Chapter 12

The Global South
Africa and the Middle East

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This chapter continues the volume's focus on the key regions of the Global South by discussing Great Power competition effects on Africa and the Middle East. It demonstrates how the Great Powers are engaged in an increasingly intense and dynamic competition across these two regions with varying degrees of success. Russia and China are pursuing different strategies toward Africa and the Middle East, but their engagements have a similar effect of bolstering authoritarian regimes and undermining U.S. and European influence. Through commercial, financial, political, and military engagement, China and Russia aim to accelerate a gravitational shift in Africa and the Middle East from the West to the East. At mid-decade, Beijing increasingly features Africa and the Middle East in its efforts to reshape the global system to advance China's national interests and setting standards in digital governance and data security as well as telecommunications, artificial intelligence, quantum computing, and other advanced technologies. Under the Joseph Biden administration, the United States began to recognize the intense focus of China in these important regions of the Global South and started to counter Beijing's regional initiatives that clearly threaten U.S. interests by working with coalitions and partnerships featuring prominent roles for India, the European Union, and to a lesser extent Japan. Should Washington choose, American-led, pro-Western collaboration could provide steady and consistent alternatives to persuasive Chinese financial advances, increasingly resonant Chinese and Russian anti-Western propaganda, and ongoing Russian and Chinese grooming of the region for expanded private military contractor, paramilitary, and military access. As the Donald Trump administration begins a second term at mid-decade, it is unclear if American policy will choose to sustain such a partners-and-allies approach in Africa and the Middle East.

Adjacent but very different, the continent of Africa and the region of the Middle East matter greatly in the unfolding Great Power competition (GPC) among the United States, China, and Russia. There are 54 fully recognized states in Africa and another 15 in

the "core" Middle East region where southwest Asia touches Africa and Europe (see figure 12.1).[1] Much of this area's overarching geostrategic importance has to do with the location near major ocean shipping lanes, including the Hormuz Strait, the Suez Canal, and the Bab-el-Mandeb (see figure 12.2).[2]

Another element of geostrategic importance in Middle East and African countries are their rich endowments of natural resources. Fossil fuels and minerals lead the list of natural resource riches in these regions. Five Middle Eastern countries (Iran, Iraq, Kuwait. Saudi Arabia, and the United Arab Emirates [UAE]) are among the top ten global oil producers accounting for 26 percent of global production in 2023.[3] African states also serve as important sources of global oil supplies, including Algeria, Angola, Libya, and Nigeria.[4] Five of the top ten global liquified natural gas exporters in 2023 also were from the wider region—five in Africa producing four percent of global exports and Qatar in the Middle East producing four percent of global output.[5] African states have the largest overall mineral reserves in the world, including vast deposits of highly coveted cobalt, neodymium, praseodymium, and dysprosium.[6]

Africa also has one of the fastest growing consumer markets and is projected to have 1.7 billion consumers by 2030 and potentially 2.4 billion by 2050. Middle Eastern consumer markets, particularly those in the Arab Gulf States for mobile commerce and luxury goods, are forecast to expand rapidly for the rest of the 2020s.[7]

These features of Africa and the Middle East make them important regions for the intensifying contest among the United States, China, and Russia. Over the past two decades, China has become the top economic partner for most countries in these regions. China's engagement in the Middle East and Africa during the 2000s and the 2010s focused on gaining access to natural resources and constructing major infrastructure projects. Since 2013, many of China's infrastructure and development initiatives in Africa and the Middle East have conceptually fallen under the program known as the Belt and Road Initiative (BRI).[8] Over time, China is also becoming a significant source of foreign direct investment, technological cooperation, and foreign aid for many countries in Africa and the Middle East.

Through the BRI and other foreign policy tools such as multilateral cooperation forums with African states (Forum on China-Africa Cooperation, FOCAC), Arab states (China–Arab States Cooperation Forum, CASCF), and bilateral strategic partnerships, China has grown a commanding position for political influence. Across these mechanisms, China highlights shared interests with many countries in these regions promoting a strict interpretation of sovereignty, nonintervention, and noninterference. China's narrative also emphasizes the claim that unlike the U.S., it too is a developing country and thus one that could assist establishing a greater voice for developing countries in the international system through South-South cooperation.[9]

In contrast with its economic and political footprint, Chinese military and private military contractor (PMC[10]) access in the Middle East and Africa is growing but still quite limited.[11] At mid-decade, China's ascent is being critiqued by some local actors and challenged by greater competitive programs from the United States and its partners. Over the past decade, especially after the COVID-19 global pandemic, worries about the level of debt owed by Africa countries to Beijing is growing.[12]

Since the launch of BRI, China has been working to counter the negative regional publicity that has grown up around some of its infrastructure projects and loan repayment terms and conditions.[13] Beijing also has turned to a more organized and strategically driven approach for its economic relationships in the states in the Global South, including Africa and the Middle East. As noted in chapter 4a, China at mid-decade has an explicit aim at developing strategic leverage across the wider sweep of Africa and the Middle East. Between 2021 and 2024, Chinese President Xi Jinping laid out a three-vector strategy to forge a global "Community of Common Destiny" by improving Chinese economic, diplomatic, and security outcomes from its overseas development activities and diplomatic overtures. Xi's programs to achieve these goals are the Global Development Initiative (GDI), Global Security Initiative (GSI), and Global Civilization Initiative (GCI).[14]

Although China's economic and political interests in Africa and the Middle East are growing, there is little evidence at mid-decade that Beijing seeks to play a significantly larger security role in either region anytime soon. The PRC remains unwilling and unable to provide the same security guarantees as the United States in these regions. Beijing desires a stable Middle East and Africa but as of mid-decade is willing to rely on other Great Powers to ensure that stability.

Compared to China and Russia, the United States traditionally has been more focused on extending security for the purpose of maintaining stability across Africa and the Middle East—mainly in opposition to nonstate terrorist and radical groups over the past quarter century. Recent focus on these regions has been toward wars in Iraq and Syria, fighting terrorist groups like al Qaeda and the so-called Islamic State and preventing Iran's development of nuclear weapons. Thus, Washington barely monitored and rarely challenged Chinese economic and political inroads and infrastructure development. But as the global rivalry between the United States and China grows more intense, the United States has begun taking a more proactive approach toward Africa and exhibited renewed vigor in working with Middle Eastern and African states. The United States has been looking to minimize its potential vulnerability from Chinese political and security interactions with Middle East and African regimes. It seeks to preserve political influence in these regions and prevent the transfer of American military technology to China via U.S. security partners. In Africa, the United States has begun to enhance its policy focus on broader economic and foreign aid initiatives.

Like the United States, the European Union (EU) has begun looking for new strategic partnerships in Africa to reduce economic dependency on China to offset its fossil fuels dependence on Russia after Moscow invaded Ukraine in early 2022 and to limit illegal immigration and unmitigated climate change. The United States also is working with Japan and India to compete with China and reduce Beijing's rapidly growing influence on the African continent and its favorable access to the Middle East.[15] The United States has promoted its role as a net security provider for many states across these regions and especially as a protector of the vital sea lines of communications (SLOCs) there.

Russia's approach toward Africa and the Middle East aligns with Vladimir Putin's consistent aim that Russia be viewed as a globally influential Great Power. In recent years, Russia has expanded its security footprint and reinforced propaganda efforts across the Global South with a focus on discrediting and dislodging former European colonizing

states and the United States from privileged positions across Africa and the Middle East.[16] By so doing, Moscow has aligned itself with a wide range of authoritarian regimes and movements united mainly by the desire to limit Western influence in their countries. From Syria and Libya to the African Sahel and onto Mozambique, Russian-affiliated military auxiliaries, mercenaries, and private military contractors have played a role in efforts to counter terrorists, protect dictators, and extract billions of dollars from the illicit mining and export of oil, gold, and other rare minerals.[17] While Russia has faced setbacks in many of these places, it has been able to project power and influence at relatively little cost. On one hand, the war in Ukraine has forced Russia to pull back resources from regions it considers "peripheral." Yet the war has also provided an opportunity, as Moscow has turned to states like Saudia Arabia, Turkey, the UAE, and others for trade, financial services, and even as destinations for Russian out-migration.

In Africa, Moscow also promotes itself as an advocate for "traditional" social and family values, allegedly opposed to those it portrays as a feature in decadent Western democracies.[18] In this information venture, Moscow's program complements China's targeted messaging across the Global South that Western morals and values are hubristic and disrespectful to the cultural histories of the local populations. Moscow and Beijing advance in parallel an anti-American and anti-liberal narrative focused on the right of states and peoples across the world to choose their own development paths. By many indicators, this narrative seems to be developing traction across much of Africa, the Middle East, and elsewhere around the Global South.[19]

Moscow and Tehran have considerably expanded their military-technical cooperation since the early 2022 start of the Russia-Ukrainian war. Russia has received Iranian combat drones, artillery shells, small arms ammunition, and glide bombs. Although Moscow began domestic production of Iranian Shahed drones in 2024 and has secured additional military supplies from North Korea, it will continue to rely on the transfer of Iranian weapons systems beyond 2025. In return, Russia has aligned itself more openly with Iran's strategic ambitions, supporting Iranian membership in the Shanghai Cooperation Organization (SCO) and BRICS (Brazil, Russia, India, China, and South Africa), backing the activities of Iranian proxies (including the Houthis in Yemen and Hezbollah in Lebanon), and turning a blind eye to the advancement of Tehran's nuclear program. It has also agreed to supply Iran with advanced weapons capabilities, including advanced Su-35 combat aircraft. If it is fighting Ukraine, Russia will want to ensure that Tehran can help replenish its stocks while also partnering with Moscow in developing new drone variants.[20]

Despite their concerns about Iran and the burgeoning Russo-Iranian partnership, Israel and many of the region's Sunni-majority states have adopted an equivocal position on the Ukraine war. As in Africa, most Middle Eastern governments do not see the war in Ukraine as their fight, view the West's call to oppose the Russian invasion on moral grounds hypocritical alongside Western support for Israel's war in Gaza, and seek to take advantage of the conflict for their own ends.[21] Russia's coordination with the Middle East Gulf states in OPEC+ has allowed Moscow to sustain some leverage over the oil market. The UAE has emerged as a crucial conduit for Russian efforts to evade sanctions imposed by the United States and its European partners in response to its invasion of Ukraine.[22] Moscow also has leveraged many Middle Eastern states' reliance on Russia (and Ukraine)

as suppliers of grain and other agricultural commodities to discourage them from openly supporting Ukraine on the basis that doing so would only prolong the war and drive up prices. Along politico-diplomatic as well as economic, ideological, informational, and military dimensions, the United States, China, and Russia are engaged in a mosaic of rivalrous and competitive activities across Africa and the Middle East.

This chapter establishes the major features of this intensifying Great Power competition as of early 2025. First, it details the major regional contours and competitive stakes. It then defines U.S., Chinese, and Russian interests and strategies to succeed in intensifying GPC. Next, the chapter describes the capabilities and resources the three Great Powers bring to the competition in this region, evaluating how the tools available to each will influence the trajectory of GPC there for the remainder of this decade. The chapter then undertakes some detailed analysis of the role and influence of two nation-states with an important role across these regions: India and Japan. The chapter provides a summary and forecast for the most likely evolution of GPC across these regions and concludes with an assessment of the way Africa and the Middle East fit into the wider fabric of intensifying Great Power competition across the Global South for the remainder of the decade.

Chapter authors acknowledge that several states located within these regions have outsized influence across the sweep of Africa and the Middle East. Turkey is one of these major state actors with an exceptionally strong diplomatic and military presence in Africa—including its biggest embassy in the world in Somalia, where it also runs the main port and airport.[23] South Africa is another state with super-regional influence in the African Union and as an early member of BRICS.[24] Saudi Arabia, Qatar, and the UAE have expansive economic engagements and geostrategic interests across Africa as well as the Middle East.[25] The Israel-Iran rivalry has global dimensions. This chapter's space limitations do not allow for an expansive discussion of the roles of these other states and focuses on the United States, China, and Russia in these regions.

Regional Contours, Context, and Stakes

Africa

Africa was a prime location for Great Power competition during the Cold War, mainly between the United States and the Soviet Union, although China played a role in championing African anti-colonial liberation movements.[26] In the century before that, Africa was a region of intense competition among Western powers to acquire colonies to capture mineral riches, economic markets, and security gains. After almost three decades without overt GPC rivalry, Africa is again the object of competitive interest among three Great Powers.[27] Although GPC between the United States and its two near-peer rivals in Africa today may not seem as intense as in Europe or the Indo-Pacific region, and even as much less prominent than during the Cold War there, Africa is increasingly important to the Great Power ambitions of Moscow and Beijing. China and Russia view Africa as a key region of the Global South, where American power and presence can be weakened for international strategic advantage.[28]

Great Power competition across Africa is focused on economic exchange, diplomatic influence, and military access. First, Africa demonstrates promise to become a pivotal loca-

tion for trade and commerce by the dawn of the next decade. Africa's population will reach 2.5 billion by 2050, constituting a quarter of the world's populace. The median age across the continent in 2023 was 18, 14 years younger than any other region. These factors portend that the African middle class will grow to more than 1.1 billion by 2060, up from 355 million in 2010. African Internet users will increase from 520 million in 2021 to over 850 million by 2030. As early as 2030, Africans are expected to comprise $3 trillion in aggregate consumer spending. The continent is home to 9 of the 20 countries that the International Monetary Fund (IMF) projected to experience the fastest growth rates in 2024.[29]

The African continent also is vital to future global supply chains that rely on critical minerals. Africa boasts 30 percent of the world's critical mineral reserves, including many of those vital for global energy transition:

- 48.1 percent of cobalt
- 47.7 percent of manganese
- 21.6 percent of natural graphite
- 5.9 percent of copper
- 5.6 percent of nickel
- 1 percent of lithium
- 0.6 percent of iron ore.

