The image features a close-up, diagonal view of the American flag on the left and the Chinese flag on the right. The American flag shows the blue canton with white stars and the red and white stripes. The Chinese flag is a solid red field. The text is overlaid on the bottom half of the image.

**The Role of Pivot States in
The Competition Between
The United States & China**

The Role of Pivot States in The Competition Between the United States & China

By Javin Aryan, Ralph El Jalbout, Mai Nguyen, Samuel Oswald,
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Abstract

The leading powers of the Global South today have more agency than at any time since the end of World War II. These are countries that have significant leverage in geopolitics but are less powerful than the world's leading powers — the US and China. Their numbers include India, Brazil, South Africa, and Saudi Arabia. These pivot states are nonaligned, highly transactional, and self-interested, and free to create new power dynamics. All four of them are members of the G-20 and are active in both geopolitics and goeconomics. These powers have become and will continue to become more powerful geopolitically. A better understanding of pivot states' strategic interests, priorities, and leverage has thus become essential for predicting the trajectory of the shifting geopolitical environment. This project seeks to determine the relationship of the pivot states with both China and the US, analyze the unique leverage they each have vis-à-vis the two blocs, compare their relative strategic importance to them, and tease out potential concessions they might be able to extract from China and the US.

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Executive Summary

This project has been compiled on behalf of the Eurasia Group, a consultancy firm that provides the marketplace with a comprehensive set of political risk solutions. Their clients range from macro hedge funds to institutional investors, including world's largest multinational corporations. The aim of this report is to shed light on the political risks for the US that arise from Pivot States' behavior within the context of competition between the United States and China. In turn, this report provides qualitative tools for clients to anticipate and manage the risks and challenges.

First, Pivot States are countries with significant leverage in geopolitics that are nonaligned, highly transactional, self-interested, and semi-autonomous. The case studies in the report focus explicitly on India, Brazil, South Africa, and Saudi Arabia. All four are members of the G-20 and are active in both geopolitics and geoeconomics. The objective is to determine the relationship of these states with the U.S. and China, analyze the leverage each has vis-à-vis the two great powers, and tease out potential concessions they might be able to extract as a result of competition. Consequently, a better understanding of pivot states' strategic interests, priorities, and leverage will be essential for predicting the trajectory of the shifting geopolitical environment in the next 5-7 years.

Second, this report operates on the assumption that key nations in the Global South wield unprecedented agency since the conclusion of World War II. By surveying several periods of international power structures, we will demonstrate that contemporary pivot states possess more political space to maneuver and form interest-based partnerships. Yet, how they manage to continue to do so becomes unclear under the assumption that the U.S.-China bilateral relationship will continue along a path of managed decline.

Therefore, this report qualitatively estimates the trajectory that these pivot states are likely to follow over the medium-term future and examines whether the states exhibit trends of convergence — aligning their security, economic, technological, and global challenges cooperation (e.g., climate and health) with another stronger state — or divergence in these areas. This analysis allows an assessment of the implications of pivot states' strategic orientations towards the U.S. and China and, in turn, how these superpowers might need to adjust their strategies to accommodate Pivot States' interests and autonomy. The U.S.-China competition, power dynamics, and state interactions outlined contribute to discussions on strengthening alliances, reshaping norms and institutions, supporting economic development, and accelerating solutions to global challenges.

Our current prediction, in the medium-term over the next 5 to 7 years, is that steady deterioration in the U.S.-China relationship will presumably constrain the pivot states' maneuvering room to multi-align themselves across sectors and may reduce their political space and ability to extract concessions. While each country has case-specific trends, we see the overall picture as follows: most countries will continue to align with Washington as a security partner and with Beijing as an economic partner. In terms of technologies and global challenges, Pivot States will likely witness increased competition between the U.S. and China, accompanied by more political space to maneuver, extract concessions, and maintain their strategic independence and autonomy in these policy areas.

This report adds to the current knowledge gap in international relations theory in understanding and predicting the dynamics and stability of a multipolar world order. Traditional theories provide frameworks to analyze the behavior of Pivot States within bipolar and unipolar contexts but often fall short of comprehensively addressing the complexities and nuanced interactions in the multipolar world of today. Additionally, competition between the U.S. and China to influence pivot states clearly indicates these countries' strategic importance. It reflects an understanding that, in a multipolar world, the alignment of these states can collectively shift the global balance of power. This report adds to the existing literature by focusing on the needs and interests of the pivot states themselves.

Finally, building this report with implications and projections is essential for policymakers and scholars to manage the risks and take advantage of the opportunities presented by pivot state behavior in the 21st century more effectively. The competition and ensuing foreign policy changes directly impact market access, regulatory environments, and the security of intellectual property. The tensions between these two economic powerhouses can lead to sudden shifts in tariffs, sanctions, and technology restrictions, affecting global supply chains and investment decisions. This increases the need for businesses — such as our clients' — to understand the geopolitical implications. With access to this report's risk analysis and projected dynamics, companies can better navigate complexities and exploit emerging opportunities throughout global markets.

Introduction

GREAT POWER COMPETITION | DEFINITIONS

RESEARCH QUESTION | METHODOLOGY | OBJECTIVES



Great Power Competition

The shifting dynamics of global power over the last several decades underscore a complex evolution from a bipolar world, characterized by the Cold War standoff between the United States and the Soviet Union, to a unipolar moment dominated by the U.S. and to present day, the latest phase marked by the ascendance of China. Rising tensions between Washington and Beijing are dramatically altering the strategic landscape, with far-reaching implications for international relations. The competition unfolding is not limited to any single domain but spans multiple arenas, including security, economics, technology, and managing global challenges. This complex interplay reflects the U.S. and China vying for influence and leadership, including among a series of pivot states. On the other hand, pivot states find themselves faced with a great power competition that represents either uncertainty and risk or opportunities. How pivot states navigate the great power competition will determine the attainment of their national interests.

Definitions

Pivot States | Swing States

In the scope of this paper, a pivot state is defined as a middle power that has extensive regional sway and developed global influence. A pivot state employs leverage to achieve strategic goals and gain concessions from the U.S. and China in the context of their great power competition. The adjective “pivot” is attributed for two reasons: (i) the state’s decisive nature in the U.S.-China competition; and (ii) the behavior of aligning with one of the two powers on an issue-by-issue basis. A pivot state is different from a swing state. Pivoting is considered a repetitive game, where a country would lean on one of the great powers in a specific sector or for a particular reason and pivot to the other power for different matters. In contrast, swing states make a one-time move to position within the alternative camp with complete alignment across policy areas.

Strategic Autonomy | Leverage | Vulnerabilities

Strategic autonomy refers to the capacity of a state to pursue its goals within the limits of its capabilities and vulnerabilities. To achieve this, leverage is essential and encompasses a state’s advantages, resources, and capital that both the U.S. and China seek to obtain. However, vulnerabilities impede the path to strategic autonomy by rendering a state susceptible to exploitation by the great powers. Categorized as either inherent or structural, vulnerabilities are shaped by geographical, social, economic, and environmental factors.

Interests | Grand Strategies

To navigate vulnerabilities, states formulate interests and grand strategies. These are the domestic and international strategic goals a state aims to attain through foreign policy decisions. Issue-based partnerships with the U.S. or China demonstrate a strategic approach to exacting upon interests and grand strategies within the complexities of global politics.

Pivot State Behavior in Summary

Pivot states are middle powers that wield significant influence over regional and geopolitical matters, embodying all the previously described attributes, but distinctly characterized by their intent to navigate and shape international dynamics and benefit from the U.S.-China competition.

Research Question

This research spans the period from 2008 to 2023, encompassing the global economic crisis and significant political developments following Xi Jinping's accession to power. This period is marked by profound transformations in the global order, making it a fertile ground for examining the dynamics of pivot state behavior vis-à-vis the U.S. and China. We explore these dynamics, suggesting revealed pivot state behavior in the near term through the lens of “managed decline.” Managed decline refers to a strategic deterioration of the bilateral U.S.-China relationship with increased competition rather than an abrupt disengagement between the two powers. The two recognize and have time to adapt to their mutually diminishing cooperation, seeking to control the pace and consequences of the denigration to preserve stability domestically and in the international order in their image. Under the assumption of managed decline, no U.S.-China-related “tail-risk” events will radically alter the strategic calculations of our pivot states. Ultimately, this paper aims to answer two central questions. First, how have the pivot states maneuvered within the U.S.-China competition between 2008 and 2023? And, if U.S.-China relations continue along a pathway of managed decline, such as a conflict in the South-China Sea, how will pivot states behave?

Methodology

Six countries were identified as pivot states of particular interest to the Eurasia Group: India, the Kingdom of Saudi Arabia (KSA), Brazil, South Africa, Indonesia, and Turkey, in order of priority. Vietnam was additionally considered. This paper will concentrate on an in-depth analysis of India, KSA, Brazil, and South Africa, as they represent four major areas of the globe. The selection of these countries is aimed at providing a comprehensive understanding of the dynamics at play within diverse geopolitical landscapes. This view will allow for a nuanced exploration of how pivot states operate within and across regions, offering insights into their roles, strategies, and the implications of their actions on global power structures.

