnership, the Belt and Road Initiative, the upcoming Comprehensive and Progressive Agreement for Trans-Pacific Partnership, and numerous bilateral and regional free trade agreements.7

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4 The 2016 Communist Party of Vietnam Congress also reaffirmed these themes by saying it abides by a “consistent foreign policy of independence, self-reliance, peace, cooperation and development; diversification and multilateralization of foreign relations; proactive international integration; being a friend, a reliable partner and a responsible member of the international community” (see Communist Party of Vietnam, “12th Party Congress Political Report,” August 30, 2017).


7 In regional security, Hanoi is also committed to “building and implementing plans to participate in other multinational institutions of defense and security and proactively contributing to the formation of East Asian and Asia-Pacific security architectures” (see Government of the Socialist Republic of Vietnam, 2016).
As a result, balancing ties with great powers is pivotal for Vietnamese diplomacy. Such a balance plays a critical role in sustaining an environment of peace and stability, particularly with the United States, Russia, and China, according to one Vietnamese expert working in the Ministry of Foreign Affairs. For example, the revised national defense strategy emphasized rhetoric on enhancing cooperation to create “intertwined strategic interests between our nation and others, especially large powers, strategic partners, neighbors and regional countries; while avoiding conflicts, confrontation, isolation and dependence.” Such a balancing strategy among great powers is exhibited in bilateral meetings and international visits of Vietnamese leaders to large nations, especially to China and the United States. For instance, Communist Party of Vietnam Secretary Nguyen Phu Trong visited China in April 2015, three months prior to his trip to the United States in July. Hanoi invited the presidents of both China and the United States to pay an official visit to Vietnam when it hosted the Asia-Pacific Economic Cooperation Summit in 2017.

Vietnam has adopted a consistent foreign policy approach of shunning alliances since the 1990s. This policy was often referred to as the “Three No’s” policy, stating that “Vietnam’s policy is no participation in military alliances, no foreign military bases located on its land and no foreign use of its territory against other countries.” This policy was mentioned again by Vietnamese officials in the early 2010s and in the media, in particular in relation to China. In 2019 with the release of a new Defense White Paper, this policy was extended to what is now called the “four no’s and one depend” policy: As one Vietnamese source put it, this means “neither joining any military alliances, siding with one country against another, giving any other countries permission to set up military bases or use its territory to carry out military activities against other countries, nor using force or threatening to use force in international relations.” But the strategy also stated that “depending on circumstances and specific conditions, Vietnam will consider developing necessary, appropriate defense and military relations with other countries.”

The 2019 Defense White Paper in fact represents Vietnam’s most significant recent step in the direction of formalizing a conceptual foundation for new defense partnerships. Although once again reaffirming the country’s allergy to formal military alliances, the white paper explicitly added the “depends” language referenced above and endorsed the idea of Vietnam “promoting defense ties with other countries to boost its capabilities in sovereignty pro-
tection and in settlement of common security challenges.”  

One result, which we will describe next, was slightly enhanced security engagements with both the United States and Russia to help offset Chinese coercive pressure.

Currently, there are three main themes that characterize Vietnam’s perspective on the global system: an accelerated multipolar and interdependent world, increased competition among great powers (specifically, the United States and China), and an emerging but unstable Asia-Pacific. According to a recent document outlining its view of the international system, published in 2013, the Communist Party of Vietnam highlights globalization as a factor that “will continue to be deepened in all areas.”

In particular, the “level of interdependence among countries will increase steadily, with multilateral mechanisms and international organizations maintaining increasingly important roles in all aspects of human life.” The 12th Congress in 2016 of the Communist Party of Vietnam, the nation’s supreme decisionmaking body, supported this broad consensus of the international order, assessing that “the multipolar, multi-center world has been accelerating, with great powers revising their strategies for cooperation, compromise, competition, struggle and mutual containment.”

This view suggests that the unipolar moment of U.S dominance is receding in favor of multipolarity and global integration through trade, people-to-people exchanges, and cooperative regional bodies seeking to forge common goals and ideals that bring countries closer together. Notably, Vietnam emphasizes the interdependence among countries, be them large or small, creates a “web of interconnections with various levels and sizes,” creating “opportunities for small countries like Vietnam to engage into the global competitive game.”

At the same time, Vietnam sees increasing competition between great powers, specifically, China, the United States, Russia, India, and Japan. Since the early 2010s, Vietnam has highlighted the role of great powers in the international system. Hanoi also believes that these great powers are modifying their strategies for both struggle and cooperation, which reveals both opportunities and challenges for Vietnam. In this sense, Vietnam sees relations among large nations within an overall framework of cooperation and competition, with the latter arguably increasing and harder to predict. Within this great-power rivalry, Vietnam’s international integration strategy predicts that “the U.S. will remain a superpower,” but that China and India will “sustain their growth and raise their profile in regional and global affairs.”

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15 Because of its political system, all of Vietnam’s vital policies, including foreign policy, are decided by the Communist Party of Vietnam at the Party Congress every five years and, if necessary, at in-between meetings in the form of resolutions.


19 See, for example, Nghia, 2017; and Communist Party of Vietnam, 2017.

20 For instance, the General Strategy of International Integration by 2020 and Vision 2030 stated: “Gradually enhance the cooperation effectiveness with neighbors and major nations, such as China, the US, Russia, India and Japan” (see Government of the Socialist Republic of Vietnam, 2016, p. 2).


22 Tran Viet Thai, 2017.

Finally, Vietnam sees the Asia-Pacific region as the center of global competition among great powers.24

**Views of Other Challengers**

Adopting a foreign policy of “being a friend, a reliable partner and a responsible member of the international community,” Vietnam has never officially identified any nations as its major threats or competitors. However, based on recent events in the South China Sea, it is reasonable to assess that China remains Vietnam’s biggest threat and competitor. This stance has become even more explicit since 2018.

Vietnam considers a friend as a “partner” for cooperation and a threat or competitor as a “target” to struggle against. From Hanoi’s perspective, *partners* are defined as “those [who] respect our independence and sovereignty and who establish and expand a cooperative, mutually beneficial and friendly relationship” and *targets* are “those [who] plot or undertake activities against our national goals and defense of the Fatherland.”25 Vietnam also views certain countries (although never identified openly) as neither pure partner nor target but rather as “dual-status” countries—meaning they are partners and targets depending on the issues and contexts.26 China is a good example of such a status—it is a partner in trade and investment but a target in territorial disputes. This helps to account for the seeming contradictions in Vietnam’s approach to China—viewing it as a coercive competitor and potential adversary but also maintaining a “comprehensive strategic cooperative partnership” with Beijing—the highest formal level of relations in Vietnam’s diplomacy.

Based on these definitions, we can infer from official statements and political practice that Laos, Russia, Japan, and India are Vietnam’s major friends and partners; China is Vietnam’s economic partner but also its main target in sovereignty disputes; and the United States and EU are Vietnam’s major partners for trade and investment but, at times, may be targets for such issues as human rights, democracy, and religion in Vietnam.27 Such complex formulations make it clear that the United States will be frustrated if it looks to Vietnam to make simple binary conclusions about the overall strategic competition.

Among Vietnamese partners and targets, China and the United States are arguably the most important.28 Historically and less officially, China has been and remains the main threat to Vietnam’s territory and sovereignty. Vietnamese history is full of cases of invasion at the hands of China. Although China and Vietnam have shared and continue to share the same

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24 The Communist Party of Vietnam, for example, assesses that the Asia-Pacific region “will become a center of development in the world, and that the Association of Southeast Asian Nations “is building a community that will continue to maintain a central role in most of regional cooperation mechanisms and will have an increasingly important position in the strategy of major countries” (see Communist Party of Vietnam, Ministry of Foreign Affairs, 2013).