Congo alone sits on 70 percent of the world's cobalt. Global demand for rare earth metals is expected to reach 315,000 tons by 2030, more than double the volume in 2021. African countries with natural resources and strategically important locations are becoming the largest venues for GPC.[30]

With 54 countries—and more than 25 percent of the votes in the 193-member United Nations (UN) General Assembly—African states have an important role in global political and diplomatic initiatives. Between 2003 and 2018, Chinese diplomacy convinced Burkina Faso, Liberia, Malawi, Senegal, and several other African states to switch their diplomatic recognition from Taiwan to the PRC, leaving Eswatini as the only African country recognizing Taiwan.[31] Since 2022, African countries have repeatedly shown their ambivalence toward Russia's invasion of Ukraine, frequently voting against Russia in the UN General Assembly, but refusing to condemn Moscow formally, and frustrating Western calls for uniform diplomatic sanctions against Russia.[32] In 2023, the G-20 invited the African Union to join.[33]

Security and defense dynamics in Africa are noteworthy. Armed conflicts in Africa surged dramatically in the early 2020s, and 2023 featured more than in any year since at least 1946.[34] At the same time, the footprint of Great Power basing access and military interoperability has significantly evolved. The United States and France are today stressed in their efforts to continue long-standing counterterrorism and counterinsurgency programs across the continent, while Russia's paramilitary, mercenary forces, and private military corporations have expanded a small but increasingly influential presence there. Simultaneously, China has been converting its economic and infrastructure development activities into enhanced logistics presence and transportation access at strategically important African ports, airports, and military headquarters.[35]

The Middle East

The Middle East has been a conspicuous geopolitical prize in the history of global Great Power competition. As noted, it is home to critical ports and waterways at the vital crossroads intersecting Europe, Africa, and Asia—most critically the Hormuz Strait, the Suez Canal, and the Bab-el-Mandeb. Although cursed with an inhospitable climate and serious security dilemmas among rival countries and religious communities, the Arabian Peninsula also is a potential land bridge between Southern Europe and Asia Minor. Thirty-one percent of global oil production comes from the Middle East, and five of the top ten global producer states are found there.[36] Middle East countries produced about 18 percent of global natural gas in 2023 but are projected to generate a full 30 percent of the increasing global demand anticipated between 2024 and 2050.[37] The Middle East also has the potential to become a major supplier of the critical minerals and metals essential for the global transition to clean energy alternatives like batteries, solar panels, and wind turbines.

The Middle East is a critical crossroads for the global financial system. The region's extensive fossil fuel exports account for a substantial amount of global trade. Since World War II, that trade has mainly been denominated in U.S. dollars—contributing to the "exorbitant privilege" of the dollar in American global prestige and influence.[38] Since 2016, Chinese and Saudi officials have discussed moving a portion of their trade from dollar-denominated oil contracts to yuan-denominated ones. The Saudis might use yuan proceeds to directly pay for the extensive and expanding Chinese infrastructure projects across the Kingdom, eliminating the conversion costs from petrodollars to yuan.[39]

The complex security mosaic across the Middle East remains the most pronounced regional factor facing the Great Powers there at mid-decade. The animus between Iran and Israel and the decades-long security dilemma between regional rivals Iran and Saudi Arabia continue to vex external efforts to mediate regional security and stability. The Palestinian-Israeli conflict remains intractable and the Israel-Hamas war that began October 7, 2023, stoked a broader regional war between Israel and Iran and Iranian proxies during 2024 that must ultimately affect the strategic interests of the United States, China, and Russia in ways that remain to be determined.

The accelerating Sino-American rivalry in the Indo-Pacific region renewed Washington's long-standing desire to reduce its Middle East security footprint while encouraging greater political-military security collaboration among the region's main opponents of Tehran: Israel, Saudi Arabia, and the other Gulf Cooperation Council countries as well as Turkey.[40] Washington made a step in this direction by brokering the 2020 Abraham Accords, featuring two agreements wherein the UAE and Bahrain (followed a few months later by Morocco) recognized Israel's sovereignty and established full diplomatic relations.[41] The American aim was that these bilateral agreements would erect the scaffolding necessary for Israel and Saudi Arabia to begin substantive talks toward normalization. Like the first Trump administration, the Biden administration hoped to have the Saudi-Israeli-U.S. triangle become both the bulwark for security against Iran and stability across the Middle East for years to come.

But ubiquitous Middle East crises intervened in October 2023, freezing normalization talks and plunging the region into an accelerating round of tensions between Israel and not only the Palestinians but also Iran and Tehran's other regional military surrogates (for

example, Hezbollah and the Houthis). Moreover, these crises drew additional U.S. military assets into the region that Washington wished it could instead apply in the Pacific.[42] Whether the Palestinians instigated the Gaza war to sabotage Israel-Saudi normalization or not, the fate of Israel-Saudi normalization over the last half of the 2020s will reverberate beyond the Middle East with implications for Great Power strategies and resources allocations around the world.

GPC Interests and Strategies

This section defines the strategic interests and competitive focus of the Great Powers in Africa and the Middle East. It describes how each Great Power has evolved policies and strategies for these regions during the early 2020s. Whenever feasible, the section directly references the strategic documents or leadership speeches that establish the state's strategic aims and objectives. The section also indicates how each Great Power plans to fulfill its strategic objectives across Africa and the Middle East over the next half-decade.

China

China's most significant interests in the Middle East and Africa are to access resources and markets and to build political support for PRC positions and behavior within its own borders and on the international stage.[43] China's economic interests have long been dominant, but its strategic interests in political influence are growing more pronounced.[44]

China's long-standing interest in these regions is to acquire resources and markets for Chinese goods and services. In 2022, China's trade with the Middle East was close to $500 billion USD, and its trade with sub-Saharan Africa was valued at $245 billion USD. At close to $750 billion USD combined, Chinese trade with these regions exceeded bilateral trade between the United States and China that year at $690 billion USD. It also was substantially more than U.S. trade with these regions ($110 billion USD with the Middle East, and $42 billion USD with sub-Saharan Africa).[45] At mid-decade, these two regions account for roughly 67 percent of China's oil imports (56 percent from the Middle East and 11 percent from sub-Saharan Africa).[46] Qatar alone accounts for 15 percent of China's global natural gas imports. China also imports a wide range of other minerals from Africa, and citizens on the continent are important consumers of Chinese goods and services.

The Middle East and Africa are also important destinations for Chinese investment, services, and increasing technological cooperation in a wide range of sectors, including green energy, nanotechnology, biological research, digital technology, and artificial intelligence.[47] In many ways, China views these regions as exceedingly important markets for current and future Chinese goods and services. Economically, these regions are much more significant for China than for either the United States or Russia.

As China's economic presence in these regions grows, so does its desire to protect its citizens and businesses in the Middle East and Africa from terrorism, kidnapping, and other threats. It also wants to ensure that states in these regions do not support Uyghurs or other minority groups within China's borders that the PRC views as a threat to its own domestic security.

China's aim to develop support for its positions in the international system from countries throughout the Middle East and Africa also drives its behavior. These are important

regions to support China's stance on sovereignty and to push back against the spread of liberal political norms in the international system. In addition, China wants to ensure that countries in these regions do not criticize its domestic actions in Xinjiang, Hong Kong, or elsewhere.

Beijing also has an interest in advocating for developing country causes. These countries are important partners in China's efforts to unite the countries of the Global South. Historically, during the Mao Zedong era, China saw itself as a leader of the Third World. During the post–Cold War era, China continues to see itself as a leader of the developing world, now often referred to as the Global South or the Global Majority. One key aspect of its strategy in these regions is to highlight shared interests with states, including sovereignty, South-South solidarity, and a greater voice for developing countries in international institutions.

As relations between the United States and China and China and Western Europe sour, the relative economic and political importance of the Middle East and Africa for China's global strategy is increasing. If Beijing's relations with the West fully rupture, the Middle East and Africa will become key for the PRC's continued economic prosperity and prominence in the international system.

Compared to its economic and political interests in the Middle East and Africa, China's security interests are minimal. Beijing wants to foster the ability to protect its own citizens and businesses in these regions and fears that wider regional war could threaten its economic interests. That said, Beijing has a deep aversion to alliances and views significant involvement in regional security issues as detrimental to its broader interests in these regions.

The United States

Slow off the mark, the United States came to understand during the early 2020s that a strategically important 21st-century competition for stature and influence across Africa was underway. Late in the first Trump administration and especially during the Biden administration, Washington confronted the fact that Russia and China had been ramping up strategically important economic, political, and security activity across the continent while the scaling back of U.S. counterterrorism commitments reinforced African perspectives that the United States was generally disinterested and disengaged.[48]

Centuries of Western imperialist policies from slavery and colonialism to Cold War support for undemocratic regimes in the name of anticommunism largely receded as a basis for African grievance against U.S. policy there in the early 2000s. But by the mid-2020s, challenges like climate change, debt distress, and pandemic response and recovery were filtered through anti-Western propaganda from Moscow and Beijing and contributed to a resurgent view by many Africans that these problems originated from or were made worse by powerful, developed nations like the United States imposing unfair costs on Africans.[49] The return of GPC to Africa features increasing Russian and Chinese activity requiring deeper U.S. engagement that avoids reinforcing perceptions of Western paternalism or dismissiveness. To promote stability, good governance, and economic openness in Africa while countering the illiberal influence of competing powers, the Biden administration explicitly recognized the need for a regional strategy to better address transnational threats.[50]

The United States remains a prominent humanitarian aid donor and the most engaged military actor in Africa, but China's and Russia's activity levels and influence-seeking there have grown markedly since 2010.[51] To counter its GPC rivals, the Biden administration's 2022 National Security Strategy recognized the great and growing importance of Africa to the emerging world order. It promised to work with African countries as equals to build better continental security, stability, and growth and to encourage African states to take a rightful role on the world stage.[52] A complementary 2022 Strategy for Sub-Saharan Africa promised to elevate U.S. emphasis on bilateral and multilateral partnerships across Africa that prioritize innovation and African-established priorities that tackle shared global challenges and emphasize a more connected, urban, prosperous, and youthful region.[53] The 2022 National Security Strategy also called out the "destabilizing impact" of the Russia-backed Wagner Group private military corporation and promised to work with African partners to responsibly counter increasing continental terrorism and long-running intrastate and interstate conflicts.[54]

A historic December 2022 U.S.-Africa Leaders' Summit brought 50 African heads of state to Washington, DC. There, President Biden asserted that "America is back."[55] Yet many African leaders responded with skepticism because American economic interactions with the continent were relatively minimal, especially when compared to China. The new infrastructure dotting the continent's fast-growing national capitals bore few American flags, and smartphones in the pockets of African youth were mostly $100 Huaweis, not the $1,000 Apple model. By mid-decade, even America's long-standing soft power cultural and ideological advantage exhibited relative decline as U.S. movies and songs that used to dominate Africa's cultural landscape increasingly gave way to Chinese blockbusters and award-winning, locally produced music content.[56]

In the Middle East, the United States has numerous enduring strategic interests. Among these are countering terrorist organizations, ensuring the free flow of and access to natural resources (notably, energy), promoting regional stability and mitigating threats to partners and allies, maintaining long-standing U.S. relationships, protecting Israel, and preventing the rise of a nuclear Iran. The United States has sought to promote peace processes and conflict resolution in intrastate and interstate conflicts in the region, deter Iran, counter violent extremist organizations, and maintain freedom of navigation in key waterways across the Middle East, such as the Hormuz Strait, the Suez Canal, and the Bab-el-Mandeb.[57]

Although the U.S. military presence in the Middle East has consistently declined over the past decade, America remains the dominant security partner for most regional states. Washington sought to scale back this presence in the early 2020s by encouraging greater collective security interactions between the states of the region. The 2022 National Security Strategy stated American strategic objectives in the Middle East as those of supporting de-escalation of tensions and promoting greater integration there.[58] Under the Biden administration, U.S. strategy aimed to promote regional integration by building political, economic, and security connections between and among America's regional partners—those subscribing to the standing rules based international order including human rights—seeking to develop integrated air and maritime defense structures that substitute for U.S. military presence and that allow Washington to work for regional stability and development with diplomacy first instead of military might.[59]

Russia

The Kremlin's interests in Africa are mutually reinforcing. At a time of deepening strategic competition with the United States, the extension of Russian influence across Africa allows Moscow to escape diplomatic isolation by deepening and expanding commercial, political, and security ties with Africa's business and political elites. Africa has become a source of new markets and commercial opportunities for Russia (especially in those areas where Russia has already established a market advantage, including energy, mining, arms, and agriculture), which help it undercut Western sanctions. Many African ruling elites also buy into the Kremlin's vision of a post-Western world where concepts like democracy and rule of law are subordinated to the imperatives of kleptocracy and where state sovereignty surpasses international liberal norms.

With its more than 50 votes in the UN General Assembly, Africa is an important arena for Russia's campaign to create a more multipolar world order, undercutting legacy international institutions and building up new non-Western and nonliberal forms of global cooperation. Finally, the Kremlin looks to Africa to expand its military and political footprint, seeking to establish a military presence and security partnerships in countries along the Red Sea, Indian Ocean, Mediterranean Sea, and even the Atlantic.[60] Russia employs a range of tools to advance its strategic objectives. These include both hard and soft power, reinforced by the legacy of Soviet support for decolonization movements, including a long history of training African elites in Soviet/Russian institutions.