Our methodology for this study is designed to provide a comprehensive examination of the role and positioning of pivot states within the context of the U.S.-China competition, articulated across four key sectors: security, economics, technology, and global challenges. To achieve a nuanced understanding of these dynamics, we will employ a matrix-based approach that facilitates comparative analysis across these domains. This structured analytical framework will enable us to initially dissect the intricate nature of U.S.-China competition within these sectors, setting the stage for an in-depth case study analysis of each country.

For each case study, we will identify the assets or strengths that render these states attractive or important to both the U.S. and China, including but not limited to natural resources, strategic trade routes, market access, supply chain significance, technological prowess, sanctions enforcement capabilities, and geographical location. Moreover, we aim to elucidate what these countries seek to achieve on the global stage, focusing on their strategic interests, whether they are national, regional, or global in nature. Then, we will explore how these states can advance their interests by leveraging their unique assets and strengths in their relations with the U.S. and China. Finally, we will analyze how these pivot states have historically leveraged their respective assets and pivot status to their benefit. Considering the ongoing deterioration of U.S.-China relations, we will assess the interests of these pivot states and their future ability to leverage their status to achieve their interests. This approach will ensure a thorough and insightful exploration of the pivotal role these states play in shaping the global order amidst the evolving dynamics of U.S.-China relations.

Objectives

Our objective is to qualitatively estimate the trajectory that these pivot states are likely to follow over the next 5-7 years. We will examine whether the states exhibit trends of convergence, aligning their security, economic, technological, and global issue cooperation with another state, or divergence in these areas. To operationalize this, we will assess whether these states align, misalign, or pursue multi-alignment strategies, particularly by analyzing policy shifts over time across each sector. This approach will enable us to identify patterns of “revealed interests” based on their past and present actions. By understanding these patterns, we aim to predict behavior and orientation in the coming years.

This analysis will enable us to assess the implications of pivot states' strategic orientations for the United States and China, providing insight into how these superpowers might need to adjust their strategies to maintain their influence and autonomy. It will also facilitate an evaluation of whether the ascendancy of increasingly influential pivot states serves to stabilize or destabilize the global order. Furthermore, by examining the implications of pivot states' rise, we can gain a deeper understanding of its impact on the shifting balance of power. This inquiry will lead us to evaluate potential policies that China and the US are likely to adopt in response to the dynamics of pivot states. By synthesizing our findings and recommendations, we aim to deliver a concise briefing to the Eurasia Group, offering strategic insights that encapsulate the complex interplay between pivot states and major powers, and proposing actionable strategies for navigating the evolving geopolitical landscape.

Evolution of Pivot States

BIRTH OF PIVOT STATE THEORY | COLD WAR BIPOLARITY

POST-COLD WAR UNIPOLARITY | MODERN DAY MULTIPOLARITY



Birth of Pivot State Theory

The term “pivot” was coined by Halford Mackinder in 1904. According to his doctrine, a political actor dominating important geographical locations known as the Heartland or Pivot would possess the potential to control the rest of the world. The core of Mackinder’s argument focused on competition and the interlinkages between land control and political power. With time, control over geographical territory was expanded to include partnerships with states in the Pivot. As such, we examine how, through different periods of world history and various structures of the international order, the role of pivot states has evolved into its current functionality framed by the U.S.-China competition. We consider the two great powers as vying for global leadership through partnerships and alliances, resulting in an expanded maneuvering space for pivot states to dictate terms towards their own national interests.

Cold War Bipolarity

The Cold War period was underpinned by the polarization of states into two hostile coalitions. The great power competition between the Soviet Union to expand and the U.S. to contain regarded pivot states with strategic importance. Washington believed that by containing the Soviet Union’s expansionism long enough, Moscow would eventually allow for a negotiated settlement with Washington. Washington would identify a country important for regional stability and take measures to prevent its fall into the Soviet Union’s sphere of influence. This required the U.S. to increase pressure on pivot states to choose their alignment explicitly and completely. Admittedly, the countries considered pivotal were offered benefits to align themselves with one of the dominating powers, though they had little choice but to choose a side. In other words, the maneuvering space for pivot states during this period was limited.

Post-Cold War Unipolarity

The Soviet Union’s collapse transformed the bipolar Cold War international order into a new order in which the U.S. was the sole remaining superpower. Washington further consolidated its prowess by expanding geopolitical and ideological ambitions worldwide. The U.S. influence expanded through its bilateral ambitions in each region and rules-setting multilateral organizations. It was thus assumed at that time that the magnitude of U.S. power was so overwhelming that other states had no chance to close the power gap. Therefore, Washington was viewed as the sole partner through which other states could attain national interests. For instance, during this period, the U.S. model was hailed as the only way to economic prosperity. This era of unipolarity effectively limited the range of pivot state behavior with a set of subtle incentives and disincentives. In other words, maneuvering space for pivot states in this period was also limited.

This unipolar order did not, however, end great power competition. Instead, it fostered sentiments that later became a source of competition and conflicting interests among states that did not share Washington’s perspective.

Modern Day Multipolarity

After the 2008 global financial crisis, Washington's capabilities no longer matched its reputation worldwide. With the growing power of other regional leaders, the international order entered a disequilibrium with competition for resources and markets, military power, political influence, prestige, and agenda setting. At the same time, China and other states rose as emerging economic powerhouses, thus providing alternative economic options for other states to partner with for their own economic growth. Pivot states began to have more options. They could disengage themselves from Washington to a degree and diversify their relations with other countries that proved to have the capabilities and resources to assist in achieving their own national interests. This led China and other emerging countries to engage in strategies promoting multipolarity. Multipolarity allows states to align with more than one power structure across a variety of sectors without the threat of debilitating punishment from another power structure.

Beijing quickly shadowed other emerging countries, becoming the only country with potential capabilities that could directly oppose Washington. Aware of this opportunity, since the election of Xi Jinping in 2013, China has been more assertive and autonomous in the security space, has risen to the rank of second-largest economy, competes for control of critical technologies, and has developed its own brand on global issues. As such, U.S.-China relations under geopolitical, economic, and technological pressures have transformed key dimensions of the international order.

Over the last decade, interstate rivalry and capitalist competition have afforded leverage to pivot states that possess military, economic, or ideological assets coveted by the U.S. and China. Whereas during the Cold War Era and post-Cold War period, pivot states were considered to have little room to maneuver, they are now increasingly independent collaborators in strategic alliances, the hosts of crucial economic nodes with far-reaching geopolitical implications, and incubators of technology and ideological innovations toward addressing global challenges. Thus, the U.S. and China have an opportunity to respond to pivot states by meeting their ambitions as partners.

Nature of Competition

COMPETITION BETWEEN GREAT POWERS

SECURITY COMPETITION | ECONOMIC COMPETITION

TECHNOLOGY COMPETITION | GLOBAL CHALLENGES COMPETITION



Competition Between Great Powers

The U.S.-China competition is a multifaceted geopolitical rivalry. This rivalry reflects the broader shift in global power dynamics as China seeks to assert its influence and challenge the longstanding dominance of the United States. To understand the wide-range competition between Washington and Beijing, we have chosen four sectors: security, economics, technology, and common global challenges for analysis.

Security Competition

The basic nature of the U.S.-China security competition can be best understood by considering fundamental national interests, why these interests are valued so highly, how these interests motivate military and diplomatic behavior, and why these interests and behaviors create competition. Concisely, the U.S. aims to leverage its armed forces, resources, and diplomatic corps to preserve the status quo of the rules-based order rooted in American values. Meanwhile, China is interested in reshaping the global order to accommodate its authoritarian political structure and continued economic expansion.

We utilize a common practice of distinguishing between “core” and “secondary” theaters of security competition. This distinction is helpful for methodically addressing stark variances in the intensity of military competition across different geographic regions. Core theaters are defined here as regions that are critical to the national security and vital interests of the great powers. As a result, great powers give top priority to core theaters in strategic planning and resource allocation. Secondary theaters cover regions where great powers’ objectives and interests are lesser or complementary to those in the core theaters and thus generally receive lower priority in strategic plans and resource allocation. In the U.S.-China security competition, the Indo-Pacific region is a core theater, while the Middle East, Africa, and Latin America are secondary theaters.

Consequently, the great power security competition creates leverage for Pivot States depending on their geographic location. For the U.S., the “tyranny of distance” that its military must overcome to reach Asia necessitates American negotiations with security partners for flyover rights, refueling stops, and repairs privileges; it also necessitates buy-in from nations that do business with China in order to enforce wartime sanctions. In turn, America’s own security priorities and weaknesses create leverage for Pivot States both in the region and beyond, as well as in both security and non-security sectors.