Understanding the Emerging Era of International Competition Through the Eyes of Others

communist ideology, the two countries fought short naval and land battles in 1974, 1979, and 1988 that pit the Communist “comrades” against each other. Since the renormalization of diplomatic relations in 1991, the two countries have maintained a dual-status in bilateral ties, incorporating elements of cooperation and struggle.

A possible tipping point in Sino-Vietnamese relations came in 2014 when Hanoi took a firm stand against what it felt was creeping Chinese assertiveness in the South China Sea. In May 2014, China moved a giant oil rig into Vietnam’s Exclusive Economic Zone, triggering a two-month standoff in which China attempted to protect the rig with its coast guard, navy, and fishing vessels. Vietnam, perhaps to China’s surprise, responded vigorously by sending its own coast guard and fishing vessels to confront the Chinese cordon. Vietnam also conducted regular press conferences showing evidence of Chinese aggressive activities, and appeared to condone public protests in large cities throughout Vietnam. One scholar suggested that the incident prompted Hanoi to consider international legal measures against Beijing and a reevaluation of its long-standing “Three No’s” policy.

After the oil rig tension, Hanoi seemed to enhance the “struggle” component of its dualistic “cooperation and struggle” policy with Beijing. In July 2017, Beijing reportedly threatened to use force against Vietnam’s occupied features in the South China Sea if Hanoi refused to stop exploring for oil in its Exclusive Economic Zone in the South China Sea. Vietnam was also the only voice against Chinese building of artificial islands at the Association of Southeast Asian Nations ministerial meeting in August 2017.

These tensions have intensified since then. China has sent geological survey vessels into areas of the South China Sea claimed by Vietnam and continued to militarize its island bases in the region despite Hanoi’s protests. Clashes between Chinese and Vietnamese fishing vessels have continued. Vietnam has reportedly become increasingly anxious to push back on the long-term Chinese effort to acquire de facto sovereignty in the area, though without openly confronting Beijing if possible.

In line with its foreign policy preferences of not seeking allies or enemies, Vietnam rarely issues official statements that explicitly highlight China as a target or adversary. Yet a close reading of unofficial channels highlights the fact that Hanoi regards Beijing as a threat to its

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30 Thayer, 2017.

31 For example, Vietnamese official documents seemed to downplay the “16 words” and “4 goods” policies toward China, which were previously the key frameworks for bilateral relations since 2000. The “16 words” policy is generally assumed to refer to such principles as maintaining a relationship as friendly neighbors with cooperation and stability; and the “4 goods” refer to being “good neighbors, good friends, good comrades and good partners.”


security and sovereignty, especially in the South China Sea.\textsuperscript{36} Vietnamese government officials also seem to be increasingly candid regarding the China threat. In an unofficial video clip released in March 2017, Major General Truong Giang Long, Vice Chief of the Political General Department and President of the Political Academy within the Ministry of Public Security, revealed that “China has never abandoned its malign intention to capture our territory in the East Sea (South China Sea). It is only a matter of when and how it will act.” He also stated that China had “implanted” hundreds of moles into Vietnamese agencies.\textsuperscript{37}

Russia remains one of Vietnam’s most important international partners. With a legacy of Cold War arms transfers and military cooperation, the two countries retain a strong military tie, especially as expressed through arms sales. Recently, Vietnam has reaffirmed its security relationship through bilateral joint vision statements, made a public promise to increase trade, and worked to get Russia involved in oil development projects in the South China Sea—although the Russian firm Rosneft has backed away from these projects, reportedly under pressure from China.\textsuperscript{38} Partly because of constraints imposed by its more important ties to China, however, Russia is unlikely to play a meaningful balancing role in the region. From the standpoint of U.S. policy, however, Vietnam does not see Russia as a strategic competitor, at a minimum, and would not join efforts to constrain its influence.

Relations with the United States

Despite being enemies during the Vietnam War, the United States has incrementally turned into one of Vietnam’s most important partners since normalization of relations in 1995. Both nations have made dramatic progress in forging trade, investment, education, and even defense and security ties, particularly after their bilateral Comprehensive Partnership agreement signed in 2013.\textsuperscript{39} The obstacles between the two countries, however, remain on divergent viewpoints and policies on human rights, democracy, and religion. Long, the major general in the same interview mentioned earlier, expressed concerns over U.S. intervention into “internal Vietnamese issues,” particularly on human rights, democracy, and religious issues, but noted that Vietnam had an important role to play within the U.S. “Pivot to Asia” policy, particularly in coping with China.\textsuperscript{40}

Because of its balancing strategy with large powers, Vietnam rarely expresses official and public statement about the role of the United States or other powers in the competitive landscape. However, in the past few years, Hanoi has shown support for increased U.S. presence in the Asia-Pacific region, especially in response to the emerging domination of China. Although Vietnam’s trade deficit with China has been an issue of perennial concern for more than a

\textsuperscript{36} “At a meeting with overseas Vietnamese in 2012, for example, Major General Nguyen Thanh Tuan, director general of Communication and Training Department at the Defense Ministry, identified China as the main threat to Vietnamese territorial integrity in the South China Sea, asserting that China harbors a long-term, “three-phase strategy” to monopolize the South China Sea (see “Defend the Sea and Islands by the World’s Most Cutting-Edge Weapons,” Tien Phong Online, September 29, 2012.

\textsuperscript{37} “Why Did General Truong Giang Long Retire?” BBC Vietnamese, October 5, 2017.

\textsuperscript{38} Bennett Murray, “Russia’s Awkward Dance with Vietnam,” Foreign Policy Research Institute, October 14, 2019; Nick Trickett, “Rosneft’s Vietnam Exit Hints at Russia Inc.’s Future in Asia,” The Diplomat, August 28, 2020.


\textsuperscript{40} “Why Did General Truong Giang Long Retire?” 2017.
decade, Vietnam has seen bilateral trade blossom with the United States, from $450 million in 1995 to more than $54 billion in 2017.\textsuperscript{41} Vietnam was also proactive in joining the Trans-Pacific Partnership, a 12-member trade bloc that does not include China, but from which the United States eventually withdrew.

Based on its strategy of “multilateralizing” its diplomacy, Vietnam has supported U.S. engagement in the region since the mid-2000s. The 2010 Association of Southeast Asian Nations Regional Forum in Hanoi was a watershed moment in U.S. engagement in the region, during which Secretary of State Hillary Clinton announced that the United States had a “vital interest” in peace and stability in the South China Sea. Vietnam also welcomed American participation in all regional forums and events, such as the U.S.-Association of Southeast Asian Nations summit or the annual Association of Southeast Asian Nations Defense Minister’s Meeting-Plus meeting. Although Beijing opposes the U.S. Freedom of Navigation Operations near the disputed features occupied by China in the South China Sea, Hanoi does not oppose such operations.