Today, the most visible element of Russia's involvement in Africa is its deployment of military and security forces. These include the infamous Wagner Group private military company, now reorganized under the control of the Ministry of Defense's intelligence branch and known as the Africa Corps, to provide security for authoritarian rulers, suppress insurgencies, manipulate elections, and otherwise support friendly regimes. As part of this process, Moscow has involved itself in the internal politics of several African states through information operations and electoral manipulation. These tactics, often pursued with and through local proxies, are frequently opaque and corrupt, making them difficult to detect, harder to dispel, and even more challenging to inoculate against.[61] At the same time, the diplomatic benefits Russia has achieved in Africa remain modest. The November 2024 Russia-Africa Summit, which aimed in part to dispel the perception of Russian isolation, only brought 17 African heads of state to St. Petersburg, compared with the 43 who attended the previous summit in 2020. Nor have many African states sided with Russia on UN General Assembly votes related to the war in Ukraine.

Russia maintains an active interest in the Middle East as well, leveraging historic relationships and its involvement in the Syrian civil war to broker power across the region. While the fall of Bashar al-Asad's government to Turkish-backed rebels in late 2024 calls into question Moscow's ability to maintain its military toehold in Syria, it has not altered the Kremlin's desire to use the wider region as a platform to project power against the United States and its allies. As in Africa, Russia benefits from maintaining and cultivating relationships with elites that date to the Soviet era. From its 2015 intervention in the Syrian civil war through the late 2024 collapse of the Asad regime, Russia maintained a distinctively more "military" approach in the Middle East than China. It had sustained multiple bases in Syria compared to China's singular base in Djibouti. Russia has also pushed—thus far unsuccess-

fully—for permanent military bases in Libya and Sudan, both of which could become new focal points for Russian power projection following the loss of its bases in Syria.

Meanwhile, Russia's paramilitary activities and arms sales in the region cement it as a notable security presence. Nevertheless, Russia's ongoing war in Ukraine limits its direct involvement in the Middle East, especially as sanctions choke its global arms sales. Instead, Moscow has leaned further into its entente with Iran, backing Tehran's regional ambitions and helping upgrade its military capabilities in exchange for Iranian support in Ukraine.

Great Power Relative Influence: Tools and Capabilities

This section describes the capabilities and resources that the three Great Powers bring to the competition in Africa and the Middle East. It assesses the key tools and mechanisms available to Washington, Beijing, and Moscow in the categories of economic stature, politico-diplomatic competition, ideological resonance and communications infrastructure, and military capabilities. The section evaluates how the tools available to each rival will influence the trajectory of Great Power competition there for the remainder of this decade.

Economic Competition

China. China leverages a wide range of economic tools in its relations with the Middle East and Africa.[62] It is a major trade partner and source of overseas investment, development assistance, and concessional loans. It coordinates economic initiatives throughout these regions through cooperation forums (FOCAC, CASCF, and SCO). China has already signed a free trade agreement (FTA) with Mauritius. It is pursuing FTAs with the Gulf Cooperation Council, Israel, and Palestine. It also has expressed interest in exploring an FTA with the Africa Continental Free Trade Area, encompassing the entire continent. China has established special economic zones in numerous countries across Africa and the Middle East as well as agricultural demonstration centers across sub-Saharan Africa.

To facilitate economic relations, China often offers concessional loans to fund projects in these regions from its development banks as well as the Chinese-led Asian Infrastructure Investment Bank that was created in 2015. Overarching many of these economic engagements is China's BRI. Beijing has been remarkably sophisticated in the ways it stresses the complementary nature of its own economic goals and the economic plans of individual countries throughout these regions.

China has been diversifying its economic approach to the Middle East and Africa. Long focused on both regions as a reliable source of fossil fuels and vital minerals, China has begun reorienting its economic interactions for the long term. In the Middle East, it has committed to developing clean energy alternatives. It also has intensified collaboration on technological advancements for the futures in a wide range of sectors, including artificial intelligence and nanotechnology. Finally, Beijing has emphasized growth through financial markets, two-way foreign direct investment, and tourism by easing joint market access and cultural travel opportunities.[63]

Similarly, China has begun investing in a future in Africa that aligns with its own evolving economic realities.[64] Since experiencing a slowdown in economic growth rates and implementing its own capital controls in 2016, China has started adapting relationships in Africa away from resource extraction and mega infrastructure projects toward smaller,

industrialization-oriented investments and green projects. China is also prioritizing fiscal stabilization in its financial relations, limiting new projects while renegotiating high African nation debts with a combination of restructuring options favoring extension over relief. Simultaneously, China is pushing for growing use of the yuan in commercial and financial transactions. Finally, it is further enhancing soft power through people-to-people programs featuring higher education, media, and culture exchanges. Already the second most frequent destination for Africans seeking higher education with double the number of those in U.S. colleges at mid-decade, China aims to grow that advantage further by 2030. China also aims to grow tourism in the area with expanded visa-free or visa-on-entry programs like those already present in Egypt, Mauritius, Morocco, and Tunisia.[65]

The United States. The U.S. African Growth and Opportunity Act (AGOA) has been a consistent feature of American bilateral and multilateral efforts to cultivate deeper economic relations with sub-Saharan Africa since 2000. The program offers more than 30 African participant countries preferential access to U.S. markets by eliminating import tariffs. Policymakers hoped that AGOA, as the primary U.S. trade policy for the region, would foster economic and political development in Africa, the world's fastest-growing continent in both economy and population. The outsize roles of oil and apparel in African export growth have raised questions about whether AGOA can diversify the region's economies and increase its competitiveness in global markets. After peaking in 2008, U.S. trade with AGOA participants largely stagnated. Meanwhile, African trade relationships with other countries, particularly China, have greatly expanded. AGOA will expire in 2025 unless formally extended.

From 2021 through 2024, U.S. economic aims for Africa began to emphasize infrastructure development initiatives providing alternatives to China's prodigious BRI projects that came to dominate the continent from 2007 to 2020. American programs include Power Africa, Prosper Africa, the 2023 G-7 Program known as the Global Infrastructure and Development (PGII), and an initiative on digital transformation. In May 2023, President Biden chose Africa for the first and flagship economic corridor under his signature $600 billion PGII initiative to address the global infrastructure gap. Since December 2022, PGII announced U.S. investments totaling more than $1.5 billion in the Lobito Corridor for transportation, digital access, agricultural, and clean energy infrastructure projects. Washington began to focus the enhanced but still limited funding for these programs on sectors that melded U.S. priorities and African partner needs critical to sustained economic growth, including agribusiness, energy, entertainment, health care, and technology. All are designed to capitalize on the fact that due to a combination of debt distress and Beijing's post-COVID-19 pullback on its massive global infrastructure financing and investments, there are concerns among some countries regarding the long-term consequences of Chinese lending and investment.

Pursued alone, American economic initiatives will be insufficient to overcome expansive Chinese economic leverage. American bilateral and multilateral economic initiatives will need to be pursued in tandem with other Western-sponsored investment and trade activities from the likes of Europe, India, and Japan. (Indian and Japanese possibilities are addressed later in this chapter.) The November 2021 EU Global Gateway Africa initiative is another prospective partner—a decade-long, 150 billion euro financed Europe investment

package that aims to support African programs and activities pursuing a strong, inclusive, green, and digital economic expansion and transformation. While the Biden administration prioritized collective economic and diplomatic initiatives led by the United States for Africa, it is unclear that a second Trump administration will continue this multilateral approach.

In the Middle East, American economic aspirations at mid-decade seek alternatives to Chinese trade and commerce dominance and to protect the unchallenged status of the U.S. dollar in regional and global energy markets. Its tools to address trade and commercial strategic objectives rely on building economic connections between regional partners. For example, in late 2023, the United States announced support for an India–Middle East Economic Corridor (IMEC). An ambitious, long-term project, IMEC aims to generate a new Arabian Gulf railway, road, and pipeline system linking ports from Southern Europe through the Middle East and onto India, thereby exploiting souring Sino-European economic relations by challenging long-standing Chinese efforts to dominate the port, canal, and waterway system linking Europe and Asia through the Middle East.

Washington also must remain on alert to blunt Chinese efforts to induce Saudi Arabia to reduce its massive reliance on the petrodollar for trade in global energy markets and move toward transactions featuring the yuan. China clearly aims to move Riyadh toward a break with the petrodollar. Thus, Washington must ensure Saudi Arabia continues to view American partnership and the yuan's relatively limited asset conversion options outside of China to make the replacement of the petrodollar too risky for the near term.

Russia. Russia offers African and Middle Eastern states relatively little on the economic front. Compared to China or the United States, it has little investment capital or loan funds available. It focuses on strategic natural resource sectors that lock in long-term relationships and create revenue streams that local officials can distribute to consolidate their power. Historically, energy deals have been among the principal sources of Russian influence in both the Middle East and Africa. Natural resource companies like diamond miner Alrosa and oil major Lukoil are the leading Russian investors in Africa. Lukoil, state oil company Rosneft, and natural gas monopoly Gazprom are all players in the Middle East as well. Rosneft maintains a strategic partnership with the National Iranian Oil Company to develop new Iranian oil and gas fields. It also has interests in Iraq and across North Africa. The November 2024 Russia-Africa Summit at Sochi saw Moscow promise African states mutually beneficial collaboration in the energy and mining sectors and "total support" in the struggle against terrorism and extremism in return for their support of Russia's anti-Western narratives on the continent.

The scale and scope of Russia's trade relationships with these states is also modest. Russia's main exports—energy (oil, gas, and nuclear) and weapons—allow it to maintain some presence. Russia's niche in the arms market is providing relatively low-cost weapons with few strings to a wide range of governments and nonstate actors. In 2023, state arms exporter Rosoboronexport delivered more than $5 billion in weapons to African states, though the war in Ukraine has limited the availability of arms for export. Arms sales are also a major component of Russia's relationship with Iran, which is seeking to purchase high-end capabilities like S-400 air defense systems and Su-35 fighter jets in exchange for its support of Russia's war effort in Ukraine.

Apart from the sale of these items, Russia's economic significance for Africa and the Middle East is threefold. First, Moscow allows poor but resource-rich African states to pay for the provision of Russian security forces through mining, timber, and other concessions that make these operations lucrative financially as well as strategically for the Kremlin. Second, Russia collaborates with other major oil-producing states (especially in the Arab Middle East) through the OPEC+ forum to manipulate global energy prices. And third, since the start of the full-scale war in Ukraine, several Middle Eastern states have become priority destinations for Russians seeking to avoid military service or evade sanctions. States like Turkey and the UAE have maintained robust economic relationships with Russia despite sanctions and become important destinations for Russian citizens and their money. Bilateral trade between Russia and several Middle Eastern and African states has grown as well, with many goods subject to sanctions or export controls finding their way to Russia through companies in Turkey, the UAE, and elsewhere.

Political-Diplomatic Competition

China. China's political approach to the Middle East and Africa emphasizes sovereignty and nonintervention. Beijing does not want to pick sides in regional disputes and strives to maintain positive political relations with every country in the Middle East and Africa except Eswatini, which recognizes Taiwan. The PRC avoids alliances due to concerns about being drawn into conflict.

Beijing pursues diplomatic relations with these regions through bilateral and multilateral mechanisms. It has established strategic partners with every major country in the Middle East, except for Israel, and maintains strategic partnerships with all major countries in Africa.[66] China also pursues these partnerships with smaller countries in these regions. For example, it recently established ones with Guinea-Bissau, Kuwait, and Palestine. Its strategic partnerships with regional institutions include the African Union, Arab League, and Gulf Cooperation Council.

Beijing works to contribute to resolving hot spot issues in the regions through its special envoys for the Middle East (focused on the Palestinian-Israeli conflict), Africa, Syria, and the Horn of Africa.[67] It also engages in robust multilateral political interactions through its cooperation forums (FOCAC, CASCF, and SCO).[68] The norms underlying its political interactions with these regions are the Five Principles of Peaceful Coexistence, South-South solidarity, and support for the cause of the Palestinians. Increasingly, China is encouraging an expanded BRICS to include more states from the Middle East, including Egypt, Ethiopia, Iran, Saudi Arabia, and the UAE.[69] Turkey also recently expressed interest in joining BRICS +.[70] As discussed earlier in the chapter, China's BRI, GDI, GSI, and GCI also all have diplomatic manifestations reinforcing President Xi's global vision of a Common Destiny for Mankind.

The United States. During the Biden Presidency, the United States emphasized development and diplomacy initiatives over military responses while stepping up cooperation with like-minded allies and partners in the Middle East and Africa to reduce the growing influence of China and Russia.[71] But challenges to this strategy were daunting, and they seem likely to become more fraught under the second Trump administration.

First, the appeal of democracy across Africa remains noteworthy, but under duress from growing global authoritarian support for African autocratic regimes. The share of autocratic countries in Africa rose from less than 5 percent in 2008 to over 30 percent in 2020, while the share of democratizing countries fell from 20 percent in 2014 to only 7 percent by 2020. Since 2020, there has been a marked decline of electoral democracies and a reemergence of "closed autocracies," with the latter now ruling one-fifth of African states. By 2023, half the continent's population lived under autocratic rule, while only 7 percent lived in "free" countries.[72]

In December 2022, President Biden convened the U.S.-Africa Leaders' Summit in Washington, DC. There, Biden announced more humanitarian aid for the region and several new initiatives, including a "21st Partnership for African Security" and "African Democratic and Political Transitions" initiative. Both expanded the U.S. commitment to engage with and support complex political transitions in Africa and work to assist governments and civil society at critical moments in the democratic transition with $100 million to target and increase support to African partners committed to investing in defense governance, readiness, and sustainment. This included an intensified number of senior American leader visits across Africa during 2023–2024, highlighted by then Vice President Kamala Harris' three-country visit in March 2023 and First Lady Jill Biden's two-country visit in February 2023.[73] The Biden administration also named Ambassador Johnnie Carson as a new special Presidential representative for U.S.-Africa Leaders' Summit implementation.