Economic Competition

Despite having deeply interconnected economies, the U.S. and China are engaged in an increasingly multifaceted and intense economic competition. This competition over cooperation stems from China’s moving up in the global value chain as a result of the country’s economic boom following the Reform and Opening of its industrial policy. China’s market reform and liberalization came to a standstill over the past decade, with some of the progress previously made reversed under President Xi. It continues subsidizing key sectors that it deems of strategic importance in the near future, such as electric vehicles, telecommunications, and semiconductors, slowly but steadily eroding market shares of U.S. companies all over the globe.

The U.S. and China are both global powerhouses, with competence in different types of industries, and competing for influence over international trade systems, investment flows, and economic standards. The U.S. has expressed concerns about trade imbalances, intellectual property theft, and market access in China, leading to tariffs and sanctions. Conversely, China has pursued policies like the Belt and Road Initiative to enhance its economic stature and connectivity with other parts of the world. The need for economic growth despite intense competition with one another persuades Washington and Beijing to look for other partners. Consequently, the U.S.-China economic relationship provides maneuvering space for pivot states.

Technology Competition

In the technology sector, the rivalry extends into critical areas such as 5G telecommunications, artificial intelligence, and quantum computing. The U.S. worries about the security implications of China's technological advances and its role in global supply chains, prompting efforts to restrict Chinese tech firms. On the other hand, China aims to achieve technological self-sufficiency and leadership. Washington's approach is characterized by its policy to "invest, align, and compete," wherein it is prioritizing domestic research and development and manufacturing, aligning its policy with those of its allies and partners, and competing with Beijing by restricting its access to U.S.-based technologies. China, on the other hand, is utilizing its vast state resources to invest in its own research and development and to acquire foreign technologies through circumventing restrictions and espionage.

On fifth and next-generation mobile technologies, the two countries have gone head-to-head to influence other states around the world. Washington has tried to make the case that equipment manufactured by China's Huawei poses a security threat leaving networks vulnerable to espionage, sabotage, and coercion. And, Beijing has sought to quell these fears, stating that this perception is wrong and biased, and labeled it as an attempt to suppress its technological advancement and economic prosperity. On quantum computing, due to its ability to enhance computing power, break modern-day encryption, and institute a new form of secure communications architecture, countries that develop and operationalize this technology will gain an enormous advantage. For this reason, both the U.S. and China are investing in this field.

Recently, the U.S. has adopted a focused industrial policy to enhance its domestic semiconductor ecosystem in the form of the CHIPS and Science Act. The Act aims to strengthen American supply chains, add domestic manufacturing jobs, and boost American semiconductor research, development, and production. This new approach is different from the kind of state-led industrial policy that is characteristic of the Chinese system in that instead of focusing on production numbers and output, it allocates investment for research and development, including workforce development, and incentivizes domestic production of semiconductors. The intensifying competition between the U.S. and China provides maneuvering space for pivot states to align and/or partner with these great powers in order to advance their national interests.

Global Challenges Competition

Both the U.S. and China want to lead in the campaign to solve global challenges and seek to modify international organizations accordingly. As China has grown as a regional player economically and politically in the recent decade, it has gained influence on decision-making powers in these organizations. China has successfully staffed key leadership positions in development organizations to enhance the country's image as a global leader while at the same time promoting Beijing's interests.

In recent years, China has also launched its interconnected Global Security Initiative (GSI) and Global Development Initiative (GDI) as a way for Beijing to formulate and sustain a new global governance system. This aligns with China's stronger push and leadership in South-South cooperation, which has been pushed as a counterweight for a more hierarchical and traditional North-South cooperation. China and the U.S. also engage in outright competition through exclusionary regional and global initiatives like BRICS and the Belt and Road Initiative (BRI) on China's side, and Indo-Pacific Economic Framework for Prosperity (IPEF) and Partnership for Global Infrastructure and Investment (PGII) on the US side.

The issue of human rights stands as a contentious point in the China-U.S. relationship, with divergent perspectives and approaches shaping the discourse. China's track record on human rights, particularly concerning issues such as freedom of expression, religious freedom, and ethnic minority rights, has drawn international scrutiny and condemnation. The U.S., along with its Western allies, has been vocal in criticizing China's human rights abuses, calling for accountability and reform. The competing narratives on human rights reflect broader ideological differences.

As global challenges require cooperative actions, it is assumed that both Washington and Beijing will show support of their positions in their respective regions as well as financial support for these states' projects and/or self-led organizations. These will serve as incentives to convince pivot states to align with either great power. In turn, this will give pivot states space to choose or to take advantage of to take concessions from both great powers.

Case Studies

METHODOLOGY | STUDY METRICS

INDIA | SAUDI ARABIA | BRAZIL | SOUTH AFRICA



Methodology

This section analyzes the alignment trends of four pivot states – India, Saudi Arabia, Brazil, and South Africa – across four sectors of competition – security, economics, technology, and common global challenges. Working sequentially through each sector, this report considers the interests of the pivot state itself, and the motivations for the great powers to collaborate with them. We identify the alignment trends of the pivot states in each sector between 2008 and 2023 by using the metrics defined in the previous section. Each sector analysis concludes with an assessment of the overall revealed preference. Throughout the case studies, we identify the leverages, vulnerabilities, and autonomy that guide the pivot states’ strategic preferences.

Study Metrics

Security Alignment Metrics

This section will use a matrix of qualitative and quantitative variables to analyze the depth and breadth of security cooperation between the pivot states with the United States and China. The matrix is designed considering the above discussion of the security competition and shaped by the established methodologies of the RAND Corporation. The selection of variables in the matrix is tailored to capture the multifaceted nature of military engagement and strategic posturing between the two superpowers. The six variables are:

1. Post-Cold War conflicts
2. Military alliances and partnerships
3. Strategic diplomacy
4. Annual arms sales
5. Military exercises
6. Military bases

Note that under “Strategic diplomacy” three resolutions will be taken into consideration: UN SC Resolution 1973 on Libya, UN GA Resolution RES/ES-11/1 on Ukraine, and UN GA Resolution A/ES-10/L.27 on Israel. The United States voted in favor of Resolution 1973 and RES/ES-11/1 and against A/ES-10/L.27. In contrast, China took a more neutral stance by abstaining on Resolution 1973 and RES/ES-11/1, while it supported A/ES-10/L.27. This divergence in voting patterns highlights the U.S. and China’s distinct diplomatic approaches and strategic interests within the framework of international relations and geopolitical priorities. Those three resolutions were chosen for their diplomatic value to both powers, thus making the voting pattern of Pivot States a significant signaling of their revealed behavior.

Economic Alignment Metrics

This section will delve into trade behavior, investment flows, de-dollarization, economic sanction alignment, and borrowing behavior (in the case of South Africa) to shed light on how the selected countries have pivoted economically at the state level in the context of U.S.-China competition for economic influence. Trade and investment measure the leverages pivotal states possess, while economic sanction alignment, de-dollarization, and borrowing behavior measure the degree to which pivotal states have gained autonomy or to which they have exposed vulnerabilities in making economic policies in these areas.

Technology Alignment Metrics

This section divides technologies into three categories: securitized (e.g., 5G, semiconductors, and artificial intelligence), non-securitized (e.g., cloud computing, domestic manufacturing of consumer electronics, and electric vehicles), and space-related systems (e.g., satellites). It then qualitatively examines how the pivot states have collaborated with technological entities from either the U.S. or China to demonstrate their alignment. These technologies were selected for their significant impact on the strategic and economic landscapes of both the pivot states and the great powers. Moreover, given the contentious nature of securitized technologies, alignment trends become evident when pivot states collaborate with U.S. or Chinese technological entities or both.

Global Challenges Alignment Metrics

This section will discuss four areas in which the U.S. and China both have great core interests throughout this report: multilateral initiatives, climate change, health, and human rights. Multilateral initiatives are a metric to show high diplomatic support and/or competition between great powers towards pivot states and the maneuvering room that pivot states can utilize to gain benefits. The last three are chosen to show a divergence of interests in climate change and health, but there can also be room for compromise. On the other hand, human rights issues are one of the most contentious areas between the two great powers.

India

SECTORS | OVERALL OBSERVATIONS



Security

India's security strategy derives from four main interests. First, it seeks to protect its territorial integrity. Second, India aims to avoid unnecessary escalations with China by managing its border disputes cautiously. Third, India prioritizes maintaining freedom of navigation through crucial maritime corridors in the Indo-Pacific, which are vital for its economy. Finally, India strives to achieve these objectives without getting entangled in complex alliance systems, favoring engagement over entanglement in its approach to security cooperation. However, the great power competition and Sino-Indian rivalry have limited India's diplomatic flexibility. As a result, New Delhi has gradually shifted from its traditional policy of non-alignment to a strategy of multi-alignment, with its relationship with Washington becoming increasingly significant. India is a crucial player in the Indo-Pacific region, which is the primary theater of the U.S.-China security competition. The U.S. views India as a key security partner to counterbalance China's rising influence. Conversely, China seeks to manage its border issues with India without exacerbating tensions, aiming to maintain a stable relationship.

