

Chapter 13

The Global South

Latin America and the Caribbean

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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

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 its hold over strategic mineral supplies. The PRC thus becomes increasingly dominant in these areas, and in trade relations, which are key

“For Russia, building influence in Latin America is a means to the end of disrupting Western alliances and institutions. For China, it is a means of building support for Beijing’s way of doing business.”

—Jessica Brandt, “Countering China and Russia’s Asymmetric Activity in Latin America,” *Brookings*, June 21, 2023

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, *Compañía General de Electricidad*, for \$3 billion in November 2020. In June 2020, SGID purchased a majority stake in *Chilquinta Energía 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 Agrío 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).



Figure 13.1. Chinese Cybersecurity and Defense-Related Infrastructure Projects in Latin America and the Caribbean. *Source:* Original figure by co-authors at IBI Consultants, with inspiration from Ella Meyer, “The Rise of Chinese Influence in Latin America,” Center for Latin American Studies, The Ohio State University, March 28, 2023, <https://clas.osu.edu/news/rise-chinese-influence-latin-america>.

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 journalists 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 Español, 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



Figure 13.2. Chinese State-Owned Enterprise Investments and Ownership in Key Ports and Terminals. Key: Blue: ports or terminals owned by Chinese private companies; red: ports or terminals owned by Chinese state-owned companies. Note: Set up in 2016 as a state-owned enterprise, the Chinese Communist Party's powerful Organization Department appoints senior officials. COSCO Shipping Chairman Xu Lirong is also company Party secretary. This system is known as "one organization, two brands." Source: Original figure by co-authors at IBI Consultants, with inspiration from "VRIC Monitor No. 28: China Expands Strategic Ports in Latin America," Center for a Secure Free Society, October 18, 2022, <https://www.securefreesociety.org/research/monitor28/>; and "China's Transport Infrastructure Investment in LAC: Five Things to Know," The Dialogue, Inter-American Dialogue, November 13, 2018, <https://thediologue.org/blogs/2018/11/chinas-transport-infrastructure-investment-in-lac-five-things-to-know>.

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 hemisphere⁴⁶ (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 infrastructure⁴⁸), 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 Latin 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 efforts expanded following its seizure of Crimea in 2014, and its efforts continue to grow since the February 2022 invasion of Ukraine.*⁶³

As Putin's expansionist ambitions grew over the past 20 years, so did Russian activities across LAC. In 2013, Russia declared that its relations with Latin America were of "strategic importance" under the framework of the Primakov Doctrine of 1996.⁶⁴ This status expanded further when General Valery Gerasimov, now chief of the General Staff and commander of Russian operations in Ukraine, detailed the necessity that "hybrid" or "non-linear warfare" response be applied to the ongoing permanent war with the West. Gerasimov argued for a combination of multiple, largely offensive forms of fighting, including information operations, arguing that "new challenges require rethinking the forms and modes of warfare" that are highly adaptable to the circumstances.⁶⁵ These dynamics—and the legacy of the Soviet Union's KGB "active measures" campaigns against the United States during the Cold War—underpin modern Russian influence operations across LAC where disinformation is viewed as a vital tool to further Moscow's strategic objectives.⁶⁶

Russian activities fusing diplomacy, carefully crafted falsehoods, and media and cyber platforms have been successful in several ways, but none more conspicuous than the LAC response to American and Western states' calls for sanctions against Moscow after its February 2022 invasion of Ukraine. Only one LAC country—tiny Costa Rica—agreed to abide by the U.S. and G7 sanctions regime against Russia.⁶⁷

In many ways, this was a surprising result. Despite virtually no aid programs, a limited history with—and a tiny diaspora community from—Latin America, Russia essentially "played the U.S. to a draw on its home field" in a matter of highest strategic importance for Moscow.⁶⁸ In other ways, Moscow's diplomatic success was predictable. A key to Russia's success was its deliberately developed network of low-cost, high-return amplification partners cultivated in the hemisphere—especially in Cuba, Nicaragua, and Venezuela—and from Iran.⁶⁹ Rather than trying to create an overtly pro-Russian narrative regarding Ukraine, Russia and its media allies and amplifiers pressed for LAC neutrality in the conflict, succeeding as only Costa Rica agreed to impose Western sanctions, and multiple U.S. allies (Brazil, Colombia, Ecuador, and Peru) refused to trade aging Russian helicopters and

ammunition to the United States for use in Ukraine in exchange for updated, functional materiel not to take sides in the war.⁷⁰