The 2022 summit's agenda framed Biden's diplomatic and economic approach toward Africa into the mid-2020s. Nevertheless, there was no major increase in overall U.S. foreign aid to Africa during the Biden years.[74] It is uncertain that a second Trump administration will expend as much diplomatic and economic energy toward bilateral or multilateral relations across the African continent.

American diplomacy in the Middle East during the early 2020s aimed to reduce tensions, deescalate conflicts, and end wars wherever possible through diplomacy rather than direct military engagement. It also emphasized efforts to build greater multinational political, economic, and security connections between U.S. partners wherever possible.[75] Among the approaches to this aim, the I2U2 grouping of India, Israel, the UAE, and the United States was announced in late 2022 as a "partnership for the future." I2U2 possibilities include American hopes that a Saudi-Israeli-U.S. triangle becomes the new framework for regional stability and sound security against Iran. But the October 2023 explosion of Israeli-Palestinian tensions into a Hamas-Israeli war froze regional normalization talks and ratcheted up direct hostilities between Iran and its regional proxies and demanding additional U.S. military assets into the region. The relevance of the Biden administration's diplomatic-led aims for the Middle East are certainly set to be reevaluated considering the eventual outcome of the 2023–2024 regional war and the policy preferences of a second Trump administration beginning in 2025.

Russia. Russia, conversely, has made support for autocratic rulers a calling card in Africa and the Middle East. In contrast to the United States, Russia opposed the upheavals of the 2011 Arab Spring from the beginning, arguing that secular authoritarian rulers were more effective at maintaining stability and fighting terrorism. Ever since, Russia has positioned itself to the region's authoritarian rulers as an ally and an alternative to maintain-

ing dependence on the West. This appeal has resonated even with the leaders of relatively pro-Western states, such as Egypt and Saudi Arabia, as well as North Atlantic Treaty Organization (NATO) member Turkey. Russia intervened militarily in Syria and Libya in support of secular authoritarians menaced both by Islamists and by prodemocracy movements. More recent, Moscow has deployed security forces and troops from the Wagner Group/Africa Corps to advise and secure authoritarian rulers in several African states, notably the Central African Republic (CAR), Mali, Sudan, and Equatorial Guinea.[76]

As part of its growing alignment with the Global South, Moscow emphasizes anti-Western and anticolonial narratives, calling for a more just and representative international order that accords greater representation to African states. Moscow hosted Russia-Africa summits in 2019 and 2023 (though, as noted, several African leaders boycotted the latter summit over the war in Ukraine and perceptions of Russian indifference to the continent's more pressing concerns). The Kremlin announced during the summit that it had written off around $23 billion in debt owed by African states.[77] During a follow-up Russia-Africa ministerial in November 2024, Moscow promised "total support to our African friends" and promoted its history of support for anticolonial movements to argue it was a more suitable partner than Western states.[78]

In the Middle East, Russia long positioned itself in contrast to the United States as an external balancer and honest broker that can maintain relations with all sides of the region's conflicts. This posture created tensions but allowed Moscow to secure itself a seat at the table in the effort to manage conflicts between Israel and the Palestinians, Israel and Iran, Iran and its Arab neighbors, and others. This balancing act became harder to maintain with Russia's full-scale invasion of Ukraine in February 2022. Facing equipment shortages and Western sanctions, Moscow turned more to Iran, which has become a principal supplier of armed drones and other weapons for Russia's war efforts. In return, Moscow has promised Tehran assistance with its own military, including helping Tehran to develop electronic warfare capabilities and advance its missile and space programs.[79]

Moscow has also supported Iran's use of proxy forces (Hezbollah, the Houthis, Shi'ite militias in Iraq) to contest Western influence in the Middle East. It similarly tilted strongly toward Iranian-supported Hamas in its war with Israel—despite long-standing efforts by Jerusalem to maintain cooperative relations with Moscow before the outbreak of the Israel-Hamas war in October 2023. This pro-Iranian tilt led to the end of the deconfliction mechanism between Israeli and Russian forces in Syria, under which Israel provided advance warning of attacks on Iranian forces and proxies and Russia turned a blind eye if its own forces were not targeted. It is also part of a potential broader strategic alignment among autocratic revisionist powers, notably China, Iran, North Korea, and Russia.[80]

Ideological Competition and the Competition over Information Infrastructure

As in the Global South regions of South and Southeast Asia (chapter 13) and Latin America and the Caribbean (chapter 15), the United States—with the notable exception of Voice of America accessibility—lags China and Russia in terms of access, much less control, of messaging and communications platforms in Africa and the Middle East.[81] China owns outright or shares primary control of a wide array of print, audio, visual, and digital media outlets across Africa—and assures its political and ideological positions are well-represented in

content.[82] China also holds a dominant position across both Africa and the Middle East in fielding the hardware, software, and standards for digital transmission of audio, video, and other forms of Internet, cyber and social media.[83] Chinese 5G infrastructure, data collection, and data dissemination systems proliferate across both regions.[84]

Russia successfully promulgates its anti-Western, pro-Russian disinformation network across inauthentic social media accounts linked to and fueling private messaging groups. Russian private military contractors in Africa also recruit local media influencers and have attacked journalists investigating the abuses of Russian PMCs and civilians.[85] Russian state-owned media outlets RT Arabic and Sputnik Arabic emerged as major sources of legitimate regional news in the Middle East over the course of a decade. The Arabic news aggregator Nabd frequently reposts RT Arabic articles. Other regional media aggregators do as well, assuring a wide and unfettered reach for Moscow messaging.[86] America's Great Power rivals directly control or heavily manipulate the focus of major information infrastructure platforms and domains across Africa and the Middle East.

The number of motivated mass information campaigns across Africa and the Middle East quadrupled from 2022 to 2023, with foreign state sponsors led by Russia and China responsible for most. Russia alone sponsored disinformation and other tools of message distortion to undermine democracy in 28 African states, often with the Wagner Group directly involved. For example, Russian networks "helped prime and promote" the coups in Burkina Faso, Mali, and Niger, whose new military juntas have in turn also become major sponsors of disinformation in West Africa.[87] Russian disinformation is often context-specific and malleable, but consistent in efforts to denigrate Western influence. China's Africa-focused media propaganda continued to concentrate on improving African perceptions of China while denigrating that of the United States. Media outlets controlled by the Communist Party of China offer African outlets cheap or free international content meant to amplify Chinese messaging disguised beneath a veneer of grassroots origin.[88] Russia and China jointly target the countries of the Middle East with interwoven messaging blaming the United States and its Western partners for insecurity in the region, turbulence in the global energy markets, disruptions to Middle East grain and commerce trade, and a host of other problems.

Even though most Middle Eastern and African elites were educated in and prefer to send their children to American and European universities and are English speakers with no knowledge of Russian or Chinese, the United States has struggled to counter the corrosive effect of these narratives on its standing and reputation across Africa and the Middle East. At mid-decade, Washington's ideological primacy is under duress and requires new energy and involvement to adapt and overcome.

China. China's propaganda in Africa amplifies anti-U.S. and antidemocratic narratives. This is especially true with the Chinese narrative that the U.S./Western construct of human rights and universal liberal political international order is disrespectful of local cultures and indigenous tribal histories and thus a form of sociocultural hegemony that Africans must reject. Despite spending untold millions of dollars each year on its Africa-focused propaganda work, by some measures China's favorability gains at the expense of the United States have been modest. Moreover, Beijing's official media outlets have low levels of African viewership, and there is little overlap between the most common themes in their coverage and

those in mainstream African media outlets. Chinese investments in African media space are shaping access to information and key narratives. The effectiveness of Chinese messages continues to be mixed, however. Despite heavy exposure to Chinese media, many African audiences remain focused on advancing their democratic struggles. Those most receptive to China's messaging and governance model tend to be officials within African regimes.[89]

Middle Eastern and African countries have become pivotal in Beijing's narrative push to galvanize the Global South as a counterweight to the U.S. alliance network and advance its vision of a multipolar world order in which China is not beholden to the Western-dominated institutions that form the foundation of the post–World War II system. China advances a narrative that it is a different type of power from Western liberal countries and that it jointly opposes hegemony and bullying practices to safeguard the interests of Middle Eastern and African countries. That narrative is reflected in China's GDI, GSI, GCI, and Community of Common Destiny.

These Chinese initiatives anchor Beijing's efforts to promote a non-Western, illiberal approach to global political governance with a primary constituency of the Global South. Beijing sees the Middle East and Africa, with their long and complicated histories of engagement with the United States and Europe, as regions ripe for this kind of state-centered, sovereignty-protecting approach, explaining why Chinese leaders have adopted the message across both regions.[90] The February 2023 GSI Concept Paper makes China's preferences explicit and highlights the contrasts in how Beijing sees Western dominance of global governance: "The Cold War mentality, unilateralism, bloc confrontation, and hegemonism contradict the spirit of the UN Charter and must be resisted and rejected."[91]

China's approach to media dominance in Africa and the Middle East is most conspicuous across Africa. For more than a decade, China has pursued a three-pronged, authoritarian-friendly approach to exporting its media practices to African television, radio, and print media including websites.[92] First, it has trained African journalists and editors in Chinese programs that coach the avoidance of criticizing African presidents and ministries as well as Chinese officials. Second, Beijing has purchased ownership in a number African media houses and converted their editorial practices toward the Chinese model of state control. Third, China exports—and often subsidizes—Chinese technology to Africa that allows governments to more closely control digital information, including by blocking sites and shutting down Internet access.[93]

Across Africa and the Middle East, Chinese firms Huaweii, ZTE, Cloudwalk, and China Telecom have been the dominant players in building and upgrading the digital infrastructure. Its projects have been pathbreaking for the development of data centers, telecommunications networks, as well as "safe city" projects in urban centers and in national education programs.[94] China has positioned itself as the backbone of information technology infrastructure across the Middle East and especially Africa. Western information technology providers like Google, Amazon, Microsoft, and Facebook have a presence in both regions but are relatively small in scope and scale compared to Chinese actors.[95] In general, Western companies lack the appetite to invest at scale in the African information technology environment because the political and economic risks are high, and, unlike Chinese support for its firms, Western governments rarely subsidize or underwrite these companies. The offshoot is that African countries perceive little choice but to work with

China to build information infrastructure. Despite their concerns that Chinese data centers and safe cities information may be used by China to spy on national governments and covertly gather intelligence, African and Middle Eastern countries continue to view a Chinese Internet as better than no Internet at all.[96]

The United States. A 2023 Gallup polling demonstrated median African approval ratings of Washington policies and overall perceptions of the United States fell from 59 percent in 2022 to 56 percent in 2023. China's approval in the region rose 6 percentage points, from 52 percent in 2022 to 58 percent in 2023, 2 points ahead of the United States. This was the first time in more than a decade that the United States lost its Gallup polling place as the most influential global power in Africa.[97] At the same time, surveys across the continent consistently find nearly 70 percent of Africans prefer democracy to any other type of government. Roughly 80 percent of Africans also reject one-party rule, making China's dominant single-party system run counter to African citizen interests.[98] Thus, there may still be ground for the United States to rebut Chinese ideological narratives.

In the Middle East, Arab youth surveys from before the Hamas-Israeli war found the United States was valued as the most influential Great Power in the region but with China and Turkey more popular.[99] Other late 2023 polling demonstrated a major drop in America's trust and influence among Arabs in the region to its lowest point historically, while support for China, Russia, and Iran all increased. Arabs who believed America played a positive role in the Hamas-Israeli war was only 7 percent and as low as 2 percent in Jordan. By contrast, the percentage of Arabs who hold that China has a positive role in the conflict was 46 percent in Egypt, 34 percent in Iraq, and 27 percent in Jordan. Positive views of Russia were higher, averaging 47 percent.[100]

However, the U.S. Government has yet to effectively contest the growing appeal of some major threads of Chinese or Russian anti-Western propaganda across the regions. The primary reason for this appears Washington's long-standing bipartisan neglect of Africa and its overall preference for a laissez-faire approach to promulgating American ideological and humanitarian virtues in all regions of the world. The Biden administration did begin pushing back against Russian influence in early 2023 with one of its prized tactics: sharing sensitive intelligence with allies in Africa to dissuade countries from believing Russian messaging or partnering with Russian PMCs and paramilitary outfits.[101] It also moved to blunt Chinese and Russian denigration of liberal democracy and individual values with an effort to strengthen open societies in Africa especially. Washington's 2022 Sub-Saharan Africa Strategy promised modernized public diplomacy tools, empowered Ambassadors, a more focus on youth and women in more accessible and creative ways, and reliance on the vibrant African diaspora in the United States to reverse negative trends.[102]

American responses to its information dilemmas emerged in the early 2020s but face strong headwinds. Many American initiatives rely on commercial actor investments. In 2022, Google launched its $1 billion Equiano cable for Africa, running almost 10,000 miles between Portugal and Cape Town. Microsoft launched an initiative to provide Internet access to 100 million Africans by 2025. Amazon's Kuiper satellite network and low-cost receivers aim to open another connection option. In Angola, U.S.-owned Africell began building a digital economy with its 5G network, posing a direct challenge to China's Huawei.[103]

In December 2022, the Biden administration announced the launch of a new Digital Transformation With Africa (DTA) initiative. Enabled by more than $800 million dollars in direct and indirect American financing, DTA aimed to expand digital access, digital literacy, and digital enabling environments across the continent and to support the African Union's Digital Transformation Strategy.[104] The program displayed some promise during 2023–2024 but has far to go if it is to make a dent in China's information infrastructure dominance across Africa. The region still needs many more U.S. (or Western) communications technology companies in the African market, promoting engagement across the digital value chain, reducing the digital divide, and engaging in cybersecurity regulation if it is to have a countervailing impact in the foreseeable future.[105]

Washington may also consider enhanced use of the Voice of America to encourage African outlets to find alternatives to Chinese propaganda. U.S. news agencies such as the Associated Press and Bloomberg could cut the costs of their feeds for African media outlets if they were provided U.S. Government subsidies. Washington could sponsor short-term courses and degree-granting journalism training programs to help African media professionals develop the techniques and professional connections they need to resist China's inducements and intimidation.[106] The prospects for such new initiatives or a continuation of the ones launched in the early 2020s are uncertain at best, and there even is evidence that a second Trump administration will not continue the funding or organizational structure behind the standing activities, much less any new initiatives.[107]

Russia. Russian information operations in Africa and the Middle East prioritize anti-Western themes, with an emphasis on opposition to colonialism and colonial legacies, support for a more multipolar world that no longer defaults to Western ideological prescriptions, and "traditional" values. The emphasis on these themes varies from case to case but serves to reinforce Russia's strategic objective of challenging Western influence in the international system. A consistent element in Russian propaganda is the juxtaposition between what Moscow calls the "world majority" (*mirovoe bol'shinstvo*) and a privileged "golden billion" (*zolotoy millyard*) residing in the West. This rhetorical contrast allows Moscow to position itself on the side of the world majority, despite its own history as a colonial empire in Europe, Eurasia, and beyond.[108] It also contributes to the reluctance of many Middle Eastern and African governments to line up behind Western critiques of the Russian war in Ukraine, as Russian messaging reinforces the perception in much of the Global South that the United States and its allies care more about the suffering of white, Christian Ukrainians than they do about Palestinians in Gaza or African Muslims in Darfur.