Security Alignment Metrics

Post-Cold War Conflicts

The India-China border disputes lay at the heart of their complex relations. The 1962 Sino-Indian War and the resulting territorial changes have left a lasting imprint on their bilateral relations. The unresolved border issues continue to fuel tensions between the two nations. However, the lack of a subsequent war shows that India has been open to cautious engagement with its neighbor through diplomatic channels and confidence-building measures. Prior to 2008, U.S.-India cooperation in international conflicts was limited by the United States' strategic partnership with Pakistan, India's preference for non-alignment, and a trust deficit between the two countries.

Military Alliances & Partnerships

India has no treaty alliances with either superpower. However, its participation in the Quadrilateral Security Dialogue (QUAD) alongside the U.S., Japan, and Australia signifies a pivot towards the U.S. over their shared goals of a free, open, and inclusive Indo-Pacific region. The nature of India's partnership through the QUAD is fundamentally different from its multilateral engagement with China through BRICS, as the QUAD focuses more explicitly on security, maritime cooperation, ensuring a balance of power in Asia, subtly countering China's assertive posture in the region.

Strategic Diplomacy

India's voting patterns in the UN demonstrate a balancing act between the U.S. and China based on its strategic interests on specific issues. For example, it abstained in 2011 on the Security Council Resolution 1970, allowing the use of force in Libya, diverging from the U.S. approach. India's convergence with China is seen again in the vote supporting the General Assembly's resolution A/ES-10/L.27 on the war in Gaza in 2023. Conversely, India voted with the U.S. on UN General Assembly Resolution ES-11/1 on Ukraine. India's stance on Israel demonstrates its support for Palestinian sovereignty aspirations while balancing strong bilateral relations with Tel Aviv. India's willingness to engage constructively in international peace and security matters while remaining non-aligned with the West is demonstrated most clearly in its support for Palestinian sovereignty in multilateral fora while maintaining bilateral relations with Tel Aviv.

Arms Sales

As illustrated in Figure 1 on the following page, India has no recorded arms sales from the PRC. The volume of arms sales from the U.S. has increased markedly since the outset of the competition around 2008, though annual levels have fluctuated yearly. India threads the needle of multi-alignment within the security sector. This can be seen in Figure 2 on the following page, which illustrates the volume of Russian and French arms sales to India.

Military Exercises

India has engaged in bilateral and multilateral military exercises with the United States since the 1990s. Key multilateral exercises like Rimpac focus on bolstering the Indo-Pacific's security, aligning with India's interests. Participation in Rimpac, alongside 26 nations, sends a deterrence message to China with low risk of direct retaliation. Bilateral exercises like Yudh Abhyas prepare India's army for extreme environments like the Himalayas, enhancing defense capabilities along the border while warning against escalations. India shapes multilateral exercise agendas to suit its interests, initially resisting naval exercises in the QUAD but shifting stance post-2020 to strengthen foreign partnerships amid border tensions. In 2023, India resumed aerial exercises with the US and Japan, likely in response to PLA activities in Ladakh.

Meanwhile, all Sino-Indian bilateral military exercises have been suspended due to heightened tensions around the border region. For example, from 2007-2016 India and China conducted the Hand in Hand bilateral exercise, but suspended it indefinitely in 2017 due to an armed standoff in the Doklam plateau. Their history of multilateral exercises since 2008 have all been under the leadership of the U.S. – such as Rimpac – or other multilateral organizations – such as the ASEAN Defense Ministers' Meeting Plus Eight.

Military Bases

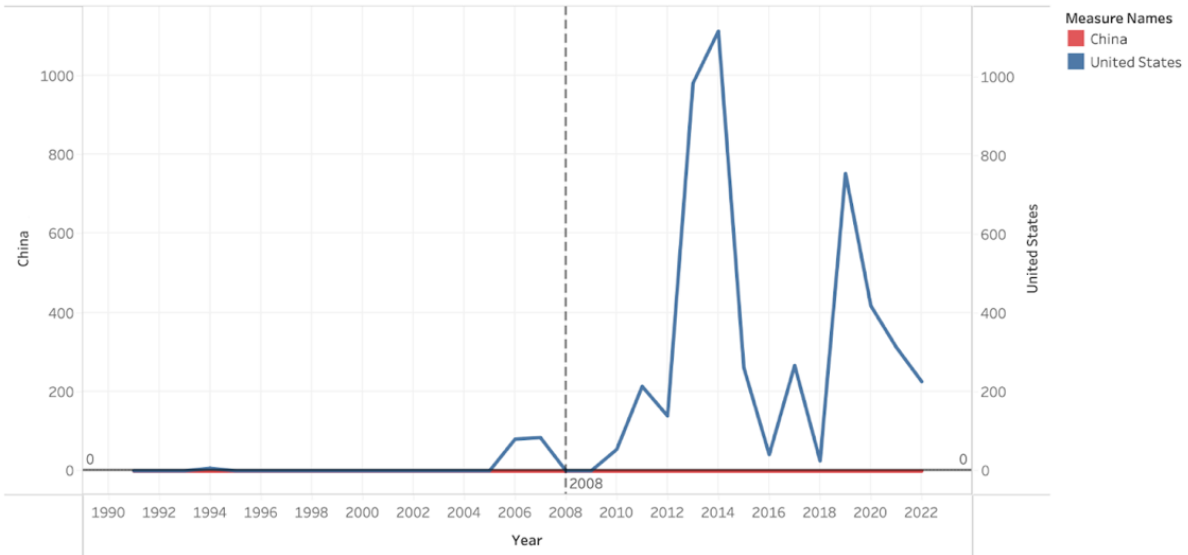
Consistent with its historic policy of non-alignment, India hosts no U.S. or PRC military bases. Even so, India has become increasingly open to U.S. negotiations for port access in response to the People's Liberation Army Navy's modernization and maritime aggression threatening free and open maritime navigation in the Indo-Pacific. In 2023, Prime Minister Modi and President Biden signed the Master Ship Repair Agreement, which grants the U.S. Navy the ability to repair, maintain, and resupply its ships and aircraft at shipyards near Chennai in southeast India. The next phase of negotiations will focus on similar privileges in Mumbai and Goa on the west coast of the country.

Revealed Preferences

India's behavior reveals a preference for closer cooperation with the U.S. in the security sector. India's geographic position is arguably its most important form of leverage in the context of the U.S.-China competition. India's location at the crossroads of the Indian Ocean and its proximity to the Pacific provide crucial control over major maritime routes that are vital for global trade and naval movements. India's substantial army, supported by its large population, represents another significant military asset.

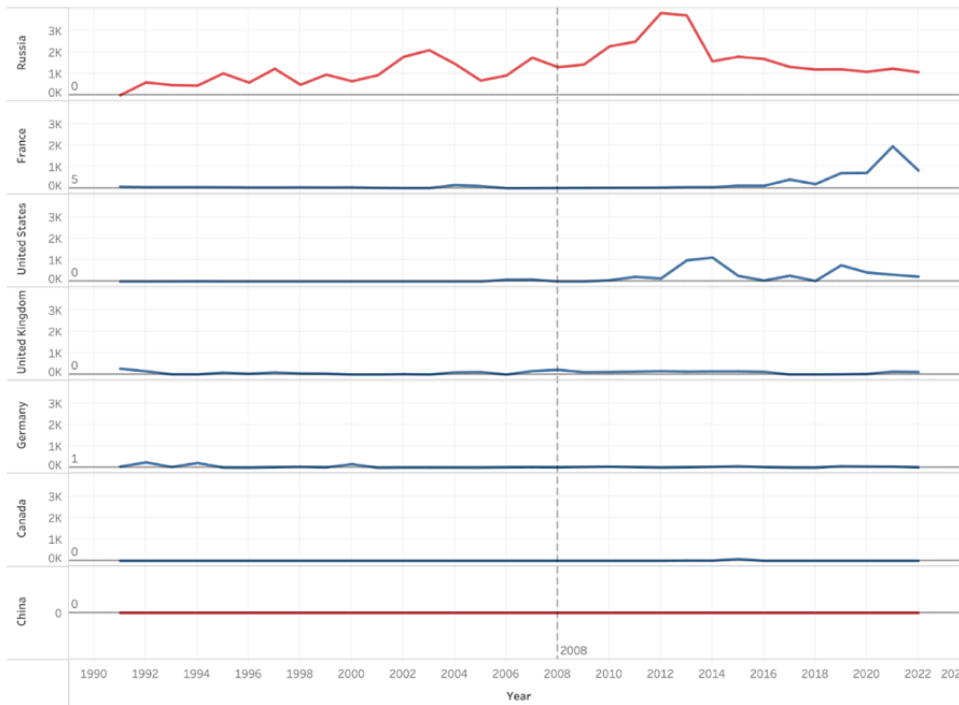
Despite strong overlap with U.S. interests in a free and open Indo-Pacific, India remains ideologically committed to its policy of being non-allied. This guides its cautious approach to security cooperation with the United States. In the future, however, its geographical proximity to China, the border dispute, and China's territorial and maritime ambitions could potentially limit its autonomy, prompting India to seek stronger security ties with the U.S. to mitigate this vulnerability. These forward-looking considerations will be explored in-depth in the Implications section of the report.