This Russian influence operations success confirmed the essential strategic role for Russian media and Russian Television (RT) in its quest for influence and leverage across LAC.⁷¹ Margarita Simonyan, the head of state-owned information holding Russia Today (now RT) compared the official media conglomerate to a defense ministry, noting that “the absence of a foreign (media) channel that is yours is similar to the absence of a defense ministry. When there is no war, such a ministry seems not to be necessary. But, when there is a war, the role of the defense ministry becomes critical. And you cannot create an army a week before the beginning of the war.”⁷²

The Roles of Iran and Venezuela

Russia exploits long-cultivated access to networks forged by Iran, by Venezuela, and in tandem. Margarita Simonyan’s Actualidad RT (formerly Russia Today in Spanish and the largest Russian state medium) and Sputnik Mundo are the key nodes through which Russia deploys its state media in LAC and across the wider Spanish-speaking world. Russia’s Spanish-language television broadcasting started in 2009 but expanded significantly in 2014 when Russia invaded Crimea. Russia again increased its Spanish-language operations exponentially after it invaded Ukraine in early 2022.⁷³

These two Russian state mediums have their messages greatly amplified by Telesur, the LAC regional network established by Venezuela’s Hugo Chávez in 2005.⁷⁴ Telesur hosts content that also appears on—or is directly provided by—Actualidad RT (and some content also on HispanTV, the Spanish language satellite station of the Iranian regime). Telesur is also linked to a network of websites that support coordinated joint Russian-Bolivarian narratives and messages.⁷⁵

Further supplementing this network is a cohort of “super spreader” influencers in Latin America, Russia, and Europe. This network created multiple effective Internet and social media platforms to disseminate misinformation, disinformation, and curated messages that echo or directly replicate each other. The network has millions of followers across multiple social media platforms, aligned with and often coordinated with Actualidad RT, Telesur, and other Russian allies.⁷⁶

Russia’s messaging focuses on criticizing the United States as a hegemonic power controlling a unipolar world. According to Actualidad RT and Sputnik Mundo, the U.S. agenda is that of a warmongering bully threatening international peace, which in turn is tied to “supremacy,” “pressure,” and “violations,” both of human rights and of sovereignty.⁷⁷ Russian public diplomacy and media have recently incorporated the term *colonialism* to describe Western influence and *anticolonialism* to describe why Moscow and non-Western countries should forge an alliance against the United States.⁷⁸

A key ally for Russia in this effort is Iran’s HispanTV, which commands a wide audience in Venezuela and across much of Central America and northern South America.⁷⁹ This produces the overlap of super spreaders both there and with Telesur. This ability to build important messaging alliances is a significant element missing in China’s messaging efforts and a likely reason the Russians have been so much more successful despite investing much less in the effort.⁸⁰

The Impact of Russia's Media Network and Influence Campaigns

Messaging from these expansive LAC Spanish-language media platforms is not typically overtly pro-Russian, except in the case of the invasion of Ukraine. Instead, it is anti-United States and anti-North Atlantic Treaty Organization and advocates for challenges to the current world order. Russia uses these themes to tailor its messaging to natural allies in Latin America's traditional radical populist left who have long regarded the U.S. presence in Latin America as an anti-revolutionary imperialist force.⁸¹

At the same time, influential Russian nationalist ideologues with significant influence with Putin (primarily Alexander Dugin and his acolytes of the neo-Nazi far right, allied with the most conservative elements of the Russian Orthodox Church) appeal effectively to the radical populist right in the region, centered in Argentina, Brazil, and Chile through a message of exclusionary nationalism, religious conservatism, deep social conservatism, antiglobalization, and anti-immigration messaging.⁸²