Russia and its proxies also exaggerate local themes in much of their information operations, with mixed effects. Wagner has run information campaigns on behalf of rulers in states like the CAR, Mozambique, and Madagascar. Superficial knowledge of local conditions and, often, the absence of Russian personnel fluent in local languages limit the effectiveness of these operations.[109] Russian media outlets have also amplified Palestinian narratives about the war in Gaza. These efforts align both with Russia's broader tilt toward Hamas (and Iran). With public opinion across the Arab Middle East thus far, however, the pro-Palestinian/pro-Hamas leanings of Russian media outlets have had a limited impact on public perceptions of Russia across the region.[110]

Military Competition

The early 2020s witnessed rising violent extremism and Islamist terrorism in Africa. They featured a quadrupling of African terrorist fatalities from fewer than 25,000 to well over 100,000 across the continent. By mid-decade, armed conflict deaths in Africa exceeded levels last seen in the late 1990s and early 2000s during the height of the Second Congo War, which was the deadliest civil war since 1945.[111] In the Middle East, the threats of terrorism from nonstate actors receded in some measure, but the long simmering Israel-Iran security dilemma exploded into war between Israel and Iranian proxies after October 7, 2023, that spread from the Levant and Iraq to the Horn of Africa. The United States, China, and Russia each have been dealing with these disturbing regional security dynamics via a diverse array of organizations, processes, and procedures featuring an ebb and flow of African state responses.

China. China's military footprint in Africa and the Middle East is still quite limited. China possesses no defense treaties with countries in these regions. Its security presence primarily consists of a base in Djibouti, participation in UN peacekeeping operations, multilateral antipiracy missions in the Gulf of Aden, and relatively low volumes of conventional arms sales over time compared to those of other Great Powers.[112] It also engages in military exercises and frequent port calls in these regions.[113]

Before establishing its Djibouti base in 2017, China pursued an explicit policy of no foreign basing globally.[114] The Djibouti base is China's first and to date only declared overseas base.[115] In November 2015, China signed a 10-year contract with the Djibouti government and announced it was establishing an installation in Djibouti to resupply Chinese navy ships participating in Gulf of Aden antipiracy missions.[116] China's base will reportedly host thousands of troops, but as of 2022, only 400 marines were stationed there.[117] The base has an operational pier likely able to accommodate aircraft carriers, other large combat ships, and submarines.[118] It has a heliport but does not yet have a dedicated runway for other aircraft.[119]

The location of the Djibouti base enhances China's ability to protect the SLOCs in the Middle East and Africa and supports the navy's participation in antipiracy activities. According to the Chinese Ministry of Defense, the location also ensures that China can contribute to regional peacekeeping and humanitarian assistance.[120] Based on its experience evacuating over 35,000 citizens from Libya in 2011 and over 600 from Yemen in 2015, China determined it needed a more permanent presence to facilitate future civilian evacuations from conflict zones in the Middle East and Africa.[121]

In some ways, in choosing the Djibouti location, China may have been attempting to demonstrate that it is a responsible power. Several other countries already had bases there, so Beijing at the time could have perceived this as a nonthreatening location for a base, especially given China's experience with conducting multilateral antipiracy activities with those same countries. The United States, France, Italy, and Japan have bases in Djibouti.

Djibouti is China's only base in the Middle East or Africa. However, there has been public source reporting of China attempting to establish a military presence in the UAE, and the Department of Defense has expressed concerns about potential future Chinese military logistics facilities in Angola, Equatorial Guinea, Kenya, Mozambique, Namibia, Nigeria, Seychelles, and Tanzania.[122] Each of these possibilities merits monitoring into the

future, but as of mid-decade, China's basing activity in these regions is limited to the Horn of Africa in Djibouti.

The United States. Based in Stuttgart, Germany, U.S. Africa Command (USAFRICOM) began operations October 1, 2007. As of 2022, USAFRICOM had approximately 2,000 assigned personnel with some 1,400 of these working at the command's headquarters in Stuttgart. Others are assigned to USAFRICOM units working at MacDill Air Force Base, Florida, and Royal Air Force Molesworth, United Kingdom. USAFRICOM never headquartered in Africa proper because some African countries perceived the U.S. command as a neocolonial adventure necessitated by America's supposed hunger for Africa's natural resources. Others were fearful that a U.S. military presence would make them a terrorist target. Nigeria and South Africa were the most vocal in their opposition to any formal headquarters for U.S. military presence in Africa. A 2018 Carnegie Endowment report found that the American military presence in Africa both created backlash against local governments and increased resentment of the United States.[123]

Africa's new military juntas have moved to reduce their dependence on Western democracies and have sought counterinsurgency assistance and patronage from nondemocratic actors like Russia's Wagner Group, recently rebranded as the Africa Corps, which is now directed by a Russian military intelligence unit. The latter has increasingly been relied on to counter insurgency in Mali as French and UN peacekeeping forces have been forced to withdraw from the region.

American policymakers had hoped to avoid the same fate as France, in part by cooperating with the juntas. But by the Spring of 2024 that strategy lost almost all validity, and the United States began stepping back in the face of national protests and official requests calling for the U.S. military to depart. In March 2024, the junta in Niamey, Niger, publicly revoked the military cooperation agreement with the United States and ordered U.S. troops to leave. After negotiations to stay failed, the Biden administration agreed to the request. In May 2024, even before U.S. troops had pulled out, Russian troops moved into U.S. Air Base 101 in Niamey. In April 2024, the United States was also forced to withdraw dozens of special operations troops based in N'Djamena, Chad, because a letter from Chad's chief of air staff implicitly threatened to end its security agreement with the United States. USAFRICOM head General Michael Langley, USMC, warned that the loss of U.S. bases in the region would "degrade our ability to do active watching and warning, including for homeland defense."[124]

These two American military withdrawals mark a worrisome trend in the region away from Western nations and toward Russian PMCs and Chinese military weapons, equipment, and training. The loss of these countries as partners, as well as the U.S. military bases located there, are blows to long-standing American counterterrorism operations around the region. U.S. military leaders also began warning in the 2020s that China was actively pursuing a second, military base in Bata, Equatorial Guinea, and now is pursuing one in Gabon and possibly other countries on the Atlantic coast.[125] These would give the Chinese military direct access to the Atlantic Ocean for the first time and establish only the second formal Chinese overseas naval base after the one it opened in Djibouti in 2017.[126] China publicly dismisses this possibility, but American officials note that there were repeated Chinese denials about Djibouti, right up until the military base was announced.[127] Washington

remains alarmed about this possibility and deliberately lobbied leaders in Gabon and Equatorial Guinea during 2023–2024 to reject Chinese overtures for a formal military presence on their Atlantic coastlines.[128]

For the time being, the Middle East remains largely under the American security umbrella. The United States maintains a network of bases across the Middle East and a greater troop presence than either Russia or China, anchoring its status as a regional security guarantor. U.S. Central Command has a forward headquarters in Doha, Qatar, and so too does the U.S. Ninth Air Force. The U.S. Navy's Fifth Fleet is based in Manama, Bahrain, and the U.S. Third Army forward headquarters is in Kuwait. The United States has at least 19 military sites, 8 of them permanent, in countries including Bahrain, Egypt, Iraq, Israel, Jordan, Kuwait, Qatar, Saudi Arabia, Syria, and the UAE.[129] At steady state, about 30,000 U.S. Servicemembers are posted at its military bases in the region with another 2,000 to 3,000 on shorter term deployments ashore or in the oceans of the region during the early 2020s. The outbreak of war in Gaza in October 2023 spiked additional U.S. positioning inside or supporting operations in the Middle East, adding around 7,900 to the steady state total (see figure 12.3).[130]

Despite recurring efforts to draw down the U.S. military footprint across the Middle East, relentless terrorism, political turbulence, and armed clashes between the hostile states and proxies have retained most of the U.S. military's long-standing regional footprint in place through mid-decade. The U.S. military presence in the Middle East at mid-decade is significant, but far less than the 140,000 once there during the height of the mid-2000s war in Iraq. While the U.S. presence has shrunk notably in the past decade, further reduction in the remaining part of this decade could be perilous. That said, predicting the second Trump administration's approach to U.S. military presence and partnerships in Africa and the Middle East is an uncertain task. President Trump's 2024 campaign statements about American overseas military presence ranged from promises of selective activism to general withdrawal.[131]

Another key element of America's security presence in the Middle East is arms sales. From 2019 to 2023, the largest share of U.S. global arms exports went to states in the Middle East (38 percent). However, this was a notably smaller proportion than from 2014 to 2018 (50 percent). The United States remained the largest weapons exporter into the region and at a much greater scale than China or Russia. Four Middle Eastern states were among the top ten global recipients of U.S. arms sales. Saudi Arabia accounted for 15 percent of U.S. arms exports, Qatar for 8.2 percent, Kuwait for 4.5 percent, and Israel for 3.6 percent. The United States was the top arms exporter to most other Middle Eastern states while none had China or Russia among its top three arms sales partners.[132]

At the same time, China has begun to posture itself as a pragmatic alternative to U.S. and Western suppliers. Many Arab states remain frustrated with U.S. adherence to technological and quantity restrictions like those mandated in the American policy for sustaining Israel's "Qualitative Military Edge." Sensing this frustration, China has begun to market its arms options to have fewer political and operational strings attached and relatively equal quality. This may allow Beijing to capture a growing share of the arms market in the Middle East as U.S. presence and preferences wane through the remainder of the decade.[133]

The Middle East remains a vital but unstable region without a logical successor to American military activity to protect the peace and constrain the worst potential outcomes. With less American security presence, the region easily could become even more chaotic and war prone, with anti-American regimes becoming stronger and more entrenched. A slimmed-down yet lethal and capable American security presence, for all its problems, seems more likely in the foreseeable future than none.[134]

Russia. Russia is one of the only powers besides the United States with something like a global power projection capability. To be sure, this capability is on a much smaller scale than that possessed by the United States—especially because the war in Ukraine increasingly consumed Russian resources and forced Moscow to pull back from some of its more far-flung deployments. Russia's largest out-of-area operation since the end of the Cold War was the 2015 incursion into Syria, where Moscow signed agreements with the government of Asad to maintain a long-term military presence—which the new Syrian government appears eager to end.

Russia also maintains an unofficial military base in Libya, where it has played multiple sides in that country's ongoing civil war. Its private military companies have meanwhile deployed to dozens of countries, especially in Africa, where they provide the Kremlin a low-profile, low-cost tool for projecting military, political, and economic power despite the drain that the war in Ukraine is imposing on Russian resources. Because of such constraints, however, Russia has had to adapt and improvise to keep these forces deployed, for instance relying on reflagged commercial ships for maritime transport to Syria. Its PMCs, moreover, long have operated as a kind of public-private partnership, where securing access to local resources such as timber and mining concessions allows their operations to be self-funded and even profit-making. Since the abortive Wagner Group mutiny in mid-2023, the Kremlin has attempted to bring PMC activities under more direct control.

For almost a decade, Russia maintained a sizeable military and security presence in Syria, where it worked with Iran and Turkey to push out remaining U.S. forces. This presence included the Tartus naval base, which Moscow substantially expanded and developed since the start of its Syrian intervention in 2015, as well as a presence at the Khmeimim Air Base outside Latakia. Under the terms of a 2015 agreement, the Russian navy maintained up to 11 warships at Tartus, while Khmeimim hosted dozens of training, transport, fighter aircraft, as well as air defense assets that U.S. officials worried could contest efforts to establish air superiority over the Eastern Mediterranean.[135] Following the full-scale invasion of Ukraine, Turkey closed the Bosphorus and Dardanelles Straits to belligerent states' warships not normally based in the Black Sea, a decision that prevented Moscow from using its Tartus-based Mediterranean Squadron to reinforce its capabilities in the Black Sea.