Figure 1. Comparative US-China arms sales to India, 1991-2022



The trends of China and United States arms sales to India from 1991-2022. Figures are measured in millions of SIPRI trend-indicator values (TIVs). The SIPRI TIV is a measure of the volume of international transfers of major arms. A '0' indicates that the volume of deliveries is between 0 and 0.5 million SIPRI TIV.
Data Source: SIPRI

Figure 2. Arms sales to India by country, 1991-2022



The trends of arms sales to India by key countries between 1991-2022. Countries are listed in order from highest to lowest aggregate value over time. The U.S. and partner countries are shown in blue. China and Russia are shown in red. Figures are measured in millions of SIPRI trend-indicator values (TIVs). The SIPRI TIV is a measure of the volume of international transfers of major arms. A '0' indicates that the volume of deliveries is between 0 and 0.5 million SIPRI TIV.
Data Source: SIPRI

Economy

India aims to reduce economic dependence on China, attract foreign investment, bolster economic autonomy by pursuing trade relations that align with its interests, and favorably leverage its position in the global market. India seeks to mitigate the vulnerability associated with a substantial trade imbalance with China and to foster economic growth and development to enhance its resilience in the face of geopolitical fluctuations. Economically, the U.S. is interested in India as one of the fastest-growing economies, leveraging its potential to replace China as the next manufacturing powerhouse that will be crucial to the friend-shoring strategy of the U.S. China, on the other hand, regards India as a competitor that could challenge its economic influence in the region and the rest of the world, but it also seeks to maintain trade ties with India whose large and growing domestic market is able to absorb China's industrial overcapacity.

Economic Alignment Metrics

Trade

India has a major trade deficit with China, which creates a vulnerability. Bilateral trade between India and China surged after China joined the WTO, with China becoming India's largest trading partner post-2008. However, the relationship has been imbalanced, with India facing a growing trade deficit, hitting \$87 billion in 2022 due to high imports of technology-intensive goods. Despite efforts to boost domestic production and increase import duties since 2016, reducing dependency on China remains challenging. India seeks strategic autonomy in trade but struggles due to the trade deficit, emphasizing the need to enhance domestic production and tackle market access issues. Meanwhile, the United States is India's largest export destination, though bilateral trade is relatively smaller for the U.S. Initiatives like the India-U.S. Trade Policy Forum and participation in the Indo-Pacific Economic Framework aim to enhance trade relations. However, friction has been prevalent throughout the competition due to tariffs and the U.S.'s termination of India's eligibility for preferences under the Generalized System of Preferences (GSP) program because of New Delhi's failure to provide assurances that it will provide equitable and reasonable access to its markets in numerous sectors. It was only recently in 2023 that the U.S. Trade Representative withdrew its last disputes within the WTO, signaling mutual accommodation in the two nations' trade policies.

Investment & Foreign Direct Investment

India has demonstrated a divergence from China in its efforts to diversify its sources of foreign investment. India moved FDI from China from the automatic route to a route that requires additional inter-ministerial scrutiny on a case-by-case basis. This shift was applied to FDI from all countries that share land borders with India, but its impact is primarily felt in relation to China. By subjecting Chinese FDI to additional scrutiny, India aims to safeguard its companies from opportunistic takeovers and dependency on China, reducing vulnerability to economic coercion. Meanwhile, the U.S. has been one of India's top sources of FDI inflows. The U.S. has become India's third-largest source of FDI, accounting for almost 9% of total equity inflows. On the other hand, since April 2020, India has only approved less than a quarter of the total 435 FDI applications from China, after the government tweaked the FDI policy to avoid opportunistic takeover of Indian companies. India has emerged as an attractive destination for FDI, particularly during the pandemic, with all-time low-interest rates and government initiatives to encourage growth in key sectors. In 2022, an Investment Incentive Agreement was signed between India's Ministry of Finance and the U.S. International Development Finance Corporation to facilitate equity investment, co-insurance, grants, feasibility studies, and technical assistance. By engaging in such agreements, India seeks to leverage its economic potential to attract investment to sustain development and growth.

Sanction Alignment

India's economic autonomy is evident in its trade relations with Russia, defying U.S.-led sanctions. Bilateral trade exceeded expectations, reaching \$50 billion in 2022-2023. This growth was fueled by discounted crude oil trade and increased exports of food and pharmaceuticals to Russia. India's refining of Russian crude and subsequent global sales aim to stabilize the oil market strategically. Russia's sale of oil to India in rupees and China in yuan challenges the dominance of the petrodollar, raising concerns over the U.S. dollar's strength. The limited U.S. response to this behavior underscores India's autonomy, hailing from its importance in U.S. regional strategy.

De-dollarization

China has been advocating for the renminbi's (RMB) internationalization, while India has taken small steps to broaden the reach of the rupee, reflecting their respective pursuits of economic autonomy. Initiatives include opening Special Rupee Vostro Accounts (SRVAs) and agreements with countries like UAE and Russia to conduct trade in rupees. Concerns over exchange rate stability have prevented full convertibility of the rupee in capital accounts, hindering trade with UAE and Russia. As exchange rate volatility can hurt the competitiveness of India's imports and exports, leading to disruptions in trade flows and economic stability, it underscores the current paradox of internationalizing rupee.

Revealed Preferences

India has moderate to strong autonomy in the economic sector and is expected to gain more autonomy in the future as it imposes import restrictions on China. In this sector, the greatest leverage India holds is its vast population and growing economy that offer both huge trade and manufacturing potential. The biggest vulnerability, however, lies in its geopolitical conflicts with China despite reliance on China for industrial imports. While grappling with a trade deficit with China, India has intensified efforts to bolster domestic production and diversify its partnerships. India's efforts to attract foreign investment demonstrate its interest in sustainable economic growth and development, while reducing dependence on China. India's flourishing trade ties with Russia underscore its ability to flex economic autonomy. Overall, India aligns itself closer with the U.S., although not without any friction.

Technology

India's strategic policy on technological development centers on transferring technology from trusted partners and developing its indigenous ecosystem under the "Make In India" initiative for economic development and prosperity. Consequently, collaboration with the U.S. has enhanced and ties with China stagnated. India has effectively shut Huawei out of its 5G network, tacitly showcasing that it agrees with related concerns over national security. It is eagerly partnering with American and Taiwanese semiconductor companies to set up manufacturing facilities and supply chains in the country. Still, India remains dependent on China for low-cost consumer technologies, such as mobile phones and laptops, and critical nodes in the industrial supply chains continue to traverse through the mainland. For its part, the U.S. wants closer strategic ties with India, and technological collaboration and joint research and development are significant parts of the relationship. On the other hand, China desires access to the growing Indian market and aims to maintain the vast trade surplus in its favor, giving Beijing both economic benefits and leverage over New Delhi.

Technology Alignment Metrics

Securitized Technologies

Strategic competition with China has made India conscious of its technological dependence on Beijing, which it now views as a vulnerability in light of great power and India-China competition. This has resulted in Huawei and ZTE, who were a significant part of the country's 4G network, being left out of the "trusted sources" list eligible to supply 5G equipment for the new-generation telecommunications standard. New Delhi has also banned Chinese mobile applications such as TikTok and WeChat, citing threat to users' data privacy and national security. Since Instagram and WhatsApp have solidified their market share in India. The U.S.-based Meta Platforms owns both.

Closer U.S.-India cooperation on advanced technologies is being led by strategic convergence between the two nations. India is keen to attract investment and transfer of technology from technological entities in the U.S. This is most evident in the fields of semiconductor and military systems. U.S.-based Micron Technology has recently invested in India to the tune of \$825 million to set up a semiconductor assembly and test facility in the country. It aims to build an ecosystem for research and collaboration in the fields of semiconductor and memory design, data analytics, AI, 5G, and edge technologies. New Delhi will also begin the indigenous co-production of General Electric's F414 engines to power its new fighter aircraft. This development was made possible after the U.S.-India Major Defense Partnership achieved a new milestone when Washington agreed to share this advanced technology with India.

Non-securitized Technologies

India's divergence from China as a technology partner is less pronounced when it comes to non-securitized technologies. Chinese mobile phone manufacturers like Xiaomi, Oppo, Vivo, Realme, and OnePlus hold a combined 67% market share in India's consumer mobile phone market. Despite this, they face increasing scrutiny from Indian regulators and tax authorities. Xiaomi had \$725 million seized from its local bank accounts in 2022 due to illegal remittances, while Vivo is accused of money laundering and document forgery. Realme is under fire for allegedly collecting users' data, and several companies, including Xiaomi, Oppo, Vivo, and Lenovo, are investigated for tax evasion. BYD, a Chinese electric vehicle manufacturer, faced scrutiny before entering India's market, illustrating New Delhi's cautious approach to foreign investment from China, even when it boosts the domestic economy and creates jobs.