In response to the U.S. schedule of Freedom of Navigation Operations in the South China Sea in September 2017, Hanoi asserted that “Vietnam respects the rights of every nation to conduct its rights to freedom of navigation and overflight in accordance with international law.”\textsuperscript{42} Furthermore, in 2016, Vietnamese Vice Defense Minister Nguyen Chi Vinh “affirmed that Vietnam will support the U.S and other partners to intervene in the region as long as it brings peace, stability and prosperity.”\textsuperscript{43} Notably, the visit of U.S. aircraft carrier USS \textit{Carl Vinson} to Da Nang in early March 2018 indicated the extent to which Hanoi welcomes an increased U.S. military presence in the region.\textsuperscript{44} This trend has continued with a series of security engagements since 2017 including several prominent joint statements, the transfer of surplus U.S. Coast Guard cutters to Vietnam, and the establishment of working groups on humanitarian assistance and disaster relief.\textsuperscript{45}

\textbf{Summary}

Vietnam’s strategy for succeeding in the international environment is first and foremost to shift away from ideologically drive imperatives toward a foreign policy orientation based on “national interests” and the rule of law. Overall, Vietnam views peace and development as the prevailing norm in international relations, but with great-power competition and unstable factors threatening peace in the Asia-Pacific. To navigate this environment, Vietnam has chosen to multilateralize relations with great powers, being careful not to lean too far to one side and

\begin{itemize}
\item My Pham, “Vietnam Gives Thumbs-Up to U.S. Regional Role as Pivot Stumbles,” Reuters, October 18, 2016.
\item According to Nguyen Tien Hung, former adviser to South Vietnamese President before 1975, this is the first port call of a US aircraft carrier to Vietnam not only after the Vietnam War, but in the history, not including the small, old USS \textit{Card} aircraft carrier transporting military equipment to Vietnam that was bombed in 1964. See more at Nguyen Tien Hung, “Da Nang and US Strategic Turning Points,” BBC, February 24, 2018.
\end{itemize}
adhering to its “Three No’s” policy shunning military alliances. Of its relationship with the two most consequential great powers—the United States and China—there has been a subtle but discernable shift in Vietnam’s policy, characterized by relative closeness to China in the 1990s, to in between the two great powers by the 2000s, to getting closer to the United States by the mid-2010s, to building a comprehensive partnership with the United States (particularly in the security and defense realms) in 2018. However, its determination to calibrate its approach to China remains intact. Despite its recent tensions with Beijing, Vietnam remains allergic to the idea of being recruited into a formal anti-China coalition.

Key Regional Powers: Turkey and Saudi Arabia

Beyond Vietnam, we assessed the current national security postures and reaction to growing competition on the part of two additional states with especially important regional profiles and global influence: Turkey and Saudi Arabia. The following sections offer brief summaries of the same basic issues discussed in the country analyses earlier in this report: their goals, principles, and strategy; their view of challenger states; their relations with the United States; and a summary of their potential role in the strategic competition.

Turkey

Since the end of World War II, Turkey has looked to NATO for security and Europe for economic prosperity, paying less attention to the wider Islamic world. This foreign policy orientation was in accordance with Kemalism, the official ideology of the Turkish state, which highlighted the importance of secularism, Western economic development, and nationalism. However, Turkey’s westward orientation has been undergoing a significant and perhaps ultimately major reorientation under the leadership of President Recep Tayyip Erdoğan, who has made Turkey more authoritarian, less secular, and more regionally ambitious, in both the Middle East and Central Asia.

Turkey has not made any foreign policy or defense strategy documents publicly available. Therefore, this section relies on statements by Turkish leaders, secondary sources, and information from the Ministry of Foreign Affairs website. Turkey’s current relationship with many key actors, most notably the United States and the EU, remains in significant flux. This brief summary of Turkey’s basic interests and perspectives on the competition did not attempt to remain current with the details of these relationships, but only to summarize the high-level interests and objectives that are shaping them.

Given its historical geostrategic importance, Turkey has an expansive view of its international position. The Ministry of Foreign Affairs declares that Turkey is “a key regional secu-

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49 Republic of Turkey, Ministry of Foreign Affairs, homepage, undated-a. The website provides a large amount of information on Turkey’s goals, principles, and worldview, but it is unclear whether this information is authoritative or reflective of Turkey policy.
rity player in Europe, the Balkans, the Caucasus, the Middle East, the Mediterranean and the Black Sea regions and beyond. Therefore, Turkey takes an active role in a plethora of international organizations, including the UN, the Organization for Security and Co-operation in Europe, the Organisation of Islamic Cooperation, the Organisation for Economic Co-operation and Development, the D8 Organization for Economic Cooperation, the Council of Europe, the Organization of the Petroleum Exporting Countries (OPEC), the Asia-Pacific Economic Cooperation, and the Cooperation Council of Turkic Speaking States.

Turkey is also a member of NATO, which the Ministry of Foreign Affairs calls “the cornerstone of Turkey’s defense and security policy.” Turkey has a large military—the second largest in NATO by number of personnel—and more than 3,000 Turkish troops were deployed in over a dozen peacekeeping missions through NATO and the UN in 2010. Turkey has also expressed a strong desire for years to join the EU, although this has become extremely unlikely given Turkey’s continued occupation of the northern half of Cyprus (an EU member state), Turkey’s increasing authoritarianism, its intensifying maritime disputes with Greece and others, and recent disputes with other EU nations.

In May 2009, Ahmet Davutoğlu became Turkey’s Foreign Minister and articulated a new vision for foreign relations: the “zero problems with neighbors” policy. This policy saw Turkey reverse its long-standing neglect of the Middle East and attempt to position itself as a peacemaker in the region. The Ministry of Foreign Affairs describes the Zero Problems policy as an assumption of additional responsibilities made necessary by Turkey’s ability to provide stability in a region beset by rapid changes. The Ministry of Foreign Affairs claims Turkey is universally respected because of its democratic and secular nature, strong economy, and commitment to the rule of law.

Davutoğlu’s worldview was described as “neo-Ottomanism” by scholars and pundits, though Davutoğlu himself rejected that phrasing. Neo-Ottomanism as a philosophy is marked by a determination to increase Turkey’s influence in the former territories of the Ottoman

50 Republic of Turkey, Ministry of Foreign Affairs, undated-f.
51 Republic of Turkey, Ministry of Foreign Affairs, “International Organisations,” webpage, undated-b.
52 Republic of Turkey, Ministry of Foreign Affairs, undated-f.
54 Republic of Turkey, Ministry of Foreign Affairs, “Questions,” webpage, undated-d.
55 European Commission, “European Neighbourhood Policy and Enlargement Negotiations: Turkey,” webpage, last updated May 2019. Turkey’s occupation of the northern half of Cyprus dates back to a 1974 invasion of the island. The European Commission of Human Rights found that Turkey violated the Convention on Human Rights in its treatment of Greek Cypriots, and the Cyprus issue has long been a problem for Turkey, even with other Muslim nations. See European Commission of Human Rights, Applications Nos. 9780/74 and 6950/75 Cyprus Against Turkey Report of the Commission, Council of Europe, July 1976; and “Egypt’s Sisi Demands Turkish Cypriots Removed from OIC,” World Bulletin, October 7, 2014.
56 Blake Hounshell, “Mr. ‘Zero Problems,’” Foreign Policy, November 28, 2010.
58 Republic of Turkey, Ministry of Foreign Affairs, “Turkey’s Enterprising and Humanitarian Foreign Policy: A Synopsis,” webpage, undated-c.
59 Republic of Turkey, Ministry of Foreign Affairs, “Policy of Zero Problems with Our Neighbors,” webpage, undated-c.
empire, making Turkey a regional superpower.\textsuperscript{60} While neo-Ottomanism is “void of imperialist expansionism,” it is a rejection of Kemalism and its Western and secular outlook.\textsuperscript{61} The Zero Problems policy and neo-Ottomanism can be understood in the context of Turkey’s continuing frustrations at denied EU membership and the subsequent reorientation of Turkish foreign policy toward the Middle East.\textsuperscript{62} More recently, some trends in Turkey’s foreign policy dialogue have been described as “ultra-nationalism”—not in the sense of aggressive, “pan-Turkic” ambitions of gaining more territory or regional dominance, but more focused on domestic Turkish interests (such as the Kurdish question) and suspicious of the designs of foreign powers.\textsuperscript{63}