Russia redeployed some forces from Syria to Ukraine in 2022. Russian troops in Syria then increased in mid-2024 before the sudden December 2024 collapse of the Asad regime forced a rapid withdrawal of Russian troops, aircraft, and warships.[136] If Moscow's early 2025 negotiations with the new Syrian authorities led by Islamist movement Hay'at Tahrir al-Sham to retain bases in the country fail and Russia permanently abandons Tartus and Khmeimim, it will have significant implications for Russian strategic activities and influence across the Middle East and North Africa. The full impact is hard to predict and will emerge in line with the possibility of new Russian military basing options.[137]

In this context, Russia has sought basing rights in other countries across the region. Russian support for the Libyan warlord Khalifa Haftar included the deployment of air assets and PMC forces to the Al Julfra Airbase in central Libya. Though these forces were decimated at the hands of Libya's Turkish-backed transitional government and drawn down to support operations in Ukraine, Moscow still maintains a presence at Al Julfra. It is also seeking a permanent naval presence at Tobruk that would allow it to contest NATO operations in the Eastern Mediterranean.[138] Russia has used its Libyan presence to interfere in the Sudanese civil war, including providing weapons to the Rapid Support Forces.[139] By late 2024, Moscow also was engaging with the rival Sudanese Armed Forces, seeking, as in Libya, to maintain a link to both sides of the conflict in Sudan. This involvement is connected to Moscow's long-standing effort to secure basing rights in Sudan, from where it could project power into the Red Sea and the Suez Canal.[140] Sudan has also become a proxy arena for the war in Ukraine, with both Russian and Ukrainian special forces active in the country.[141]

Alongside regular forces, Moscow also maintained a substantial contingent of PMC troops in Syria. The Wagner Group provided the largest share of these troops until the failed mutiny directed by leader Yevgeny Prigozhin in spring 2023. Other outfits (for example, Redut) then provided the bulk of the PMC personnel prior to Asad's fall. PMCs also constitute the largest share of Russian boots on the ground in Africa. Wagner/Africa Corps maintains military deployments in the CAR, Libya, Mali, Mozambique, and Sudan while also providing political support in several other African states.[142] The rebranded Africa Corps remains a key enabler for Russian influence activities in Africa. Smaller quasi-PMCs such as Redut and Patriot also remain active in Burkina Faso, Syria, Yemen, and elsewhere.[143] Their role ranges from providing personal protection for leaders to combat operations against rebels, Islamists, and other groups. While Wagner maintained substantial operational autonomy as long as its overall objectives matched up with Russian state interests, its successor Africa Corps (as well as non-Wagner PMCs) are subjected to much greater operational control on the part of the Kremlin and the Ministry of Defense.

A Role for India and Japan?

With limited resources, noteworthy liabilities, and a growing sense of urgency due to the high activity levels of Russia and China across both the Middle East and especially Africa, U.S. policy during the Biden administration emphasized expanded relationships and partnerships to compete favorably. The EU and key European states share similar interests to the United States—especially France and the United Kingdom—and have a constructive role to play in fortifying these regions from Chinese and Russian encroachment. However, they too have liabilities and limitations with resources and reputations across both regions. Under the Biden administration, the United States therefore developed two other natural strategic partners to enhance Western ability to compete in these two increasingly important regions in the Global South: India and Japan.

India

India knows that it will have the world's third largest economy by 2027.[144] New Delhi also recognizes that together India and Africa today account for one-third of the world's pop-

ulation, and this number will grow in the future.[145] Thus, India seeks "to engage America, manage China, cultivate Europe, reassure Russia, bring Japan into play, draw neighbors in, extend the neighborhood, and expand traditional constituencies of support."[146] Despite manifest differences with the United States on some of its strategic vision items, India is fully aboard with the construct Free and Open Indo-Pacific region. Thus, many U.S./Western analysts view India's diplomatic leverage and soft power as a potential bridge between the United States/West with the former nonaligned developing world—a world that no longer views America as the sole superpower.[147]

As mentioned in chapter 13, India views all the states of the Indian Ocean region (IOR)—from South Africa to Australia—as contiguous, requiring cohesive objectives and programs from partner states if there is to be strategic success in favor of a free and open regional order.[148]

India has significant soft power advantages over China and the United States in East Africa and the Western IOR. It has a longer cultural and social history in Eastern Africa than either China or the United States. It has twice China's diaspora in Africa, and second- and third-generation Indian families in East Asia dwarf similar Chinese presence there. New Delhi has higher favorable public opinion in Africa than Washington or Beijing.[149] Accordingly, India today places a high priority to developing closer relations across Africa. This emphasis was catalyzed by India's Prime Minister Narendra Modi when he announced the "Ten Guiding Principles for India-Africa engagement" during an address to the Ugandan parliament in 2018.[150] These principles established a development partnership based on African priorities, including open markets, open trade, and focus on the digital economy.

Since 2018, trade between India and all African countries has grown considerably. In 2022–2023, two-way trade was valued at around $98 billion USD and is expected to cross $100 billion USD by 2025.[151] India is now Africa's third-largest trading partner behind China and the EU—eclipsing the United States. India also is Africa's second-biggest credit-generating partner, with Indian EXIM bank lines of credit and commercial Indian company investments becoming critical in many states on the continent. India has Africa's largest digital project, the Pan-African eNetwork, which connects Africa's 54 countries to India and to one another. China's digital impact remains larger, but India's network is substantive and far beyond U.S. alternatives. New Delhi is taking advantage of its close historical and cultural ties across the continent to increase both its economic impact and geopolitical influence there.[152]

In the wake of COVID-19 global pandemic, India in 2021 began an enhanced diplomatic push in Africa. It rejuvenated Indian programs for Africans featuring human resource development, information technology, education, and health care.[153] Then, in 2023, the African Union became a permanent member of the G-20 at the specific initiative and invitation of Prime Minister Modi.[154]

India's main strategic evolution over the past decade has been in its partnership with the United States. Both Washington and New Delhi have grown closer than ever before, as both work together to counter an increasingly worrisome China. India's buy-in with the United States has been not only about the Asian theater but also the Middle East, with measures with diplomatic and economic multilateral arrangements developing from 2022 to 2024. These include the political initiative I2U2 and as an anchor point on the India–Mid-

dle East–Europe Economic Corridor (IMEC) announced on sidelines of the G-20 summit in September 2023.[155]

India is becoming more of an economic stakeholder in the Middle East and by association its security framework. I2U2 and IMEC (both discussed previously) are the most visible evidence of these not-so-subtle changes in posture, led by an increasingly stable consensus between New Delhi and Washington to push back against an increasingly aggressive China.[156]

India's outlook toward the Middle East is moving beyond the traditional centrality of energy and migration. New Delhi has long had a robust diplomatic and cultural footprint given the millions of expatriates living and working there, especially in the Gulf Cooperation Council countries. India now wants to be a partner in the region's post-oil growth designs. Its diplomats in the region, earlier almost exclusively bogged down with migrant matters, are now tasked to secure foreign direct investments from the large Arab sovereign wealth funds. Prime Minister Modi's majority government, in power since 2015, has been palatable to Arab monarchs who do not have to navigate a labyrinth of India's coalition politics looking for fast decisionmaking, which they are accustomed to.[157]

Japan

The Japanese government places particular importance on relations with Africa. Tokyo views it as vital to work with all 54 African countries, which collectively account for more than a quarter of UN members, to maintain and strengthen a free and open international order based on the rule of law. Japan believes this is critical at a time when China and Russia are seeking to change the status quo through force and coercion. Japan's strategic aim is to gain support from the Global South, including as many African countries as possible, to serve as a diplomatic deterrent to dissuade China from furthering its unlawful maritime expansion into the Indo-Pacific region or an invasion of Taiwan.[158] Tokyo is also showing growing concern about the Russian and particularly the Chinese presence in Africa. It sees their expansive policies as a serious threat to its own economic interests. Japan is increasing its aid volume substantially through official development assistance (ODA).[159]

Japan has unique advantages in Africa. It is neither a former colonial empire there nor a global power with hegemonic views. This provides Japan freedom to explore different areas of cooperation and build an innovative relationship with new generations. The third-largest economy in the world, Japan can leverage its hard power in transport production, electronics equipment manufacturing, and steel for infrastructure development, as well as its soft power in traditional arts, culinary science, sports, creative industries, space, gaming, sciences, and technology. On a continent that has a critical need for creating jobs and transforming its economy, Japan can be a game changer.[160]

Where Japan makes the difference is the role of its private sector in Japan-Africa cooperation. Japanese companies have a presence in all 54 countries, with firms like Ajinomoto, Nippon Steel, Rakuten, Sony, and Toyota Tsusho leading the way. The number of Japanese companies on the African continent increased from 169 in 2013 to 259 in 2019. It is in the field of innovation that these companies bring the most significant advantage compared to China, which is more focused on infrastructure.[161] But Japan faces declining internal

revenues and a reduction in the amount of ODA that it can dedicate to the many countries across Africa.

Japan also provides a pivotal dynamic in the evolving struggle over narratives between Beijing (aided by Moscow) and Washington. America and Europe are vulnerable to Chinese criticisms that the West's approach of imposing human rights from above and harshly criticizing the politics and customs of African countries may have the opposite effect, kindling African memories of Western colonialism. China and Russia seek a future where African countries oppose the West and provide an opportunity to expand their influence. Under these conditions, Japan, the only Asian country in the G-7, has an important role to play in engaging Africa on its own terms while developing partnerships to maintain a world order based on liberalism.[162]

Between 2021 and 2024, Japan became increasingly interested in both a stable energy supply and moving toward a decarbonized era. Thus, Tokyo seeks a stable Middle East to build out a security environment and enhanced bilateral relations. For Japan, its relations with the Middle East are no longer be limited to energy policy but will develop dynamically across a broad range of areas, from industrial cooperation to security. Former Japanese Prime Minister Fumio Kishida's signaled this shift in Japanese Middle East diplomacy during a fall 2023 visit to the region announcing that Japan would aim to bolster its presence as a player there.[163]

Japan has an underappreciated amount of soft power in the Middle East. Even though few there speak Japanese or study in Japan, Tokyo's cultural influence conveys through activities like anime and manga. Although cultural attraction has not generated specific political influence, Tokyo is widely viewed as a partner, as it is the only nation with the strongest and longest-standing relationships in every Middle East capital including Cairo, Jerusalem, Ramallah, Riyadh, and Tehran. While a strong ally of the United States with deep commitment to the values of democracy and open societies, Japan has its own version of capitalism with its more communal form of competition, one that promotes the principles of inclusion and equity with the Global South.[164]

Over the past decade, Japan's relations with Israel have significantly deepened in economic, political, and social realms. Much of the change has been fueled by Japan's search for early-stage innovation, which it finds in abundance in the start-up business culture of Israel. With Washington and Beijing locked in a complex phase of their relationship, Israel has sought to broaden its network of partners in Asia. Japan is at the top of that list. Israel and Japan share a mutual future bound by the values of open, free societies, respecting individual liberty and aspirations. Israel and Japan view advancing technology as strategic, a vital means of achieving that common end. Tokyo also has responded to the new message from its Arab energy partners: The time has come to collaborate with Israel. Given these factors, it makes perfect sense for Japan to invest more in Israeli ventures in the era of the Abraham Accords.[165]

Summary and Forecast

Despite obvious downsides from their growing involvement in Africa and the Middle East, China's and Russia's relative influence and popularity have risen in comparison to the United States across these regions during the early 2020s. This is a significant challenge to

American soft power in Africa and the Middle: regions where the future of international norms, rules, procedures, and institutions will be determined in coming years. In Africa, Russia has advanced in stature and influence because of its willingness to trade in arms and in material support at levels at which the United States has thus far been unwilling to engage and through successful Russian disinformation campaigns. China has expanded its political and security influence through its massive BRI infrastructure investment, other economic initiatives, and its increasingly effective narrative on sovereignty protection and South-South cooperation.[166]

Although the Biden administration strategy for Africa and the Middle East aimed to take a comprehensive approach toward better balancing development assistance, diplomatic engagement, and responsible defense cooperation, this "tripod" remained skewed toward the defense leg. Defense cooperation should remain an important part of U.S. strategy in both regions. America must do more to expand diplomatic and development tools of statecraft to improve partnerships, curb the coup pandemic, nudge military juntas to quickly restore democratic rule, and protect shared regional and U.S. interests. American policies should concentrate on development, investment, trade, education, and support for reform of international financial entities such as the IMF, World Bank, and others. Support for free and fair elections should be sustained and accompany necessary military engagement.[167]

Washington cannot do everything in these key regions. Thus, it must do more with close Western partners there, including coordinating the funding of aid, investments, and security packages that enable local aspirations while countering Russia and China. India and Japan along with other West European strategic partners are available and interested. The United States must help enable and assist better multilateral assistance for democratic governance, human values, economic opportunity, along with political and military alternatives to Russian and Chinese influence in both regions.[168]

Final Conclusions: GPC in this Global South Arena

The rise of Russian and Chinese influence and the decline of democracy from Iran to the Cape of Good Hope over the past decade appear mutually reinforcing.[169] The wars in Ukraine and in the Levant region that began in 2022–2023 ushered in a new era of intensifying competition among the United States, China, and Russia for influence across the Global South. Both Chinese and Russian leaders view the great number of countries and the vast domain across Africa and the Middle East as a centerpiece of strategic plans for pushing back against U.S. and Western hegemony and catapulting their own countries into positions of global leadership.[170]

As China's relations with advanced democracies declined in the early 2020s and its domestic population began a steep descent, Beijing affirmed that it must find new outlets for the products of its vast manufacturing base and new economic partners. It hopes that Africa and the Middle East, along with South Asia, could someday become important new sources of demand for China's exports and drivers of its continuing economic vitality. More important, China clearly sees the developing world as a source of backing in its escalating strategic rivalry with the West. Thus, Beijing has sought support from developing countries to advance its own distinctive interpretation of concepts such as human rights and Internet freedom (something Moscow also supports). Beijing also now appears intent on building a network of

strategic facilities (dual-use logistics hubs and military facilities) that could extend from the Indian Ocean, through the Horn of Africa, to the Atlantic coast of Africa, and perhaps into the Western Hemisphere. In these plans, Africa and the Middle East loom large.[171]

As Russia has lost much of its influence in the West and positioned itself as a global revisionist power, the Global South has emerged as a key arena for Russian foreign, economic, and security policy. The countries of the world majority, including in the Middle East, Africa, and China, are instrumental in Russia's strategy of challenging legacy institutions and supporting a new non-Western, nonliberal framework for global governance. Even if Moscow lacks the financial heft of Washington and Beijing, its targeted investments, deployment of military and PMC forces to support authoritarian regimes, and capability with cyber-influence operations have allowed it to become a major player in much of the region.