Meanwhile, U.S. entities such as Apple and Tesla, among others, have either invested in, or are planning to do so, in the Indian market. Their focus is on domestic manufacturing – to both cater to the local population and export – and integrate and diversify supply chains.

Space

There is a clear alignment between India and the United States on space cooperation. Space collaboration between the U.S. National Aeronautics and Space Administration (NASA) and the Indian Space Research Organization (ISRO) is also gaining momentum. The two organizations are jointly working on a Synthetic Aperture Radar satellite, named NISAR (NASA ISRO Synthetic Aperture Radar). Once launched, this Earth-observing mission will scan nearly all the planet's land and ice surfaces twice every 12 days to collect scientific data and measure Earth's changing ecosystems, dynamic surfaces, and ice masses. It will provide information about biomass, natural hazards, sea level rise, and groundwater, and will support a host of other applications. Meanwhile, India's space cooperation with China National Space Administration (CNSA) has been nominal and fostered under the BRICS partnership. For example, in August 2021, space agencies of the member countries signed an agreement for cooperation in remote sensing satellite data sharing.

Revealed Preferences

Based on the current trends, India is pivoting toward the U.S. in the technology sector. The deepening partnership is driven by the increase in U.S.'s willingness to enhance its technological collaboration and engagement with India, in line with Washington's desire to develop closer strategic partnership with New Delhi. This fact showcases India's leverage vis-a-vis the U.S. to get access to advanced technologies in line with its economic and security interests.

At the same time, India has allowed Chinese technology companies to operate in non-critical sectors – like low-cost consumer equipment and the competitive auto industry – albeit under scrutiny and a strict regulatory framework. This fact highlights two characteristics in India-China ties: first, India would benefit from Chinese investment and access to low-cost technological products and, second, it remains vulnerable to economic coercion by China due to the reliance on Chinese supply chains and the significant trade deficit in Beijing's favor.

Global Challenges

India's strategic policy in the global challenges sector is driven by its ambition to be a regional player. It has managed to do so vis-a-vis (i) multilateral initiatives to strengthen its regional position, (ii) the pick-and-choose approach of cooperation based on its national interests, and (iii) taking advantage of great powers' interests to leverage its own. Washington stresses on strengthening India's emergence as a leading regional leader, implicitly to counter Beijing's clout in the region. It has been able to do so by supporting India's multilateral initiatives and deepening bilateral cooperation in many aspects of human endeavors, including health and energy cooperation. So far, Washington has been able to take advantage of its edges to deepen its relations with New Delhi. China, on the other hand, has leveraged the common position as developing countries to maintain its cordial relations with India in this sector. India continues to be a valuable partner in terms of climate change negotiations. However, as competitors in the region, China and India have little in common.

Global Challenges Alignment Metrics

Multilateral Initiatives

India has received strong support from the U.S. for its leadership in regional initiatives, while New Delhi and Beijing have been in direct competition for regional leadership status. New Delhi established new multilateral organizations such as the International Solar Alliance (ISA) and the Coalition for Disaster Resilience Infrastructure (CDRI). Washington supported New Delhi's efforts with the U.S. joining ISA and CDRI during the Biden administration. In 2022, the U.S. was the co-chair of the Governing Council of CDRI. Interestingly, China is absent from both organizations. Explicitly for ISA, it was due to the tense relations between Beijing and New Delhi, even if the latter said it would welcome the former's membership. Thus, India has strived to be a regional player despite not having the initial support of Washington and seemed to be ambivalent about China's support and/or participation.

Climate Change

India has enough strategic independence to choose what climate issues it wants to cooperate on. India and China align in their framing of climate policy as an economic growth issue, differing from the US's emphasis on security. India-China climate cooperation is facilitated particularly within the BASIC Group formed in 2009. This group advocates for developed states to lead emissions reduction while allowing developing nations time for development parity. However, under securitized issues like water security, India competes with China, where tensions arise over shared transboundary rivers like the Yarlung Zangbo/Brahmaputra. China's reluctance to establish effective bilateral/regional water governance bodies complicates cooperation despite potential opportunities. On the other hand, Washington and New Delhi continue to cooperate bilaterally on clean energy, climate finance mobilization and other sectors that the latter sees the former has advantages in.

Health

India's mistrust towards China prevents it from enhancing cooperation on health. Even though both China and India are part of BRICS and have cooperated with other partners in addressing common health challenges, their current competition prevents them from building a bilateral health partnership. On the other hand, India has strongly aligned with the U.S. on health and vaccine diplomacy, especially in the COVID-19 pandemic. Ready to advance its regional leadership and capitalize on Washington's antagonistic rhetoric towards Beijing, India cooperated heavily with the U.S. in emergency response efforts across the Indo-Pacific region, including vaccine development and sharing of best practices. This represents a continuation of U.S.-India health cooperation since the 1960s.

Human Rights

India has shown some alignment with China on human rights matters. Notably, it has abstained from voting on UN resolutions concerning Beijing's human rights violations in Xinjiang, despite expressing concerns about these violations. This stance may be partially influenced by India's sensitivity to such issues, given allegations of human rights violations in its own territory, particularly in Kashmir. Despite underlying tensions in their relationship, both countries maintain a relatively cordial stance on this front.

Conversely, Washington has voiced apprehensions regarding human rights abuses in India, with discussions within Congress exploring potential repercussions, such as linking bilateral relations with improvements in human rights. However, reports suggest that U.S. and Indian officials have not consistently addressed this issue directly in their diplomatic interactions.

Revealed Preferences

Based on the selected metrics, India has shown strong alignment with the U.S. in the global challenges sector despite some signs of cooperation with China. For instance, its cooperation efforts are superficial and only seem to be growing in group settings (such as BASIC and BRICS). India's preference for U.S. partnership on transboundary challenges serves both as India's biggest source of leverage and vulnerability in this sector. On the one hand, the U.S. has supported its leadership and regional initiatives. On the other, India's maneuvering room to strengthen cooperation with China in this sector becomes narrower with increased U.S. involvement. Overall, India's regional leadership grants it strategic autonomy to cooperate with both superpowers on specific aspects of health and climate when necessary.

Overall Observations

India has strategically pivoted towards the United States amidst the U.S.-China strategic competition, driven by concerns over the India-China border dispute and China's expansionist actions. However, there remain areas where India is not aligned with the U.S. While both countries share interests in countering Chinese assertiveness in the Indo-Pacific, India's aversion to formal military alliances means it cautiously approaches security cooperation. India's efforts to reduce its trade deficit with China – a key economic vulnerability – have led to a push for domestic production and diversification of partnerships. On technology, India prioritizes its relationship with the U.S. for economic growth, job creation, and access to advanced technologies while allowing limited Chinese involvement in non-critical sectors (again limiting the vulnerabilities of doing business with China). While the trends in the global challenges sector demonstrate a preference for engagement with the U.S., there has been some multilateral cooperation between India and China on climate change. India's alignment with the U.S. is driven by its competition with China and strategic autonomy in the region, even as it maintains the flexibility to assert its position independently. This forward-looking analysis will continue in the implications section of this report.

Saudi Arabia

SECTORS | OVERALL OBSERVATIONS



Security

Saudi Arabia's top security priorities include shielding itself from Iranian proxies, preparing for potential conflicts, and intervening in regional conflicts. It seeks security guarantees, especially from the great powers, to provide arms, military training, and diplomatic mediation. The U.S. is interested in partnering with Saudi Arabia to counter Iranian influence, ensure Israel's security, mitigate regional conflict spillover from Yemen, and maintain Middle East stability for oil access (though this priority has decreased throughout the shale boom). These interests are crucial for supporting allies and achieving geopolitical objectives, notably in energy security. Historically, the U.S.-Saudi relationship was characterized as an energy-for-security partnership. However, the rise of American shale oil production since 2008 has weakened the energy leg of the partnership, and China's oil demand grew to replace it. China's interests in Saudi Arabia are more narrowly focused on energy security and partnerships to ensure freedom of navigation through critical maritime corridors in the Middle East, which are essential for sustaining China's economic growth. While Beijing has concerns about the threats to oil production and shipping posed by regional instability, it has little appetite for intervention.