The Arab Spring provided the first real test of the Zero Problems policy, a test which it failed miserably as Turkish leaders backed the losing sides in various power struggles.\textsuperscript{64} Erdoğan and Davutoğlu believed that the Arab Spring would see a triumph of the Muslim Brotherhood and thus supported Mohamed Morsi of Egypt.\textsuperscript{65} When Abdel Fattah el-Sisi unseated Morsi in a coup, Erdoğan was furious with Western nations for not denouncing the coup with greater intensity and said of the new regime, “I am saying that state terrorism is currently underway in Egypt.”\textsuperscript{66} A breakdown in diplomatic relations between the two countries quickly followed.\textsuperscript{67}

In Syria, Erdoğan believed that Assad would quickly be ousted and provided extensive aid to the rebel factions opposing Syria’s government while calling Assad a “terrorist.”\textsuperscript{68} Assad has held on to power and has vowed to retaliate against Turkey.\textsuperscript{69} Turkey bartered Assad and his allies, opposed Iranian involvement, fought against the Kurds, skirmished with the Islamic State, feuded with the Russians, and clashed with the U.S.-led coalition over the Kurdish issue. Turkey absorbed millions of refugees from Syria, making Turkey the nation with the most refugees in the world.\textsuperscript{70} Turkey even invoked NATO’s Article 4 multiple times during the Syrian Civil War, but has not received the assurance it sought.\textsuperscript{71} Unofficial feelers from Turkey about invoking Article 5 were rebuffed.\textsuperscript{72}

Between 2017 and 2020, Turkey’s regional actions have prompted considerable controversy and blowback. As of 2020, most observers were using a set of consistent adjectives to

\textsuperscript{60} Taspinar, 2008.
\textsuperscript{61} Taspinar, 2008.
\textsuperscript{64} Mark Lowen, “Erdogan’s ‘New Turkey’ Drifts Toward Isolation,” BBC, November 20, 2014.
\textsuperscript{66} Zalewski, 2013.
\textsuperscript{67} Yakis, 2014.
\textsuperscript{68} Tuvan Gumrukcu and Ece Toksabay, “Turkey’s Erdogan Calls Syria’s Assad a Terrorist, Says Impossible to Continue with Him,” Reuters, December 27, 2017.
\textsuperscript{69} “Syria Ratchets Up Tension with Turkey—Warning It of Dangers of Rebel Support,” Euronews, April 10, 2013.
\textsuperscript{70} Hannah Summers, “Why We’re Paying the Rent for a Million Syrian Refugees,” The Guardian, March 26, 2018.
\textsuperscript{72} Michael Moran, “Turkey’s Article 5 Argument Finds No Takers,” Carnegie Corporation of New York, February 24, 2016.
describe Turkey’s evolving foreign policy: Militarized, irredentist, provocative, and aggressive.73 This has been true in its unconditional support for Azerbaijan in the continuing war over Nagorno-Karabakh, the increasingly strident ideological overtones of its policy, its extensive involvement in the Libyan civil war, and its militarized approach to Eastern Mediterranean resource disputes. In its militarized approach to the latter issue, it has courted EU sanctions. In short, Turkey currently finds itself in a state of growing isolation because of a series of foreign policy blunders and frustrated global ambitions.74 Turkey’s future strategic plans are unclear. Regardless of Turkey’s international isolation, Erdoğan has succeeded in consolidating power for himself at home.75

The United States and Turkey are NATO allies and historical partners, and this alliance remains in place and healthy at some military-to-military levels. But the relationship has been rocked by several disputes since 2015. One is a bitter disagreement over the Kurdish issue in Syria. The United States views the Kurdish People’s Protection Units (YPG) as an effective and essential force in the fight against terrorism; Turkey views the YPG as itself a terrorist organization and as a fundamental threat to Turkey.76 Turkey’s concerns are rooted in its internal problems with the Kurdistan Workers’ Party, which is listed as a terrorist organization by NATO and is regarded by Turkey as inextricably linked to the YPG.77 Erdoğan decried U.S. support for the YPG, saying that the United States is giving “weapons for free to a terror organization” and that continued U.S. aid to the Kurds shows that the United States has “designs against Turkey.”78 The more recent withdrawal of most U.S. forces from these areas helped to somewhat defuse these tensions, but the history of U.S. support for Kurdish forces remains a major irritant in the relationship.

Another source of tension was the fallout from the 2016 coup attempt against Erdoğan. In July of that year, factions within the Turkish army attempted to seize power, dropping bombs on the parliament building and kidnapping key officials before being defeated by loyalists.79 Erdoğan placed blame on Fethullah Gulen, a reclusive cleric who lives in exile in Pennsylvania, and, by extension, on the United States.80 Erdoğan declared Gulen’s followers to be terrorists, and he is outraged that the United States refuses to grant Turkey’s repeated requests for extradition.81 Turkey’s relations with the United States were further strained by Turkey’s

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73 See, for example, Sinan Ulgen, “A Weak Economy Won’t Stop Turkey’s Activist Foreign Policy,” Foreign Policy, October 6, 2020; Aykan Erdemir and Philip Kowalski, “‘Blue Homeland’ and the Irredentist Future of Turkish Foreign Policy,” War on the Rocks, September 30, 2020b; and Marc Pierini, “Emerging from the Pandemic, Turkey Rolls Out a More Assertive Foreign Policy,” Carnegie Europe, June 3, 2020.

74 Lowen, 2014.

75 Lowen, 2014; Jane’s by IHS Markit, 2018.


77 Republic of Turkey, Ministry of Foreign Affairs, undated-d.


intent to procure Russian S-400 antiair defenses; Congress considered freezing arms sales to Turkey and removing Turkey from the F-35 joint strike fighter program.\textsuperscript{82} Public opinion in Turkey has also turned somewhat against the relationship: As of February 2020, views of NATO were lower in Turkey than in any other member state—and only marginally less negative than in Russia. Also, as of early 2020, general U.S. favorability ratings in Turkey were far lower than any other ally: Some three-quarters of Turks had an unfavorable impression of the United States.\textsuperscript{83}

Therefore, as of 2020, the Turkey-U.S. strategic relationship has retained some traditional foundations—notably, the NATO alliance itself and a certain degree of ongoing military cooperation. But disagreements over a variety of issues have become intense, and Erdoğan and other senior Turkish leaders appear to be reassessing their country’s traditional alignments. More than most other alliances, the rifts splitting Turkey and the United States have to do with foundational assumptions rather than surface complaints.\textsuperscript{84}

Yet Turkey’s potential for radically shifting alignment in the strategic competitions with Russia and China is constrained by its mixed relations with each of those major powers. Turkey has historically viewed Russia as a security threat and has sought out Western powers for security guarantees. In Syria, Turkey and Russia have supported opposite sides of the conflict. The commensurate worsening of relations reached its nadir in November 2015 when Turkish F-16s shot down a Russian Su-24 over the Turkish-Syrian border.\textsuperscript{85} Since that low point, however, Turkish relations with Russia improved to some degree, including through work on a joint Syrian peace plan.\textsuperscript{86} The warming appeared to stem from various sources, including a sense in Ankara that the United States would not firmly back Turkish push-back against Russia and a Russian effort to take advantage of weak U.S. diplomacy in the region.\textsuperscript{87} The two countries sought to expand trade and energy development ties, including through the major infrastructure projects of TurkStream, BlueStream, and the Akkuya Nuclear Plant. Yet this warming did not last long: By mid-2020, Turkish-Russian relations had again hit several roadblocks.