Russia has always punched above its weight in the Middle East because of its Cold War legacy of support for Arab regimes and involvement in the region's energy industry. Russian opposition to the U.S.-led Iraq War and the ensuing Arab Spring positioned it as a valuable partner for authoritarian regimes worried about what they saw as U.S.-backed destabilization (to what extent it will remain able to do so following the loss of its toehold in Syria remains an open question). Russia also has a long history in Africa that it has leaned in on an effort to roll back Western influence and recruit African leaders to pursue a more "democratic" world order based on a hard version of sovereignty and rejection of universal standards of democracy and human rights.

To sustain the viability and relevance of the standing liberal international political and economic order, the United States and its strategic partners—especially India, Japan, and those from Europe—need to develop a more coherent, collective approach for dealing with the developing world, including Africa and the Middle East. Part of this must come from refining and revamping international organizations, rules, and norms to better incorporate these states and to represent their views.[172] The Biden administration set priorities that first helped bolster democratic practices and institutions where these already had taken root. This aim may be deemphasized in a second Trump administration.

But American policy priorities might still exhibit continuity in the late 2020s if the Trump administration continues its predecessor's emphasis on countering China's influence in countries that sit adjacent to major maritime chokepoints or contain large reserves of critical resources, especially those in Africa and the Middle East.[173] With its G-7 partners, India, and major European states, the United States will need to consider all options for mobilizing more capital for investments that benefit entire societies rather than select elites, that open educational systems and markets more widely to people and goods from the Global South, and that work collectively to counter more effectively Beijing's accusations against the United States and the West.[174] Africa and the Middle East are key venues for the pursuit of this strategic approach, now and for the remainder of the 2020s.

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Notes

[1] These groupings adopt the *World Population Review* construct with Egypt as part of Africa and the 15 core Middle Eastern states including those of Arabian Peninsula, the Levant, Egypt, Iran, and Iraq, and Turkey. See *World Population Review*, 2024, https://worldpopulationreview.com/country-rankings/countries-in-africa; and https://worldpopulationreview.com/country-rankings/middle-east-countries.

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[8] Originally, this initiative referred to as two separate initiatives: the Silk Road Economic Belt and the 21st-Century Maritime Silk Road. In 2015, the initiative was officially branded as Belt and Road.

[9] For a detailed discussion of these dynamics, see Dawn C. Murphy, *China's Rise in the Global South: The Middle East, Africa, and Beijing's Alternative World Order* (Palo Alto, CA: Stanford University Press, 2022); Dawn C. Murphy, Testimony Before the U.S.-China Economic and Security Review Commission USCC Hearing on "China and the Middle East," April 24, 2024, https://www.uscc.gov/sites/default/files/2024-04/Dawn_Murphy_Testimony.pdf.

[10] In this chapter, *PMC* denotes three distinctive but often overlapping concepts for non-military security organizations: private military contractor, private military company, and private military corporation.

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Chapter 13

Great Power Competition in Latin America and the Caribbean

By Douglas Farah and Marianne Richardson

Latin America and the Caribbean (LAC) is a unique and important region for contemporary Great Power competition. With 33 countries, it is the second-largest region in the Global South behind Africa and a major prize in the contest among Washington, Beijing, and Moscow for the future of international rules, norms, procedures, and organizations. The People's Republic of China has begun to turn two decades of economic and infrastructure development programs into political influence operations and venues for future potential military access. Russia has refurbished and upgraded its Cold War regional disinformation operations and military support activities with modern technologies and processes to noteworthy effect. Washington has only recently recognized that it cannot take LAC for granted. Despite its relative decline in regional influence, the United States has an array of advantages—unilateral and in partnership with Europe and Japan—that can safeguard LAC as a region aligned with post–World War II rules, norms, and procedures. It must commit to a smart, multifaceted regional strategy that uses these advantages for the remainder of this decade to bolster waning support for global order built on the rule of law and democratic norms.

Introduction

Latin America and the Caribbean (LAC) is an increasingly prominent region of strategic competition among the Great Powers. At mid-decade, LAC is now widely understood as an important region of the Global South where intensifying Great Power competition looms large.[1]

LAC is its own unique region of the world with a tumultuous history of postcolonial dominance by the long economic, political, and security shadow cast by the United States.[2] It featured an intense political and security competition between the United States and the Soviet Union during the Cold War, captured at its most acute stage during the Cuban Missile Crisis in 1962. The People's Republic of China (PRC)'s economic presence in LAC has grown dramatically since the dawn of the 21st century, and Beijing has increasingly

converted its enormous trade and infrastructure investments into political influence and strategic access.[3] Over that same period, Vladimir Putin's Russia has rebranded, reframed, and expanded security relationships with Bolivia, Cuba, Nicaragua, and Venezuela while making inroads in Colombia and Peru. Moscow challenges Washington's "regional sphere of influence" in a manner that Putin believes counters the way the United States shamelessly and unjustly challenges Russia's rightful ascent over its "near abroad," or sphere of influence, in member states of the former Soviet Union.[4]

Russia, the PRC, and the United States are joined in important geostrategic competition across LAC. The key areas of Great Power competition there have shifted over the past decade but remain a driving force in regional dynamics. As the 2022 National Security Strategy recognizes, "no region impacts the United States more directly than the Western Hemisphere," where "external malign actors like the PRC and Russia [are] working with autocrats to undermine democracy."[5]

The United States and the PRC are in strategic competition over a broad spectrum of diplomatic, informational, military, economic, and cyber/digital sectors—especially deep space exploration, 5G, digital infrastructure, electrical grids, port infrastructure, strategic waterways, and key extractive minerals such as lithium and copper. Russia is competing against Washington in narrow but strategically significant areas where it holds historical advantage—with anti-American disinformation, support for anti-American authoritarian regimes, and military equipment and training for troublesome regional states. Dominant across LAC for more than a century while guided by the Monroe Doctrine and Roosevelt Corollary, the United States has—since the Barack Obama administration—lost significant influence in the hemisphere.[6] The erosion of the American competitive edge will likely continue to erode over the next decade, with the PRC best positioned to secure gains.

To minimize the strategic risk from this erosion of influence, Washington must improve its game in LAC along two vectors befitting a declining but determined regional power. First, it must smartly contest the true military, paramilitary, domestic security, and cybersecurity threats posed by Beijing and Moscow by focusing on the most geostrategic ones, not all of them. Second, working with allies and partners like Japan and the European states, Washington must offer generous but limited trade, finance, and infrastructure development alternatives to the most vital LAC states—giving them reason to limit further Chinese expansion and expanding their own opportunities to resist Chinese coercive influence established by Beijing's regional economic prowess.

This chapter traces the recent evolution of Great Power competition across LAC, demonstrating the comparatively weakened power of the United States there and recommending how better strategic partnerships among the United States, Canada, Europe, and Japan appear the best means to counter inroads by its strategic rivals there in the coming half decade. The chapter describes the parameters of strategic competition across LAC from 2010 to 2020, establishing the role and activities of China and Russia there during that period. It also forecasts the likely evolution of strategic objectives, capabilities, and limitations for the three Great Powers in LAC from 2025 to 2030. The chapter specifically analyzes the special roles of Venezuela and Iran in Great Power competition across LAC. It concludes with several recommendations for American policymaker consideration for the remainder of the 2020s.

Parameters of Strategic Competition in Latin America, 2010 to 2024

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Over the past 15 years, the United States has quietly but significantly lost strategic influence in Latin America, as Washington has reduced its priorities in the region and its strategic rivals have increased their focus and investments. The PRC and Russia have long shared the strategic goal of displacing U.S. economic, military, and security influence in the Western Hemisphere. This has led both powers to cultivate close relationships with the most authoritarian and antidemocratic governments in the hemisphere, most notably those in Cuba, Nicaragua, and Venezuela.[7] Outside of their shared anti-Washington vision, the PRC and Russia undertook only few joint activities across LAC over the past decade.

In her 2023 posture statement, U.S. Southern Command (USSOUTHCOM) Commander General Laura Richardson, USA, noted that the PRC "continues to amass power and influence" in the hemisphere and stated that "this is a decisive decade and our actions or inactions regarding the PRC will have ramifications for decades to come."[8]

Given the geographic and cultural proximity of Latin America and the United States, the $700 billion in interregional trade, the large diaspora communities of Latin Americans in the United States numbering tens of millions, and the importance of remittances from these communities to their home countries, Washington retains significant influence there. Yet as a recent U.S. think tank study noted, "the relationship between the United States and countries in the region appears to be growing more distant as Washington deals with pressing national and other global priorities and Latin American governments are consumed by domestic challenges and actively pursue multi-alignment."[9]

For more than a decade, the PRC and Russia sought and gained access and influence across LAC despite America's multifaceted advantages. Beijing and Moscow made their biggest and most sustainable gains in influence with the growing number of LAC countries experiencing three forms of decay: erosion of liberal democracy, rising state capture of ideologically agnostic authoritarian governments by transnational organized crime groups, and economic stagnation. Washington's Great Power rivals exploit LAC hardships and vulnerabilities with hard power and sharp power activities across the region and are unconstrained by environmental, human rights, and rule-of-law conditionalities that historically restrict U.S. programs.[10] China and Russia also effectively use state-owned media outlets to wage information campaigns that, while not directly coordinated, provide a consistent and broad anti-U.S. narrative and support for authoritarian regimes.[11]

As multiple analysts note, while the PRC may not seek to produce authoritarian regimes, the ideologically agnostic authoritarians suffocating democracy across LAC—as in the world at large—find a willing, nonjudgmental, and nonideological partner in China, which portrays itself as a business associate, not a totalitarian regime with global aspirations.[12] This gives the PRC in particular a vital competitive advantage, as it takes control of key supply chain nodes and strengthens it hold over strategic mineral supplies. The PRC thus becomes increasingly dominant in these areas, and in trade relations, which are key areas of competition with the United States.[13] In one example of this dynamic, the PRC's

State Grid International Development Company Limited (SGID) purchased 96 percent of a main Chilean electricity provider, Compañia General de Electricidad, for $3 billion in November 2020. In June 2020, SGID purchased a majority stake in Chilquinta Energia SA for $2.3 billion, meaning that in only 6 months a PRC state company acquired approximately 53 percent of Chile's electrical production.[14]

The U.S. National Security Strategy defines American interests in LAC as revitalizing "our partnerships to build and preserve economic resilience, democratic stability, and citizen security within the hemisphere," both now and in years to come. Included in this concept are mitigating and managing the growing migration phenomenon by building regional emergency response capabilities, "reinvigorating regional economic institutions, securing supply chains, creating clean energy jobs . . . ensuring sustainable and inclusive trade, and making game-changing investments that increase the effectiveness of public administration."[15]

Over the past decade, USSOUTHCOM has become the lead voice in the government publicly identifying the PRC as its main strategic concern and urging greater American response to Beijing's growing competitive edge across LAC. Its past three commanders have documented how the PRC has begun exploiting its infrastructure investments and technological dominance to expand Beijing's influence economically, militarily, and politically in a manner that jeopardizes regional stability, access to natural resources, and cybersecurity—all of which are key U.S. strategic interests. Additionally, USSOUTHCOM has documented China's role in perpetrating or enabling environmental crimes, including illegal fishing and logging, further compounding security concerns in the region.[16] USSOUTHCOM has identified improving U.S. regional cooperation in all three categories as the key LAC security challenges for Washington to address.[17]

The Russian Great Power challenge to the United States across LAC is different in nature and focused primarily on information operations. Diverse, interlocking media and cyber ecosystems allow Russia to shape the information environment with anti-U.S. and antidemocratic messaging. These messages target multiple audiences by leveraging Russia's limited but influential alliances with regional and extraregional allies in the hemisphere to weaken U.S. influence, strengthen authoritarianism, and blunt the perception that Russia is internationally isolated. Russia's efforts expanded following its seizure of Crimea in 2014 and have grown dramatically since the February 2022 invasion of Ukraine.[18]

USSOUTHCOM identifies malign Russian activities as those enabling regional crime and insecurity while stoking disinformation to inflame anti-Americanism across the region. General Richardson testified before Congress that Russia "continues its extensive disinformation campaigns and bolsters authoritarian regimes" as well as transnational criminal organizations that "spread violence and corruption throughout the region."[19] These directly challenge regional U.S. security priorities. Cost-effective, highly effectual mis/disinformation campaigns to undermine U.S. interests have become Russia's primary area of competitive advantage in the hemisphere.[20] As in with the PRC in LAC, the United States has struggled to craft a comprehensive and holistic strategy to blunt Russian encroachment across the region over the past decade.

American challenges to countering PRC and Russian influence across LAC include competing global security interests, constrained budgets, and weak diplomatic presence.