Security Alignment Metrics

Post-Cold War Conflicts

Saudi Arabia has partnered with the U.S. selectively on post-Cold War interventions, aligning based on internal cost-benefit assessments and opting out when interests conflict with the U.S. The 1991 Gulf War was significant, showcasing Saudi Arabia's alignment with U.S.-led forces to repel the Iraqi invasion of Kuwait, solidifying military cooperation and positioning Saudi Arabia as a key regional player for stability. However, Saudi Arabia did not support the U.S.-led invasion of Iraq in 2003 following the 9/11 attacks. The Yemen War reflects Saudi Arabia's assertiveness driven by geopolitical interests and regional security concerns. Saudi Arabia intervened at the invitation of the internationally recognized Yemeni authority in 2015, aligning with UN Security Council resolutions. Additionally, Saudi Arabia's collaboration with the U.S. against ISIS highlights shared commitments to combating terrorism and regional stabilization, emphasizing mutual strategic interests. In contrast, China does not have a history of direct intervention in post-Cold War conflicts in the Middle East. Though Beijing has an economically driven interest in regional stability and has concerns about Islamic extremist terrorism, its counterterrorism approach has focused domestically on Xinjiang and not on cooperative global campaigns.

Military Alliances & Partnerships

Saudi Arabia has no formal treaty alliances with either great power. However, Saudi Arabia and the U.S. have had a close and continuing partnership through the Defense Security Cooperation Agency, which has facilitated significant training and arms sales since 2009.

Strategic Diplomacy

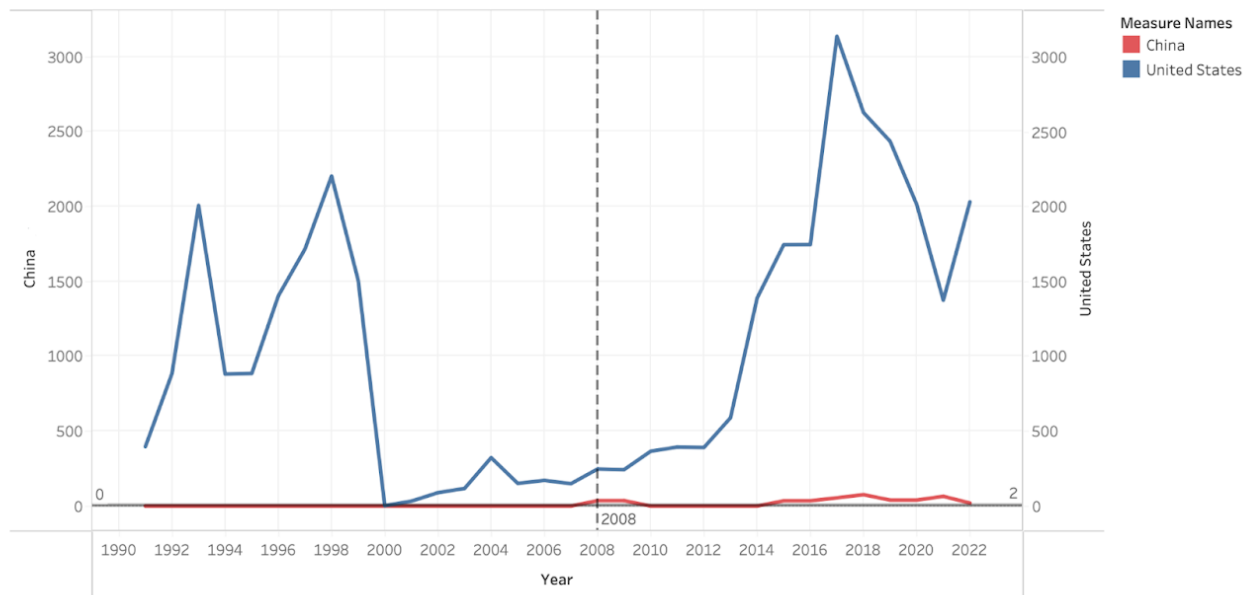
Saudi Arabia's diplomatic endeavors demonstrate its readiness to play both sides to secure its interests. Saudi Arabia's voting behavior in the United Nations General Assembly captures this balancing act. Saudi Arabia voted in favor of the UN GA resolution A/RES/ES-11/1, condemning the Russian invasion of Ukraine in alignment with the United States. Conversely, Saudi Arabia voted in favor of UN GA resolution A/ES-10/L.27 condemning the Israeli behavior in Palestine following the October 7th terrorist attacks, aligning with China and diverging from the U.S. position.

It is also worth mentioning the high-profile negotiations that are mediated on behalf of Saudi Arabia by the great powers. The Saudi Arabia-Iran normalization deal brokered by China demonstrated Saudi Arabia’s adeptness in leveraging diplomacy to enhance regional stability and recalibrate tense relations. Similarly, the ongoing Saudi Arabia-Israel normalization deal being brokered by the U.S. underscores how the Kingdom is able to extract diplomatic concessions from both great powers under the competition framework. In this manner, Saudi Arabia balances diplomatically between the U.S. and China and benefits from their competition.

Arms Sales

While Saudi Arabia has demonstrated greater willingness to play both sides diplomatically, it remains heavily dependent on the United States as its primary arms provider. Longitudinal data from the Stockholm International Peace Research Institute (SIPRI) illustrates that the United States is the single largest arms exporter to Saudi Arabia, both historically and currently. As illustrated in Figure 3, the volume of U.S. arms sales has vastly overshadowed that of the PRC since 2008, even throughout periods of strain like the one from 2016 to 2020. The value of PRC arms exports to Saudi Arabia has increased marginally since the outset of the competition, while the total remains negligible compared to the U.S.

Figure 3. Comparative US-China arms sales to Saudi Arabia, 1991-2022



The trends of China and United States arms sales to Saudi Arabia from 1991-2022. Figures are measured in millions of SIPRI trend-indicator values (TIVs). The SIPRI TIV is a measure of the volume of international transfers of major arms. A '0' indicates that the volume of deliveries is between 0 and 0.5 million SIPRI TIV. Data Source: SIPRI

Saudi Arabia’s arms supply from the U.S. remains vulnerable to restrictions. Trends show that U.S. arms sales increase during periods of interest alignment and decrease during periods of divergence. Peaks occurred around the Gulf War and the outset of the Yemeni Civil War, reflecting joint interests. Sales dropped to near-zero levels around 9/11 and the Saudi condemnation of the Iraq War in 2003, and cooled again following American concerns over Saudi military abuses in Yemen in late 2016 and the murder of Jammal Khashoggi in 2018. Despite these fluctuations, however, Saudi Arabia remains a consistent customer for American weapons.

It is interesting to note that the uptick in Chinese arms sales coincided with the downturn in U.S. sales around 2016, suggesting Saudi Arabia turned to China as an alternate supplier until American policy became more accommodating. In this manner, the great power competition has increased Saudi Arabia's autonomy to disregard the U.S. human rights agenda and act with greater impunity.

Military Exercises

Saudi Arabia has participated in a host of recurring bilateral and multilateral military exercises with the United States nearly every year since 1999. These exercises have covered a full scope of domains, including cyber, airpower, continental warfare, long-range bombing, counterterrorism, protection of civilians, anti-piracy, amphibious deployments, and sustainment operations. The largest multilateral exercises have included around 20 nations from the Middle East and the West.

In comparison, Saudi Arabia has a limited history of military exercises with China. This report found no record of multilateral exercises involving Saudi and Chinese forces without U.S. participation, indicating China's inability to offer Saudi Arabia a military partner network comparable to the United States. On the bilateral front, Saudi Arabia and China have conducted a joint naval exercise called BLUE SWORD, focusing on overseas counterterrorism and anti-piracy. The inaugural exercise was held in Saudi Arabia in 2019 amid strained U.S.-Saudi relations over the Khashoggi murder, while the second iteration occurred in China in 2023, following China's mediation of Iran-Saudi relations normalization. These instances suggest Saudi Arabia's willingness to explore bilateral relations with China, particularly when U.S. and Saudi interests diverge.

Military Bases

China does not have military bases in Saudi Arabia, while the U.S. troop presence has decreased in the 21st century. At the height of Operation Iraqi Freedom in the 1990s, Saudi Arabia was estimated to host over 5,000 coalition troops at a time. By 2022, open source estimates suggest that Saudi Arabia was hosting around 2,700 American troops at a given time, primarily based out of the Prince Sultan Air Base southeast of Riyadh.

Revealed Preferences

The United States remains the primary security partner for Saudi Arabia, as demonstrated in the comparative volumes of arms sales, the heavier troop presence, and the frequency and scope of military exercises. Even so, Saudi Arabia has demonstrated an interest in exploring the offerings of both great powers. Notably, this report observes a trend where Saudi Arabia turns to China for arms and diplomatic support when the U.S. is unable or unwilling to deliver. This autonomy exerts pressure on the United States to compromise its humanitarian agenda and compete for more impressive diplomatic breakthroughs.

Saudi Arabia's strategic location is a source of both leverage and vulnerability, as it is situated in a volatile region amidst key powers, natural resources, and major shipping routes of interest to the great powers. The additional vulnerability stems from its limited indigenous capacity to produce complex weapon systems and its dependence on the U.S. for arms and training. Yet, Saudi Arabia's significant oil wealth and location grant it autonomy to pursue security policies that align with its national interests despite its vulnerabilities.