Russia complements its information and ideological strategic activity with a robust and active diplomatic corps.⁸³ Moscow has trained and invested in a core group of experienced ambassadors and long-term senior diplomats across LAC. These professionals are fluent in Spanish and have spent years rotating through embassies around the region. Together, they provide a stable network with regional expertise, strong personal and professional networks in the region, and political allies across the hemisphere.⁸⁴

This combination of influence messaging and coordinated diplomacy has achieved what Russian strategists appear to seek for competitive advantage. They do not aim for an outpouring of public support for Russia in an area of strategic U.S. influence. Instead, Moscow pursues studied neutrality across LAC that leads key allies long considered to be close to the United States not to support U.S. policies that impact Russia.

Beyond Russia's influence on Latin America's public opinion, diplomacy, and political dynamics, Russia does leverage other concrete initiatives. Moscow has been particularly drawn to developing relationships with countries that are part of the Bolivarian Alliance for the Peoples of Our America, which was founded by Cuba and Venezuela and includes Bolivia, Ecuador, and Nicaragua, among others. This loose grouping has looked to create economic alternatives to Western-dominated financial institutions, holds largely anti-U.S. views, and is led by populists seeking to retain power, making it a like-minded partner for Moscow.⁸⁵

Another important strategic initiative is the Russian National Committee for the Promotion of Economic Trade With Countries of Latin America (NK SESLA in English, CN CEPLA in Spanish), based in Santiago. NK SESLA's leadership team also serves as the directors of multiple other Russian state cyber warfare entities. Given the leaders' seniority and documents authorizing the entity to act on behalf of Russian intelligence services and the Russian military, it is likely that this network's primary purpose is connected to its roots in electronic intelligence, cryptology, and surveillance.⁸⁶

Among the formal members of the NK SESLA network is the Central Institute for Information and Communications. In 2016, Putin charged this institute with a core strategic mission of highest importance to the Russian state: building a multibillion-dollar integrated, secure communications network for the Russian military. It also is tasked with helping detect and deter cyber attacks.⁸⁷ This group was led by former KGB major general and Russian

army officer Alexander Starovoitov from 1998 until his death in March 2021, when he was buried as a hero of the Russian state.⁸⁸ Further demonstrating the linkages between Russian cyber strategy and its presence in Latin America, when Starovoitov died he had been serving simultaneously as director of the institute, president of the Russia-Chile Business Council, and director general of a parastate consortium to “jointly solve the problems of the creation and development of advanced information technology, computer hardware, and microelectronics” for the Russian state.⁸⁹

Unable to afford “gifting” advanced surveillance platforms to partner nations as China often does, Russia sells them to LAC customers through a consortium of Russian state and quasi-state actors operating under the NK SESLA umbrella.⁹⁰ Russian surveillance technology has been widely used to prop up the region’s most authoritarian regimes, including Nicaragua and Venezuela, by allowing the governments to target dissidents, journalists, human rights groups, and political opponents with greater efficiency and speed.⁹¹

One of NK SESLA’s important roles in the hemisphere has been to facilitate the expansion of Russia’s premier cyber security firm, PROTEI ST Cybersecurity and Surveillance Company. The firm is a subsidiary of NTC PROTEI. PROTEI is the largest provider of technology compliant with the Russian government–mandated System for Operative Investigative Activities (SORM in Russian). SORM allows the Russian government access to all communications and was established in 1996 and is licensed by the Russian Federal Security Services (FSB).⁹² As one recent study found:

*By 2015, an updated version—SORM-3—would encompass all communications. Under Russian law . . . [Internet service providers] and telecom providers are required to install SORM equipment, providing the Russian FSB access to all data shared online without companies’ knowledge or control of which data are being shared and with whom. SORM works by basically copying all data flows on Internet and telecom networks—sending one copy to the government and the other to the intended destination. SORM is the FSB’s “backdoor” to Russia’s Internet.*⁹³