While the partial relegation of other foreign policy priorities was inevitable following Russia's February 2022 invasion of Ukraine, Washington's fiscal year (FY) 2023 requested aid package for Latin America of $2.4 billion was a stark contrast to the $75 billion requested for Ukraine. The FY 2024 aid package for Latin America as requested by the Joe Biden administration is approximately $2.5 billion, and the projected FY 2025 aid package appears to top just $1 billion.[21] As Central Intelligence Agency director William Burns noted, "priorities aren't real unless budgets follow them."[22]

In addition to severe budgetary constraints in the region, the ability of the United States to compete with China has been hobbled by the lack of confirmed U.S. Ambassadors for extended periods of time in key countries. Chile, Colombia, and Panama each went multiple years without U.S. Ambassadors over the past decade, during a time when the PRC was expanding its diplomatic and cultural presence through growing embassies, Confucius Institutes, and other strategic outreach efforts.[23]

The PRC Role in Latin America, 2010–2024

For the first decade of the 21st century, the PRC focused primarily on large-scale loans for mega-infrastructure projects across LAC, peaking in 2010 with a total of $35.6 billion in state-to-state loans. This amount tapered down to $6.2 billion in 2017 and zero in 2020 at the height of the COVID-19 pandemic. The PRC added less than $1 billion in 2021 and 2022.[24] Most PRC commodity-based loans were given to build strategic alliances with the governments in the hemisphere most antagonistic to the United States. Of the $137 billion given out by the PRC's main lending banks from 2005 to 2022, about 90 percent went to Venezuela ($62.2 billion), Brazil ($29.7 billion), Ecuador under the rule of the Bolivarian joint criminal enterprise leader Rafael Correa from 2007–2017 ($18.4 billion), and Argentina ($17.1 billion).[25]

Since about 2015 China shifted significantly from loans to foreign direct investment, which grew from $10.2 billion in 2015 to a peak of $16 billion in 2016, leveling off to about $12 billion a year through 2022.[26] China's direct investment activities have grown dramatically under the umbrella of China's Belt and Road Initiative (BRI), which 21 of the region's 33 countries have joined since Beijing welcomed LAC into BRI during 2018.[27]

A significant portion of the PRC's investment has gone to acquiring national infrastructure and territorial concessions that allow it to conduct operations outside normal host-country controls and oversight. The agreement that the PRC signed with Argentina in 2014 to establish the Espacio Lejano Station north of Bajada del Agrio in Neuquén Province lasts for 50 years and grants the PRC almost unrestricted authority over the operations of the space station on 2 square kilometers during that time. Article 3 of that 2014 agreement states that "the Government of Argentina will not interfere with or interrupt the normal activities carried out in accordance with this Cooperation Agreement"[28] (see figure 13.1).

In 2019, a Chinese proxy agent purchased Isla Perico, a small island in the Gulf of Fonseca, shared by El Salvador, Honduras, and Nicaragua, for $900,000. At the same time, the Salvadoran government offered the PRC 14 percent of the country's territory, including about half of its coastline, as a special economic zone (SEZ).[29] As of 2024, there is no sign of development on Isla Perico, and the fate of the SEZ has not been made public, although there is no indication of PRC activity in the zone (figure 13.1).

Beyond these efforts, China also focused on expanding its diplomatic outreach by getting countries to switch diplomatic relations from Taipei to Beijing. Since 2016, China has succeeded in persuading Costa Rica, the Dominican Republic, El Salvador, Honduras, Nicaragua, and Panama to drop diplomatic recognition of Taiwan, leaving only seven nations recognizing the island.[30] In each case the president of the nation switching diplomatic relations was invited to Beijing and treated to a state visit to mark the importance of the event, with the nation's media treated to all-expense paid trips to cover the events and interview high-level PRC officials. On the diplomatic front, China achieved nonvoting observer status at the Community of Latin American and Caribbean States (CELAC), a diplomatic body formed to exclude the United States, European Union, and Canada, and counteract the Organization of American States.[31] China's presence at this diplomatic organization gives it a channel to do business with heads of states and other nonvoting observer organizations, including Russia.[32] Since 2014, China has hosted an annual China-CELAC forum in Beijing, usually attended by multiple heads of state, giving Chinese leaders a forum for developing both multilateral and bilateral relationships.[33]

These multiple high-level meetings are part of a broader, ongoing PRC outreach program to LAC leadership, including the hosting of the region's most authoritarian leaders, providing a way of legitimizing their rule both internally and internationally. These visits are often tied to announcements of Chinese economic aid packages to struggling economies. For example, the visit of Venezuelan strongman Nicolás Maduro to Beijing in September 2023 came as U.S.-led oil sanctions were creating new economic hardships, and there were increasing human rights criticisms from a broad range of international actors. The visit garnered the promise of debt relief worth billions of dollars, new Chinese investments, and a pledge by Chinese leaders that the two nations would "closely coordinate and cooperate in international and regional affairs, firmly support each other, and jointly oppose hegemonism and unilateralism."[34]

Since Nicaraguan dictator Daniel Ortega broke relations with Taiwan and recognized the PRC in December 2021, there has been a flurry of high-level visits between the two countries, including an April 2024 visit to discuss expanding cooperation on a broad range of issues.[35] Ortega, who seldom leaves the country except for medical treatment for his failing health, has designated his most trusted son Laureano as his chief interlocutor with China.

Beginning in 2010, the PRC has invested significant resources in "telling China's story well" by greatly expanding the PRC's state media footprint. The phrase was coined by Xi Jinping in 2013 in a National Propaganda and Ideology Conference to define the role of state media.[36] The phrase encapsulates the notion that Chinese Community Party (CCP) media must work internationally to strengthen and innovate in the field of external propaganda, enhancing the PRC's "international discourse power" as a key element of comprehensive national power.[37] The effort to control the PRC's narrative in Latin America encompasses the establishment of Confucius Institutes, focused on cultural exchange and exposing Latin American society to Chinese history and values. The number of Confucius Institutes in Latin America grew from 6 in 2 countries in 2012 to 39 in 20 countries by 2017 and 39 in 25 countries in 2020.[38] In 2016, the PRC hosted the China–Latin America Media Leaders Summit in Santiago, Chile, paying travel expenses for more than 80 Latin American jour-

nalists so they could attend. President Xi's speech praised the Confucius Institutes' role in "showing the world a more authentic and vibrant China" and promised to free training for 500 Latin American journalists in the PRC over 5 years.[39] This training fits with the PRC's emphasis on cooperative rather than independent or investigative reporting, prioritizing content-sharing agreements, joint interviews, joint media portals, coproduction of programs, and exchange programs.

One of the largest media outlets involved in these efforts is Xinhua Espanol, the Spanish-language, Chinese-owned news service that provides a traditional wire news service, television programming, YouTube, and social media platforms. In 2016, Xinhua had 21 bureaus in 19 countries. They claimed 200 regional media subscribers and 200 nonmedia subscribers, largely different government ministries that receive the media service free of charge.[40] Other parts of the state media machinery broadcasting in Spanish in LAC include China Global Television Network en Español, a part of Central China Television, and China Radio International.[41]

The PRC is now ascendent and has surpassed the United States as South America's largest trading partner. China accounted for less than 2 percent of Latin America's trade in 2001. By 2010, the value of trade reached $180 billion and $450 billion in 2022, more than 26 percent of the region's trade.[42] By 2035, trade is projected to exceed $700 billion. Current U.S. trade within the region is $700 billion, which suggests the U.S. comparative trade advantage is eroding.[43] Moreover, U.S. trade data with LAC is skewed due to the enormous role of Mexico in overall trade and the fact that Mexico trade accounted for 77 percent of U.S. imports from the region and 62 percent of U.S. exports to the region in 2023, revealing that Washington is even less competitive with China in trade and commerce with the other 32 countries of the region when Mexico is factored out.[44]

Over the past decade the PRC has acquired some three-dozen key commercial ports; taken control of access points to key waterways, including major ports at both ends of the Panama Canal; dominated 5G cellular and cyber infrastructure; gained near monopoly access to key strategic minerals such as lithium; and expanded deep space capabilities.[45]

The theaters of competition for the PRC are now shifting to seeking monopoly access to strategic minerals such as lithium, building a network of deep space stations and telescopes for dominance of that domain, gaining control of strategic ports and key marine passageways, and building the cyber architecture of the hemisphere that will give the PRC dominant access to much of the cyber activity of the hemisphere[46] (figure 13.2).

As noted, the conversion of economic influence into political and security leverage is reflected in the PRC's changing dynamic in its foreign direct investment strategies. China's foreign direct investment reached $14.2 billion a year from 2010 to 2019 then fell to $6.4 billion in 2022, a period that included the COVID-19 pandemic that severely limited international exchanges. As one study noted, "this drop reflects a substantial recalibration on the part of China's government and its companies . . . as opposed to disinterest in the LAC region. As it stands, Chinese companies are in many cases pursuing more engagement with LAC, but through smaller deals on average—and in frontier sectors that are directly aligned with Beijing's own economic growth objectives"—what the PRC calls "new infrastructure" projects.[47]

Beijing's new infrastructure—or Global Development Initiative projects—includes less focus on large-scale infrastructure projects and a growing emphasis on innovation, including information technology and infrastructure, 5G communications, data centers, deep space technology, renewable energy resources focused on electric vehicles and batteries, electrical grids (Chinese companies now own 53 percent of Chile's electrical infrastructure[48]), and strategic extractive industries.[49] As of 2019, China's Huawei operates in 20 countries in Latin America and the Caribbean. In Central America, Colombia, Mexico, and Peru, Huawei is among the top three cell phone brands.[50] Huawei's dominance in Latin America's digital infrastructure is a concern, as the company often operates as a CCP instrument.[51]

The ongoing shift from a Belt and Roads Initiative (physical infrastructure) focus to a Global Development Initiative (soft and cyber infrastructure) focus will likely dominate the parameters of PRC engagement in LAC as it is part of the CCP's modernization strategy for 2035. This is part of an effort to align PRC with a more prudent assessment of the environmental and economic sustainability of the projects against the backdrop of China's economic downturn.

Russia's Role in Latin America, 2010–2024

Like China, Russia's closest allies are authoritarian regimes across Latina America that publicly espouse a strong anti-U.S. position and disdain for the concepts of liberal democracy, transparency, and combating corruption. Russia's three primary Latin American allies—Cuba, Nicaragua, and Venezuela—are radical populist authoritarian governments that used nearly identical templates to criminalize political opposition, concentrate power in the executive branch, abolish judicial independence, curtail freedom of expression, and rig elections. Russia's influence helped fracture once broadly shared hemispheric values in often fragile democratic systems. With Russia's assistance these values are being replaced by a toxic mix of antidemocratic values, accepted state corruption, and a populism that draws on totalitarian models.[52]

Unlike China, Russia has actively sought influence in Latin America since the late 1940s. The Soviet Union supported multiple Marxist revolutions across LAC throughout the Cold War.[53] Then, through its communist revolutionary proxies, the Soviet Union confronted and indirectly fought against the United States and its hemispheric allies, including support for the victorious Cuban and Nicaraguan revolutions. Moscow trained thousands of cadres from across the hemisphere, and some of them—especially from Cuba—joined other Russian proxies in Cold War communist combat actions in Angola and elsewhere in Africa.[54] The emergence of an economically devastated, chaotic Russia after the Cold War made ongoing activities in Latin America untenable for a time. But to this day, Russia retains many friends from that Cold War era now in senior positions in governments across multiple LAC countries.

Russia's LAC influence does not come from economic interactions.[55] Moscow's trade and investment profile in Latin America is limited, especially compared to the United States. Total trade between Russia and Latin America in 2021 was valued at $20.6 billion.[56] In contrast, 2021 U.S. exports to Latin America were valued at $398 billion and imports were valued at $589 billion.[57]

With scant resources to invest in the region and little capacity to project meaningful direct force into LAC, Russia cannot directly compete in most strategic areas with either the United States or China. Instead, it has leveraged its biggest strategic advantage: an effective, cost-efficient, innovative, and multilayered campaign of influence operations working across multiple media and cyber platforms.[58] Russia uses a disinformation network to dominate key narratives, consolidate pro-Russia or anti-U.S. sentiment, and exercise significant influence over many left-wing, LAC political elites who are reflexively hostile to the United States.[59]

Apart from sophisticated Russian influence operations targeting powerful elites and LAC public opinion, Russia's strategic competition across LAC features the sale of sophisticated Russian surveillance technology to state and nonstate actors. These sales are narrow in scope but have an outsize impact; Russian equipment is sold with few controls and limitations on how it may be used. Much of the equipment is sold through websites of front groups that are directly tied to the Russian government, often led by former KGB officers or other former Soviet intelligence services that were later reconstituted in the post–Cold War Russian state.[60]

Putin's Russia also has resuscitated the Soviet tradition of strategic competition through the sale of weapons and training of military units. For most of the decade and a half from 2005 to 2022, Russia relied heavily on weapons sales and military training to influence countries across the Global South and in key parts of LAC. Under a rejuvenated Soviet playbook, Russia sold aging weapons to the authoritarian regimes of Maduro in Venezuela and Ortega in Nicaragua for most of the 2010s. Moscow also contracted small units of what was the Wagner Group (a Russian paramilitary outfit founded by the late Yevgeny Prigozhin) operating in Venezuela to train troops and provide personal protection for Ortega and Maduro. Russia's ability to rely on these tools of influence waned after Russia invaded Crimea in 2014 and then attempted to conquer Ukraine in 2022. Its Eurasian conflicts meant increased demand for Russia's weapons, military, and paramilitary presence there. Hence, no major Russian weapons sales have been registered in Latin America since 2019.[61] Wagner Group paramilitary and security support operations also reportedly lapsed in 2021.[62] Should Moscow's Eurasian security demands decline, there is every prospect that Russian weapons sales and training would again become a feature in Russia's LAC strategic competition playbook.

Russia continues to leverage its enduring ties to Marxist and socialist movements in the Western Hemisphere and exploit Iranian networks across LAC that have been developed by longtime Russian friends from Tehran. Iranian networks help Russia amplify its messaging through partnerships and proxies. As a 2023 study of Russian influence operations across LAC found:

> *Diverse, interlocking ecosystems allow Russia to shape the information environment with anti-U.S. and antidemocratic messaging. This messaging targets multiple audiences by leveraging Russia's limited but influential alliances with regional and extraregional allies in the hemisphere to weaken U.S. influence, strengthen authoritarianism, and blunt the perception that Russia is internationally isolated. Russia's*