Outside Syria, Turkey’s relations with Russia have been complicated by divergent interests. The two countries stand on opposite sides of conflicts in Libya, Syria, and Nagorno-Karabakh, and continuing proxy fighting in Syria had created another risk of direct Turkish-Russian confrontations in February 2020. In March 2020, Russia’s Putin created outrage in Turkey by forcing Erdoğan and his entourage to wait like supplicants before a summit meeting in Moscow.\textsuperscript{88} On long-term issues, the countries also have strict differences: Although Turkey has not issued sanctions against Russia, Erdoğan has consistently supported Ukraine.


\textsuperscript{85} “Turkey’s Downing of Russian Warplane—What We Know,” BBC, December 1, 2015.


and called the occupation of Crimea an “illegal annexation.”

Turkey and Russia have yet to cooperate on a host of issues in the South Caucasus that have traditionally strained the relationship. In sum, while Turkey may continue to use Russia as a way of tweaking the West and seeking specific military capabilities, the two countries have too many historical and current policy disputes to make Moscow a comprehensive strategic partner for Ankara in the context of the larger strategic competition.

Turkey’s relations with Iran alternate between cooperation and competition on a wide host of issues that defy easy classification. In 2010, relations improved after a deal sent Iranian nuclear fuel rods to Turkey for storage to stave off international sanctions. A year later, relations worsened after Turkey deployed an advanced radar system as part of NATO’s antimissile shield despite fierce objections from Tehran.

Relations between the two countries further soured after they took opposite sides in the Syrian and Yemeni civil wars. However, the two countries united behind Qatar during the 2017 diplomatic crisis and have worked hard to maintain a strong trade relationship despite political differences. Most recently, the relationship between Turkey and Iran seems to be on the upswing because of the shared concerns over both the ambitions of the Saudi-led Arab block and the long-term direction of American policy in the Middle East.

Turkey’s relationship with China represents surely the biggest wild card in its basic relations with the major competitors. Bilateral ties have been somewhat contentious on ethnic questions: Erdoğan has condemned the Chinese treatment of Uighurs, a Turkic Muslim minority in the Chinese province of Xinjiang. In 2015, tensions had boiled over because of reports that China had banned Uighurs from fasting during Ramadan, which provoked riots in Turkey. Yet these tensions have had a relatively minor effect on the relationship between the two nations. Trade and economic factors have instead dominated the attention of the nations’ leaders. China is now Turkey’s second-largest source of imports (after Russia) and bilateral trade has grown to more than $20 billion. China invested more than $3 billion in projects in Turkey in 2018 and 2019 and has ambitious plans for more. China has issued loans and economic relief, and the two countries are cooperating on multiple infrastructure projects under the umbrella of the Belt and Road Initiative. One result is a dramatic about-face on the issue of

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90 Toucas, 2018.
94 Galip Dalay, “Is There Really a Turkey-Iran Rapprochement?” Al Jazeera, September 13, 2017.
Xinjiang: More recently, Turkey has signed an extradition agreement with China and arrested hundreds of Uighur activists for deportation to China.99

Yet it is important to place China’s economic relations in context. Turkey is still overwhelmingly dependent on Europe for its exports—in 2018, it sent more than $100 billion in exports to Europe and Central Asia, and under $3 billion to China. Turkey exports three times as much to North America as to China.100 Its overall trade relations with China are thus heavily in deficit, with some $19 billion in imports. The proportion of Turkey’s inbound foreign direct investment coming from Europe actually rose between 2005 and 2018, and China’s significant efforts still comprised less than 1 percent of total foreign direct investment with Turkey.101

Turkey, at least under the current government, has been leaning on Beijing as a strategic counterweight to the United States and the EU but also Russia. China has the great advantage of being a massive economic partner, exactly what a Turkey with a contracting economy and rising national debt is likely to need in coming years. There are thus reasons to expect the relationship to continue to deepen. For historical and geographic reasons, however, Turkey remains far more dependent economically on Europe, and China will have a limited ability to fundamentally change this situation for a long time if ever. Turkey appears to be left in a position of trying to find a comfortable middle ground among the major competitors, without fundamentally shifting alignment.

**Saudi Arabia**

Saudi Arabia’s identity as a strategic actor is based on its status as a conservative monarchy, its religious character, and its opposition to and fear of Iran. Saudi Arabia has long sought to preserve the status quo in the Middle East and has aligned itself against revisionist powers.102

Following the 1979 revolution, the primary target of Saudi concern has been Iran. Under the current leadership of Crown Prince Mohammed bin Salman (often known as MbS), Saudi Arabia initially laid out a bold agenda for change, but its program of domestic reform and foreign policy activism has been rocked by a series of scandals, including the Saudi role in a civil war in Yemen, its effort to coerce its neighbor Qatar, and the assassination of Saudi journalist Jamal Khashoggi. It is not clear, however, that this turbulent period has fundamentally altered Saudi Arabia’s view of the main strategic competitors.

Saudi Arabia sees itself as the dominant regional power and as the leader of both the Arab and Muslim worlds, but the Kingdom’s strategic position will also be heavily influenced by the surprisingly difficult financial position in which it finds itself. Persistently low oil prices and continuing state obligations have generated a projected $50 billion budget deficit in 2018 and

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102 Turki al Faisal bin Abdul Aziz al Saud, “Saudi Arabia’s Foreign Policy,” speech at the 22nd Annual Arab-U.S. Policy-makers Conference, Washington, D.C., National Council on U.S.-Arab Relations, October 22, 2013. In a 2013 speech, a member of the royal family stated that Saudi Arabia’s goal was “to assist, in whatever way we can, in helping our neighbors maintain stability.”
have shaved off roughly one-third of the country’s substantial foreign reserves. The country is in dire need of reforms to generate a comprehensive economy.

At the center of Saudi Arabian politics is Crown Prince Mohammed bin Salman. The Crown Prince certainly has wide sway over Saudi foreign and domestic policy. At home, he has embarked on an ambitious modernization program known as Vision 2030. He also has gone about privatizing economic assets, diversifying the economy, moderating Saudi Islamic doctrine, ending the ban on women driving, and launching an anticorruption campaign that also serves to undermine his political rivals in the Saudi royal family. Internationally, the Crown Prince has been willing to go further than traditional Saudi checkbook diplomacy by actively intervening in such places as Yemen and Qatar.

Saudi Arabia’s first and most important foreign policy goal is to oppose Iran. Relations between the two countries have been referred to as a “Cold War,” and there is no doubt that Saudi leaders view Iran as an existential threat. Iran and Saudi Arabia have fundamentally different interpretations of Islam that go beyond the millennia-old split between Sunni and Shia. Ayatollah Khomeini, while the Shah was still in power, argued that, “Islam proclaims monarchy and hereditary succession wrong and invalid.” In the wider Muslim world, Iran attempts to outflank Saudi Arabia by portraying the Kingdom as a U.S. puppet and a false friend to Palestine.