U.S. Strategic Objectives, Capabilities, and Limitations, 2025–2030

Despite the significant resource and personnel and strategic priority limitations the United States faces in LAC due to its global demands and activities, there are some strategic advantages that Washington could prioritize in the 2025–2030 time frame. The first is securing global supply chains through enhanced regional trade and *nearshoring*, which means that “companies are progressively transferring part of their production to countries close to their markets and with similar time zones, in order to minimize the effects of disruptions in supply chains” to decrease hemispheric dependence on China.⁹⁴ In 2023, for the first time in two decades, the United States bought more goods from Mexico than from China. This shows how global trade patterns are shifting away from China, due both to supply chain weaknesses revealed during the COVID-19 pandemic and to deteriorating relations between the two countries.⁹⁵

As the electoral pendulum in Latin America continues to swing from right to left and back again, the United States has significant opportunities to rebuild frayed alliances. One important glimpse of this potential came in late 2023 when, after seating a new President from the opposition party, Argentina canceled tentative plans to spend \$664 million on Chinese Chengdu-PAC JF-17 Thunder jet fighters and instead secured an agreement with Washington to purchase 33 used U.S.-made F-16 Fighting Falcon aircraft from Denmark.⁹⁶ This was a significant setback for China, which until then had lost few military hardware bids in the hemisphere.⁹⁷

Another targeted infrastructure competition success that Washington may build on is that which has kept PRC state companies from acquiring control of urgently needed water supplies for the Panama Canal—now at its lowest water table level in decades and with the fewest number of ships crossing since the 1980s. The viability of the canal depends on completion of several new dams, at a cost of billions of dollars. Initial PRC efforts to acquire the contracts through nontransparent bids with the Panama Canal Authority were challenged by the United States and recompeted with openly published engineering and risk standards, resulting in the U.S. Army Corps of Engineers being placed in charge of designing both the project and the upcoming bidding process.⁹⁸

PRC Strategic Objectives, Capabilities, and Limitations, 2025–2030

The most likely themes of Great Power interaction involving China in LAC from 2025 to 2030 will turn on Beijing's political and societal influence. Can China convert its past commercial and infrastructure investments into the kind of influence that threatens the survival of democratic and rule of law–based governance in the region? Or will the United States and its partners demonstrate resilience in building more robust alliances and partnerships to create transparency, combat transnational criminal organizations, enhance environmental protections, and foster free trade? In each of these areas, the strategic interests of the United States and China are diametrically opposed. Within this regional rivalry to establish the norms, rules, and frameworks for political, economic, and societal activities, the key issue is whether China can turn almost two decades of massive infrastructure development and investment programs into ones producing durable political and security inroads across the region.

One dimension will feature Sino-American competition for control of and access to key maritime supply chain nodes and ports, including the Panama Canal. As noted, the canal's water supply will require billions of dollars in investment soon. Control of its infrastructure upgrade projects will become a focal point of the Sino-American strategic competition around 2026 when the bidding process opens.

Dredging and port construction in Magdalena Channel between Argentina and Uruguay and the 1,300-mile Hidrovía del Paraná will be a second point of geostrategic infrastructure competition. There, Washington and Beijing will determine which of the two will establish the engineering, commercial, and security standards for the key riverine trade link from Bolivia and Brazil through Paraguay to Argentina and Uruguay⁹⁹ (see figure 13.3). Oversight of the Argentine port of Ushuaia will be a third major competitive flashpoint. Ushuaia is a vital access hub for exploration and development of Antarctica. No decision by



Figure 13.3. Magdalena Channel. Source: Damián Profeta, “Argentina Looks to Open New Route to the Sea for Foreign Trade,” *Dialogue Earth*, September 20, 2022, <https://dialogue.earth/en/business/58566-argentina-magdalena-canal-new-route-foreign-trade/>.

the major countries on the riverine artery has been made yet, and the PRC, after initially receiving permission to build a dual-use port in Ushuaia, has seen the plans placed on hold.¹⁰⁰

Sino-American competition in the field of deep space exploration will also intensify across LAC. China now has 11 space facilities there and at least 1 more under construction. U.S. Space Command in 2022 identified the space domain as a key strategic area for defending the United States.¹⁰¹