These Iranian positions—and Iran’s efforts to encircle Saudi Arabia with proxies—strike at the heart of the al-Saud family’s legitimacy for rule. At home, Saudi Arabia worries about Iranian instigation of the restive Shia minority. Even if Iranian agents are not responsible for domestic discontent, repressive measures to keep that minority in line provoke reactions from Tehran. That dynamic recently played out after Saudi Arabia executed a Shia cleric in January 2016 who protested the Saudi government. In response, Iranian protestors ransacked the Saudi embassy in Tehran. Afterward, Saudi Arabia broke off diplomatic relations and halted flights and trade with Iran.

Despite the significant religious differences, a 2009 RAND report cautions that such differences have an “echo effect” but are not “the principal determinants in the policy outlook

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109 Religious pilgrims from Iran are still allowed to enter the Kingdom. Cahal Milmo, “Saudi Arabia Executions: Riyadh Expels Iranian Diplomats Amid Rising Shia and Sunni Tensions as Protests Erupt Across the Middle East,” Independent, January 3, 2016; and Angus McDowall, “Exclusive—Saudi Arabia to Halt Flights, Trade with Iran—Minister,” Reuters, January 4, 2016.
of each regime.” Instead, Saudi Arabia’s opposition to Iran is primarily driven by a belief in Riyadh that the Islamic Republic is fundamentally an expansionist and revisionist power determined to dominate the Middle East. The Crown Prince unflinchingly compares Khamenei to Hitler and likens Iran to Nazi Germany.

Saudi Arabia and Iran are on opposing sides of the civil wars in Syria and Yemen. A Saudi white paper placed emphasis on a quote from a senior Iranian official to Reuters: “Yemen is where the real proxy war is going on, and winning the battle in Yemen will help define the balance of power in the Middle East.” Although religious differences may not be the principal reason for hostility between Tehran and Riyadh, the factions supported by the two rivals in various proxy conflicts almost invariably line up along religious lines, meaning that Saudi Arabia and Iran tend to exacerbate sectarian tensions whenever they oppose each other.

Saudi fears of Iran are most manifest with regard to Iran’s nuclear program. Saudi royals have warned that Iranian acquisition of nuclear weapons would lead to a nuclear arms race, and the Crown Prince has specifically stated that Saudi Arabia would “follow suit as soon as possible” should Iran develop the bomb. Some public reports have claimed that Saudi Arabia is confident that it could quickly acquire nuclear weapons from close ally Pakistan. Unsurprisingly, Saudi Arabia opposed the Joint Comprehensive Plan of Action, and it feared not only Iranian nuclear progress but also the economic revival that would follow the lifting of sanctions.

Other Saudi foreign policy goals include opposing terrorism and weakening protest movements which might prove a threat to the regime. Fear of a regime change is baked into the Saudi system: The Kingdom’s military forces are split between the regular army and National Guard to forestall military coups. More recently, Saudi Arabia opposed the Arab Spring protests; the Kingdom even deployed forces through the Gulf Cooperation Council to Bahrain to quell the protest movement there. One commentator has described Saudi policy as a new “Brezhnev Doctrine” in which “no uprising will be tolerated in a neighboring kingdom.”

Saudi Arabia has always seen itself as the leader of the Islamic faith because of its geography and history; the title of the Saudi king is “Custodian of the Two Holy Mosques.” Now, the Kingdom wants to lead the Arab states against Iran, especially the other monarchies. Saudi Arabia proposed that the Gulf Cooperation Council, originally created to oppose Iranian and

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110 Wehrey et al., 2009.
113 Wehrey et al., 2009.
116 Poole, 2016.
120 Kingdom of Saudi Arabia, Ministry of Foreign Affairs, undated.
Iraqi revisionism, be transformed into a true union, although the proposal was rejected by the smaller states.121

For several years, the Crown Prince and the Saudi government took an aggressive, even bellicose approach to promoting these goals, playing a significant role in the Yemeni civil war, initiating a blockade against Qatar for perceived ties with Iran, inserting itself into Lebanese political dynamics, and more. By about 2019, it was apparent that many of these initiatives had been costly, in both resources and prestige, and there were signs that Riyadh was moving to temper its image and mend fences in the region—for example, by seeking an end to the war in Yemen. However, these steps have only partially restored Saudi Arabia’s image and remain a work in progress.122 That image was subsequently dealt a severe blow by the Saudi government’s complicity in the 2018 assassination of the journalist Jamal Khashoggi.

In pursuing these goals, Saudi Arabia has traditionally enjoyed a close relationship with the United States, its most important security partner and dominant source of military equipment and geopolitical reassurance. The relationship was tense under President Obama because of Saudi opposition to the Iran nuclear deal and desire for greater U.S. involvement in Iraq and Syria. Relations improved under President Trump because of his hostility to Iran and continuing arms sales: During Trump’s state visit to Saudi Arabia, he and King Salman bin Abdulaziz announced $109 billion in arms sales and a variety of counterterrorism initiatives.123 However, the U.S.-Saudi relationship was deeply injured by the fallout from the Khashoggi assassination and subsequent international probes of Saudi complicity. Partly as a result, President Joseph Biden has been more critical of the Crown Prince and Saudi Arabia’s human rights record than Trump was.124 Yet the United States and Saudi Arabia continue to share many regional and global interests: containing Iranian power, fighting terrorism and extremism, encouraging political stability, and preserving stable oil markets, and U.S.-Saudi strategic dialogues and official contacts continue.

The Saudi Arabian–Russian relationship is characterized by both tension and cooperation. Saudi Arabia opposes Russia in Syria and dislikes Russian ties to Iran.125 However, Saudi Arabia has taken a softer line on Assad in Syria after the successes of the Russian intervention there, and Saudi Arabia and Russia have started coordinating on oil production, an enormous step for Russia to take because it is not a member of OPEC and has traditionally spurned calls to lower oil production.126 The warming of Saudi-Russian relations was highlighted by a 2017 royal visit of King Salman to Moscow.127 However, new tensions flared in 2020


when Saudi Arabia, hard-hit by declining oil revenues during the COVID-19 pandemic and associated economic crisis, significantly increased production in part as a rejection of Russian demands for tightening supply. Rumors of possible Saudi arms purchases from Russia have not materialized.

Saudi Arabia’s relationship with China is predicated on the close economic ties between the nations. In 2010, Saudi Arabian oil exports to China overtook those to the United States, a trend that has continued as U.S. oil production has increased.\textsuperscript{128} In 2017, King Salman visited Beijing and signed $65 billion worth of trade deals, deals that fit into China’s Belt and Road Initiative.\textsuperscript{129} Saudi Arabia did express displeasure at China’s blockage of Security Council resolutions against Assad, but such disagreements have had little to no impact on the economic relationship.\textsuperscript{130}

Saudi relations with Russia and China are somewhat constrained by those countries’ close ties to Iran.\textsuperscript{131} Both countries have become deeply involved in Iran’s energy sector—in China’s case, discussing a long-term plan of hundreds of billions in possible investments in Iranian infrastructure—and have supplied weapons to Tehran. Both have criticized U.S. sanctions against Iran and appear to be actively investigating possible military basing options there. Given Beijing’s accelerating embrace of Iran, Saudi Arabia is likely to want to preserve other security guarantors.

In sum, Saudi Arabia’s essential perspective on the strategic competition is likely to remain relatively stable, based on a close security relationship with the United States and incorporating cooperation or economic and energy ties with Russia and China where possible. One wildcard for the Kingdom’s future is its economic and social prospects in an era of persistently low oil prices: Levels of $40 a barrel are only about one-half of what they need to be for the Saudi government to meet its revenue targets. The Saudi Crown Prince’s Vision 2030 program has so far produced little tangible diversification of the Saudi economy, and now there will be fewer resources to support major initiatives in that direction.\textsuperscript{132} If domestic challenges become a much more urgent priority for the government, Saudi Arabia could see potential Chinese energy and economic entreaties as much more essential. Saudi Arabia has been courting Chinese investment and has welcomed Huawei 5G technology in its information sector. China also offers something of an economic and political model for the Saudi regime—“economic liberalization with domestic repression.”\textsuperscript{133} Given the real and continuing Iranian threat, however, this is unlikely to produce a fundamental realignment,\textsuperscript{134} but rather a continued balancing of ties among the United States, Russia, China, and the EU.