Beijing and Washington will increasingly compete for access to key natural resources such as lithium, cobalt, and rare earth minerals in the hemisphere as well as broader trade issues. China holds a wide advantage in accessing strategic minerals across LAC through its often corrupt, nontransparent negotiations with host governments and sub-state authorities.¹⁰² The United States cannot succeed alone in this important commercial competition because it lacks the money and regional trust. It can only counter the truly important Chinese advantages through public/private alliances with European allies, Japan, and related consortiums.¹⁰³ Ensuring competitiveness in “new infrastructure” and related sectors for LAC will require a continuous commitment by Washington and these partners to building and supporting the most critical infrastructure projects like pipelines, ports, airports, and mineral projects and to delivering products and services at price points that can compete with China’s subsidized offerings. Both the European Union and the United States remain critical economic partners for Latin America and are contributing in ways that China is not. Still, complacency risks allowing China to take the lead in emerging industries in the region.¹⁰⁴

The United States and China will compete for strategic advantage in 5G technology and other aspects of telecommunications and data transmission. China, through Huawei and other enterprises, holds a significant edge in building the LAC strategic communications architecture that will likely remain in place for decades. As in the case of strategic

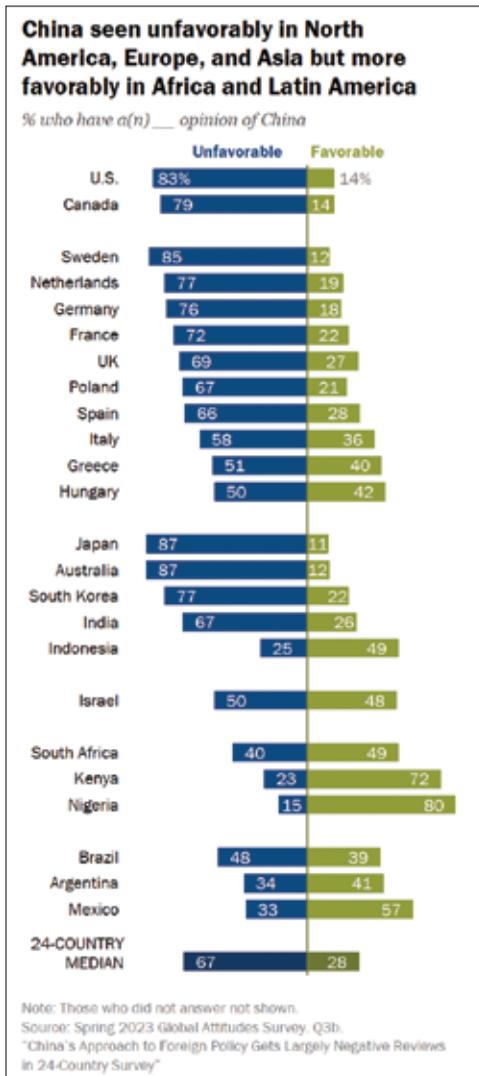


Figure 13.4. Global Views of China, 2023. Source: Laura Silver et al., "Views of China," Pew Research Center, July 27, 2023, <https://www.pewresearch.org/global/2023/07/27/views-of-china/>.

mineral access, the United States will have to counter China through public/private alliances with European allies and consortiums.

All three Great Powers, but especially China and the United States, will engage in intensifying competition over information, disinformation, and messaging operations on key strategic issues such as democratic governance, environmental protection, and sustainable development, rule of law, and transparency. LAC public perceptions in these areas will help determine whether the United States will have the opportunity to build new, vibrant democratic alliances or whether the authoritarian wave will continue to rise¹⁰⁵ (see figure 13.4).

Russian Strategic Objectives, Capabilities, and Limitations, 2025–2030

As with China, the mostly likely themes of Great Power interaction involving Russia across LAC during the 2025–2030 period will focus on the political future of the region. Russia's limited economic resources and its constrained military reach mean that Moscow will likely enrich and extend its active disinformation campaign efforts and seek new ways to introduce Russian technical and tactical elements into domestic and transregional agents of anti-Americanism and unrest. Each of these efforts will aim to contest the survival of democratic, rule of law–based governance

in the region, transparency, and economic competition. The key elements of competition that strategic rules and norms prevail over in these areas likely will involve four key areas.

First, Moscow will intensify its competitive disruptive information programs to overmatch the United States in messaging, narratives, and public opinion. In the areas of dis/misinformation and messaging, Russia currently holds a significant advantage and will likely continue to do so given that the United States and traditional media offer little in the way of effective offset.¹⁰⁶ Disinformation operations represent an integral part of the Putin government's permanent, multifaceted, and integrated "nonlinear warfare" against the United States. Moscow will likely expand its role in advancing authoritarian, anti-U.S.

leadership in the region, building on its important role in the consolidation of the two most authoritarian regimes—Maduro in Venezuela and Ortega in Nicaragua. These authoritarian successes are danger signs for U.S. strategic goals and heartening signs for Putin's art of the possible in a region where Russia should be at a disadvantage.¹⁰⁷

Second, Russia will likely seek to increase the sale and use of its preferred surveillance and tracking technology primarily to authoritarian, anti-U.S. regimes and transnational criminal organizations. With this activity, Moscow can directly undermine U.S. strategic goals of democratic governance and combating transnational criminal organizations (TCOs). Both authoritarians and TCOs are key tools to undermining the rule of law, spreading corruption, and curtailing U.S. interests.¹⁰⁸ Again, this is an area of significant Russian advantage and, given the legal limits and conditions on U.S. technology transfers, one that will be hard to change in coming years.

A third key area of competition involves diplomatic influence among Latin American nations. As noted, Russia's cadre of skilled Spanish-speaking ambassadors with regional expertise contrasts with Washington's recent practice of leaving key ambassadorships vacant and others filled with non-Spanish speaking political appointees.¹⁰⁹ The United States has sufficient resources to counter Russia's diplomatic advantage but must make the investment to compete properly. The nation that can leverage high-quality and sustained diplomatic ties will have an advantage in pursuing its national interests across LAC.¹¹⁰

Fourth, Russia will compete for influence and strategic advantage by providing weapons systems and surveillance technology (including satellite surveillance access) around the region. Even though the ongoing war in Ukraine seems likely to take priority for Russian munitions and military equipment for some time to come, this important element of Russia's playbook across the Global South and in LAC for most of the 21st century will not disappear. Operating through allies and partners like Iran, Russia should be expected to continue providing some limited amount of sophisticated weaponry to friendly LAC regimes such as Venezuela and Nicaragua. Until appropriately countered, the flow of Russian surveillance and defense technology will increase regional instability and frustrate U.S. strategic aims.

Recommendations

There is widespread interagency recognition that the United States alone cannot conduct asymmetrical competition with China across LAC in general and will be challenged to act in isolation to counter China even in the key strategic areas of deep space/satellite infrastructure and 5G technology ascendance. Instead, and as noted in multiple policy and strategy papers, Washington's competitive efforts must be done in partnership both with other Latin American allies and with democratic partners in Canada, Europe, Japan, and elsewhere.¹¹¹ U.S. competition with Russia across LAC is on a narrower set of strategic interests but still challenging to confront Russia's expanding influence. American strategic competition success against its rivals in LAC requires significant increases in financial commitments to the region and interagency commitments to long-term collaboration within the region and among like-minded international partners.

In both Sino-American and Russo-American strategic competition across LAC, Beijing and Moscow have overlapping interests in displacing the United States and undermining

democratic norms. To counter these aims, the U.S. interagency community should focus on broad, persistent messaging about the corrosive impact of corruption, erosion of freedoms, and institutional transparency. It also should intensify messaging exposing the ongoing support of both Russia and China in providing surveillance equipment to enable LAC governments' monitoring of perceived enemies, the media, and political adversaries. This kind of public exposure countering massive disinformation campaigns by both Russia and China should be a regional priority. Small existing U.S. messaging efforts offer useful templates for such an expansion through the State Department's Global Engagement Center, the National Endowment for Democracy, and the United States Institute of Peace.¹¹² The outcome of competition in this information space will be fundamental in determining how much operating room China and Russia will have to establish their rules, norms, procedures, and strategic access across LAC during the 2025–2030 period.