Understanding the Emerging Era of International Competition Through the Eyes of Others

Summary of Perspectives of Regional Powers

The views of these states point to several general themes. First, these states, like the emerging democracies, are fundamentally status quo in their orientation, not seeking to upset the existing order. Vietnam is a member and active participant of all the major global and regional security and economic forums, to include the UN, World Trade Organization, International Monetary Fund, World Bank, and Association of Southeast Asian Nations, among others. Although Vietnam holds certain views on freedom of navigation under the UN Convention on the Law of the Sea that are at odds with the U.S. interpretation, these views are tertiary to the fundamental nature of the international system and not indicative of a country that would be considered “dissatisfied” with the global order. Similarly, although its recent trajectory has been concerning from the standpoint of democracy, Turkey has traditionally taken an active role in a plethora of international organizations.

Second, none of these states has any appetite for being drawn into an intense global competition. All would prefer to hedge and bide their time rather than throw their weight behind one or the other side of the competition, especially in Asia. Like the emerging democracies, some of these countries have deeply embedded concepts of nonalignment. Vietnam, for example, makes clear it will not become reliant on any outside power either to ally with or to balance against, as it did during the Cold War with the Soviet Union. Vietnam has adopted a consistent foreign policy approach of shunning alliances since 1990s. This policy is often referred to as the Three No’s policy, which states “Vietnam’s policy is no participation in military alliances, no foreign military bases located on its land and no foreign use of its territory against other countries.” Instead it seeks to create a web of multidimensional, intertwined interests with as many nations as possible.

Third, as with the major emerging democracies, there is no uniform tendency regarding hostility toward or competition with Russia, China, or Iran. Competitive dynamics are relationship specific. Turkey, for example, has historically viewed Russia as a security threat and has sought out Western powers for security guarantees. Turkey’s relations with Iran are characterized by alternating cooperation and competition on a wide host of issues that defy easy classification. Turkey’s relations with China are cordial on economic issues and contentious on ethnic questions. Saudi Arabia’s first and most important foreign policy goal is to oppose Iran—but its approach to China has been far more nuanced.

Fourth, the theme of domestic politics and its implications is common across many of these important regional powers and reflects a larger theme in world politics. Some countries, such as Turkey and Saudi Arabia, are undergoing significant domestic political transitions or upheavals that shape their view of their role in the world and the nature of the emerging era. These dynamics introduce significant degrees of unpredictability into their external policies and relations with all of the primary participants in the competition.
Our analysis has sought to understand the ways in which important global powers view the unfolding competition, especially in several key areas: Their general national identities, their objectives and strategies for the emerging era, and their view of other competitors. Several commonalities emerge from the perspectives surveyed in the previous chapters, patterns that have possible implications for the United States and the U.S. Air Force. In this concluding chapter, we summarize these common themes and lessons. Each item reflects perspectives and policies of at least several of the countries we examined in the study.

1. *The international system remains dominated by status quo powers.* The way these powers conceive of the status quo is preserving the postwar order and focusing on economic development—therefore, not all states in this category support every element of the postwar order as the United States defines it. Moreover, as noted earlier, the United States itself sometimes acts as a revisionist power and is perceived as such by many other states. But international politics remains characterized by a predominant group of states—from the United States to the EU, India, Japan, South Korea, Australia, and New Zealand, most of Latin America, Indonesia, and others—committed to integrated global trade, nonaggression, peaceful resolution of disputes, and international collaboration in shared challenges. To the extent that the United States can still provide leadership for this informal coalition and speak in its name, this role will provide tremendous competitive advantages in the overall competition.

2. *However, revisionist sentiments serve as drivers of a competition in many places beyond Moscow, Beijing, and Tehran.* Many other countries—including India, Brazil, Vietnam, and even France—believe that the postwar order has been excessively dominated by the United States and that the moment has arrived for a more equal sharing of power. Many of these states also see the United States as in the throes of relative decline and expect it to retrench significantly from its current global posture. Nonetheless, differences in the interests and outlook of powers dissatisfied with the current international system make it unlikely that world politics will see the rise of formal new blocs of states outside current alliances. Informal, issue-specific coalitions are a more likely form of alignment.

3. *The appetite for explicit or implicit cooperation with the United States remains strong.* Our research confirmed several places where governments believed that relations with the United States were strong and expressed a continued appetite for cooperation, countries including India, Indonesia, Mexico, and Vietnam. Relations with several of these countries have frayed in the past years, notably because of U.S. policy decisions. But if the
United States chooses, it has the foundation for a strong global network of cooperation as a leading competitive advantage.

4. **Perceptions about the degree of immediate threat posed by Russia and China vary significantly, and few countries are fully aligned with the level of global competitive intensity outlined in the current U.S. strategy.** Many countries agree with China’s basic position on sovereignty—they support respect for sovereignty over aggressive liberal value promotion in interventionist ways, prioritizing noninterference over value promotion. Moreover, there is a significant regional split in these views: In Europe, perceptions of the China threat remain weak though growing; in Asia, few consider Russia an immediate problem. In many cases, would-be U.S. partners in one competitive dynamic enjoy strong relations with other countries that the United States has now branded as threats to the international order.

5. **Several rising democracies underexpress their national power.** Yet some of them (notably India and Brazil) see themselves as increasingly important, and eventually preeminent, powers and increasingly will be looking for the influence and voice that come with such status. Therefore, a major geopolitical priority for U.S. strategy is to encourage added power expression by value-sharing democracies and help shape its character—while recognizing that the ways in which these countries flex their muscles may not always accord with U.S. preferences.

6. **All major powers in the international system outside our set of challenger states want to preserve the postwar, rules-based order, which they perceive as being very much in their interests.** Some middle and smaller powers explicitly indicated a desire to see large democracies apart from the United States (e.g., India and Japan) take a greater leadership role in sustaining the order. However, many have integrated the preservation of a rules-based order firmly into their national security strategies and believe that it helps them preserve their core interests. There is a consistent desire outside Europe (and, to some degree, the United States) to reaffirm an essential aspect of the UN system, which is noninterference in sovereign affairs. The drive to establish such policies as the Responsibility to Protect, and the occasional U.S. and European advocacy of interventions based on humanitarian grounds, appears to have exceeded the willingness of many states to support them. Sustaining multilateral support for the core norms of the order will require a careful balancing act on these issues.

7. **Arguably the most common medium-term ambition on the parts of both challengers and rising powers is a thirst for status—for the country to affirm or reestablish its “rightful place” in world politics.** This is true of both the challenger states (such as China, Russia, and Iran) and many emerging democracies (such as Brazil). This impels the competition toward contestation of leadership over issues, institutions, and regions rather than over territory.

8. **Aggressive, quasi-revisionist states generally favor action below the threshold of major conflict and the use of nonmilitary tools of statecraft to achieve their ends.** Doctrines and concepts promoting this idea are common to Russian and Chinese national security debates, and the recognition of this trend is common to the national security strategies of several major powers.