To effectively compete with China, the United States should take a series of actions, including:

Operationalize for LAC the strategic priorities of multilateral cooperation as outlined in the National Security Strategy.¹¹³ In order to do so, develop a whole-of-government strategic framework for engaging in multilateral competition with China across LAC, including clear priorities and a country-by-country alignment within the framework. While China has made notable gains in key sectors around LAC that are unlikely to be reversed, the United States has had some notable successes. Operating within combined strategies with G7, Canada, and Latin American allies whenever possible would be a significant force multiplier. The focus should not be on rolling back PRC gains unless tactically viable. Rather, U.S. efforts should focus on limiting PRC attempts at program expansion while assuring that LAC countries have viable alternatives to Chinese offers for strategic megaprojects and infrastructure expansion access in vital sectors such as 5G, technological innovation, port acquisitions, and strategic infrastructure and development.

Establish a particular focus on the key strategic areas that China now dominates, especially deep space activities, 5G and digital infrastructure, electrical grids, ports, strategic waterways, and key extractive minerals such as lithium and copper. The coordination should focus on partnerships with the private sector—likely in the form of consortiums of multiple countries—to offer competitive bidding in areas where China often faces no competition.

Designate an interagency coordinating group, likely at the National Security Council, both to formulate and implement the U.S. strategy for LAC and to adjust it to new realities on the ground there. Geographic divisions within the State Department (for example, the Western Hemisphere and Asia) have difficulty in coordinating activities and policies between themselves as well as with other State entities such as the Global Engagement Center and other key strategic partners such as USSOUTHCOM. This has led to fragmented policy priorities and siloed U.S. efforts across LAC that often are out of sync with each other.¹¹⁴

Consistently appoint experienced, effective, and linguistically capable Ambassadors to key Embassies in the region. Appointed Ambassadors are necessary to coordinate the implementation of this strategy because they speak more credibly and authoritatively for the U.S. Government and its multiple interests than acting Ambassadors.¹¹⁵ The absence of Ambassadors for years in the region is widely viewed as a key indicator of a U.S. lack of engagement.¹¹⁶

Expand and enhance U.S. programs that train journalists and civil society in accountability reporting and investigative techniques to compete with China for the best and brightest minds who often go to China by default. Perhaps more important, this develops a cadre of credible voices that can find and expose ongoing corrupt Chinese practices in acquiring bids as well as document massive environmental damage, loss of indigenous lands, and other key issues that can present an accurate picture of China's negative influence on key areas people care about.

Develop and expand programs to detect and expose false Chinese narratives and disinformation campaigns, partnering with, for example, the small but highly effective programs underway through the National Endowment for Democracy, United States Institute of Peace, Atlantic Council, the Inter-American Dialogue, and the Center for Strategic and International Studies.

To effectively contest Russia across LAC in the coming half decade, the United States should:

- Prioritize the baseline mapping of Russian LAC influence operations, both regionally and on a country-by-country basis, including financing of political campaigns and other direct interference in democratic governance.
- Develop effective counternarrative strategies across the interagency community and in coordination with G7 allies and regional partners. To succeed, these counternarratives must put out a broader coherent and persistent understanding of Russia's invasion of Ukraine and in defense of democratic governance and rule of law.
- Take a more proactive approach in monitoring, disrupting, and exposing the sale of sophisticated surveillance equipment across the region, including likely corrupt and criminal actors. These sales empower Russia's authoritarian allies and undermine the rule of law while providing resources to the Putin regime.
- Make host countries' relationship with Russia a priority in U.S. regional policy, both by monitoring dual-use purchases and sanctions evasions and by providing economic alternatives in key Russian export markets such as fertilizer in the region.

The United States has lost significant ground in Latin America despite having multiple strategic advantages that can be leveraged to reduce the economic gains of the PRC, counter disinformation from both Russia and China, and provide crucial support for democratic governments upholding the rule of law. Reversing this trend is possible in the coming decades if strategic competition is properly understood and sustained efforts are made to counter our adversaries.

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