9. **Domestic affairs are driving international posture in powerful ways in many countries.** This is a combination of populism, nationalism, domestic economic considerations, and, in some cases, political instability. Some countries are largely focused inward, such as the
United Kingdom, Germany, Mexico, Brazil, and Indonesia. As a result, in part, there is significant flux in the domestic profiles of several important strategic actors, including Germany, Mexico, Turkey, and Saudi Arabia. Each has new or shifting leadership or governing coalitions that could place the countries on significantly new paths in the months and years ahead. These dynamics mean that the overall strategic picture, including the alignment of key countries, will be uncertain and volatile for the foreseeable future.

10. *There is a profound allergy to alliances among most of the emerging nations, including India, Indonesia, Mexico, Brazil, and Vietnam.* All of them have principles of autonomy and independence embedded firmly in their identities and national security doctrines. For this reason and others, the United States is likely to be frustrated in the degree of direct support it will get. Many states have more-limited views of what they can and should do in response to emerging competitive dynamics and feel constrained by the coercive leverage of China or Russia. They want to push back against gray zone aggression but without causing escalation. All states desire U.S. partnership and support, but no current nonallies want to be forced into a position of being too close to the United States or being “forced to choose.” Yet, by the same token, these views also limit the degree of influence China or Russia is likely to achieve with these countries: There are natural constraints on the regional power these countries can attain.

11. *National security strategies and perspectives of many countries emphasize the importance of becoming key nodes or hubs of networks.* Establishing such a role—in economic, technological, educational, military, geopolitical, cultural, or other terms—is the focus of many countries’ strategies, whether explicitly or not. One classic U.S. competitive advantage is that it has served as such a hub of the entire postwar order. This specific form is beyond the scope of this report, but the United States would be well-served to pursue additional thought and analysis of the ways network effects could be brought to bear for competitive advantage.

These findings add up to two overarching themes. First, the form of competition emerging so far is what could be described as *constrained or restrained competition*—clearly intensifying but still constrained by barriers of the risks of escalation, the gravitational force of an integrated and interdependent global economy, a preference among challenger states for gaining advantage short of war, and perceived international norms. The role of nuclear weapons and the potential for nuclear escalation are core elements of these restraining dynamics, creating a different situation than existed in earlier periods of great-power rivalry. A primary U.S. goal should be to sustain and strengthen these constraints on more-intense competition.

A second main theme is that many of the sources of power in this persistently interdependent, networked international system will come from serving as the hub of various networks. Many states already perceive a competition in this regard, one in which the United States now enjoys the status as the dominant “hub” in such areas as international financial transactions, international monetary issues, internet governance, and much more. Our research on the perspectives and policies of many key players in the competition suggests that competitive advantage will continue to come from serving as such a hub, in general and on specific issues.

The final question is, how can defense capabilities—and specifically U.S. Air Force capabilities—serve these two goals? Specifically, in what ways can they help strengthen constraints on more intense competition and contribute to making the United States the domi-
nant hub (or, as an earlier National Security Strategy once put it, the “partner of choice”)? This analysis suggests several specific implications for the U.S. Air Force.

1. **Security assistance and military-to-military engagement remain important.** Although its effects cannot always be quantified, the broad suite of tools and activities under the general rubric of U.S. security assistance has historically been an important tool for placing U.S. power at the center of bilateral and multilateral ties that add up to potential global networks of friends, allies, and partners. Our analysis suggests that such an approach remains viable and can continue to provide the United States with competitive advantages. It is common to view the leading implication of strategic competition as a renewed emphasis on gaps in regional warfighting capability. Refreshing such capabilities is an important objective, but it should not detract from the continued importance of efforts to build and sustain relationships with partner militaries, enhance their capacity, and cement alliance ties. The competitive advantage the United States gains from its strategic partnerships is at least as important, all things being equal, than the advantage it has from operational excellence.

2. **The U.S. Air Force would be well-served to deepen partnership arrangements with a handful of specific emerging regional powers.** This is true of U.S. defense policy in general, but the Air Force can identify those countries that fall into this category and place emphasis on developing their air forces. India (despite the constraints and its traditional relationship with Russia) is an obvious candidate, as are Brazil, Indonesia, and South Africa. Even if the cooperation can only be enhanced at the margins, it could provide an important boost for U.S. geopolitical initiatives.

3. **Strengthening the service’s suite of tools for the gray zone should be a priority.** Challenger states hope to play out their aggressive designs below the threshold of major conflict, and many other states explicitly expect this to be the center of gravity of the competition. Our analysis of both the challenger state strategies and the concerns voiced by targets of their influence-seeking activities suggests that these tactics are likely to remain a centerpiece of the U.S. competition with both Russia and China.

4. **Air Force engagement activities should be prioritized based on criteria beyond those associated with high-end conflict.** In considering which potential partners should rise to the top of priority lists for security assistance and other forms of engagement and partnering, our analysis—as well as the broader assessment of the emerging strategic competition in this project—suggests that the Air Force should consider a range of factors. Much of the emerging competition will be played out below the level of major war. Were the Air Force to prioritize countries solely on the basis of their prospective ability and will to share the burden of such high-end fights, it would lose potentially important roles in lower levels of competition.

5. **The Air Force’s capacity for over-the-horizon deterrence is likely to be increasingly in demand.** Many regional countries want the United States to support them and be ready when called upon—but do not want excessive U.S. local presence. The classic U.S. model of regional warfighting, which might be described as “hold and reinforce,” is likely to become less and less relevant given the combination of other powers’ technological capabilities and doctrinal innovations. Finding a new solution is likely to demand a form of over-the-horizon balancing that should play to Air Force capabilities.
6. *To the degree possible, the Air Force should work to strengthen military-to-military ties with Russia and China.* U.S. friends and allies do not welcome unconstrained confrontation, and signals that the United States is working to avoid direct conflict even as it competes will be important to sustaining support for the overall U.S. strategy. These enhanced ties could be consultations of regional component commanders, visits of service chiefs, enhanced rules of engagement in service domains (in this case, air intercepts), collaboration on humanitarian operations, or efforts to foster contact in military education (if the overall relationship allows). Therefore, the U.S. Air Force has the opportunity to contribute in important ways to U.S. strategies for the emerging competition. Because of the increasingly multipolar character of that competition and the competitive advantage that the United States gains from friends, allies, and partners, those contributions emphasize the service’s role in security cooperation, engagement, partnerships, and the core role of warfighting. Our analysis suggests that recent efforts in the Air Force to modestly enhance these engagement-related capabilities could become important investments in competitive advantage.
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The U.S. National Security Strategy is built around the expectation of a new era of intensifying international competition that the United States is expected to confront. Yet there is little rigorous analysis of what such an era might look like or how it might unfold. This report is the second describing a study in which researchers evaluated the emerging strategic competition, focusing on the relevant views and policies of key countries around the world (China, India, Russia, Germany, Japan, Brazil, Indonesia, France, United Kingdom, Iran, Australia, Mexico, Vietnam, Turkey, and Saudi Arabia). This report presents the findings from the second part of that overall study—an evaluation of how the competition looks through the eyes of other major powers, beginning with the primary challengers to the U.S.-led international order. The authors sought to deepen the thinking about the nature of the emerging strategic competition by focusing on the roles and perspectives of the states that will conduct it. This report describes four basic elements about each major actor. Four categories of countries are considered: challenger states; U.S. allies; global emerging democracies; and other key actors. The report examines the essential character of the actors; their goals, principles, and grand strategy; their views of Russia, China, and Iran; and their relations with the United States. It concludes with several general lessons from these perspectives.