Economy

Saudi Arabia's economic interests center on growth, diversification, and resilience. The Kingdom's predominantly oil-based economy is vulnerable to market volatility and fluctuations. Diversification is crucial to long-term economic growth, domestic stability, and autonomy in foreign policy. Recognizing these needs, the Kingdom launched its "Vision 2030" plan to diversify the economy, culture, and society. Under Vision 2030, Saudi Arabia aims to grow its capacity in non-oil and gas sectors such as renewable energy, advanced technology, industrial equipment, and public infrastructure. Saudi Arabia has prioritized foreign partnerships to help achieve its Vision 2030 goals. In the economic sector, the U.S. is interested in Saudi Arabia's oil exports, its influence over global energy prices, its regional leadership in OPEC, and its overseas investment. China regards Saudi Arabia as a strategic trade partner and is the largest consumer of Saudi oil. China anticipates Saudi Arabia's potential inclusion in BRICS, which could facilitate significant progress in RMB internationalization, particularly if promises to trade crude oil in RMB are fulfilled.

Economic Alignment Metrics

Trade

China is currently Saudi Arabia's largest trading partner for both exports and imports, with the U.S. being the second largest. The first time China surpassed the U.S. in its bilateral trade value with KSA was in 2011. Today, China is a larger trading partner with Saudi Arabia than the rest of the West combined. China is the world's largest buyer of crude oil, while oil and oil products account for 77% of China's total imports from Saudi Arabia. In turn, Saudi Arabia imports technological equipment, telephones, and light fixtures, diversifying from an oil-oriented economy in pursuit of greater economic autonomy. China consistently runs a trade deficit with Saudi Arabia despite a global trade surplus.

Investment & Foreign Direct Investment

The United States remains the largest investor in terms of FDI position in Saudi Arabia, far exceeding other countries, particularly in sectors such as oil and gas, defense, and infrastructure. There has also been a sharp surge in recent years, primarily in software and IT. China's FDI in Saudi Arabia has also surged in recent years, driven by its ambitious Belt and Road Initiative (BRI) and the investment opportunity presented by Saudi's Vision 2030. Chinese investments tend to prioritize automotive, metals, and semiconductors. In terms of Greenfield FDI, from 2008 to 2021, the trend was stable, yet from 2022 to 2023, the number and value of the projects skyrocketed. Estimates from Emirates NBD showed China pumped in \$16.8 billion in 2023, as opposed to \$1.5 billion in 2022. Although the influx of foreign capital is increasingly from China and India, apart from China, the second largest investor is the United States with \$2.7 billion, a 238 percent increase compared to last year. Saudi Arabia's efforts to reduce the reliance on oil and develop other sectors have been partially successful; the share of hydrocarbon revenue has fallen from 45% in 2012 to 40% today. Yet, Saudi Arabia needs to increase investment and knowledge transfer further. Despite the revamped business law to persuade investors to engage capital, the Kingdom has fallen short and remains vulnerable to fluctuations in the oil market.

Sanctions Alignment

Saudi Arabia has refused to join the sanctions against Russia – an act demonstrating its economic autonomy. Although Saudi Arabia voted in the UN resolutions to condemn the invasion, it has been unwilling to sacrifice its energy partnership with Moscow due to economic interests. The Ukraine crisis caused a spike in global oil prices, and Saudi Arabia was a direct beneficiary. Saudi Arabia leveraged its control over production and the price at the pump, thereby diverging from U.S. policy to pursue its own economic agenda. This case underscores the widening gap between U.S. and Saudi economic interests in the energy sector, contrasting with greater alignment between China and Saudi Arabia. Domestic shale oil production in the U.S. since 2008 has grown to meet its oil demand, disrupting the traditional energy-for-security exchange model between the U.S. and Saudi Arabia. Tensions over oil price setting have also escalated due to divergent domestic needs, with Saudi leaders sustaining high oil prices to finance Vision 2030 and American consumers struggling to pay the high gas prices owing to Russian sanctions. Meanwhile, China's emergence as the top Saudi oil market has facilitated the Kingdom's autonomy to subvert U.S. energy policies when interests do not align.

De-dollarization

Saudi Arabia maintains strong alignment with the U.S. dollar. Since 1986, Saudi Arabia has pegged its currency, the riyal, to the dollar at a fixed rate of 3.75 riyal to one dollar, primarily to facilitate oil trade. However, this fixed exchange rate limits Saudi Arabia's monetary autonomy and necessitates the purchase of U.S. Treasury Bonds and debt to bolster the dollar. The United States' ability to freeze assets in times of crisis creates another vulnerability for Saudi Arabia, underscoring its lack of control over financial assets invested abroad.

Saudi Arabia has explored options for de-dollarization to reduce these vulnerabilities. In January 2023, Saudi Arabia announced acceptance of currencies other than the U.S. dollar for oil contracts, challenging Petrodollar dominance and causing friction with Washington. Speculation also surrounds the potential sale of Saudi Arabia's U.S. dollar reserves, which could significantly weaken the U.S. dollar if collective action is orchestrated with China and India. Furthermore, the Public Investment Fund (PIF) reportedly obtained Qualified Foreign Institutional Investor (QFII) status in China, allowing it to invest directly in the Chinese stock market using renminbi. This opens the possibility for yuan reserves accumulated from oil purchases to be reinvested through PIF in China. Yet, the authors of this report remain skeptical about how meaningful these de-dollarization mechanisms will be in the medium-term future. At present, Saudi Arabia still has a serious interest in maintaining the strength of the U.S. dollar.

Revealed Preferences

Based on the examined metrics, Saudi Arabia has shown a moderate preference for economic alignment with China. This trend is most apparent in trade, as China has far surpassed the U.S. as Saudi Arabia's top import and export partner. Saudi Arabia's divergence from U.S. economic policy is further exemplified in its defiance of U.S.-led sanctions against Russia. Yet, Saudi Arabia simultaneously receives significant FDI inflows from the U.S. and heavily depends on the strength of the U.S. dollar. In this manner, Saudi Arabia can be understood as China-leaning yet multi-aligned within the economic sector.

The greatest economic leverage Saudi Arabia holds is its leadership role as a global swing producer in the OPECs, which renders it crucial for the energy security of the superpowers and grants it capability to set oil prices. Its lack of diversification creates a general economic vulnerability, as the economy is heavily impacted by the changes in the oil market thus in need of reducing oil-dependence, exposing it to the United States' or China's possible exploitation.

Technology

Saudi Arabia is interested in gaining access to advanced technologies from around the world to enhance its economic development and diversification of revenue away from energy-related income. Riyadh's technology policies are driven by Vision 2030, and technoscientific cooperation is being used to foster state-led industrialization and economic development. The U.S. has traditionally been Saudi Arabia's partner in science and technology research, but recent concerns have emerged regarding Riyadh's increasing ties with Beijing. These concerns relate to Saudi Arabia's disregard for avoiding securitized technologies, such as Huawei's 5G equipment, and the potential for U.S. technologies to be reverse-engineered, copied, or illegally exported to mainland China from the kingdom. For China, Saudi Arabia is an important regional partner and an important source for its significant energy needs. Collaboration on the kingdom's technological development goals has been a part of China's overall strategy to develop closer ties with Riyadh.

Technology Alignment Metrics

Securitized Technologies

Saudi technological collaboration with China has been most significant in artificial intelligence, 5G, and drones. Huawei Technologies has been integral to building Saudi Arabia's 5G network. Huawei and Xiaomi have established research centers in the kingdom, and Chinese-funded venture capital firms are investing in local chip-makers. Huawei has partnered with the Saudi Telecom Group on 5G projects and pledged to "strengthen the cooperation" in technology research.

The kingdom's premier academic institution, King Abdullah University of Science and Technology (KAUST), hosts many Chinese students and teachers and collaborates with research organizations on the mainland, including universities in Shenzhen, to share research capabilities and to exchange talent. Professor Jinchao Xu, an American-Chinese mathematician at KAUST, has launched AceGPT, an Arabic-focused large language model, in collaboration with the Chinese University of Hong Kong, Shenzhen and the Shenzhen Research Institute of Big Data. Further, the institution's president, Tony Chan, has even co-authored an article in *Foreign Policy* titled "America can't stop China's rise. And it should stop trying." Meanwhile, Washington has focused on restricting China's access to advanced technologies and expertise through entities in third countries, like Saudi Arabia. To this end, it has reportedly restricted the export of advanced semiconductors necessary to power artificial intelligence models to unnamed "Middle Eastern countries." These countries may include Saudi Arabia and the United Arab Emirates. The following example could explain U.S. concerns behind this move: has ordered 3,000 units of Nvidia's advanced H100 chips. Yet, KAUST hosts a significant number of Chinese students and teachers and collaborates with research organizations in the mainland. In such a situation, Washington would want to ensure that the exported chips are not vulnerable to espionage, reverse engineering, or transfer to Chinese entities. The presence of Huawei and Xiaomi research centers in the kingdom, as well as Chinese-funded venture capital firms investing in local chip-makers, only adds to the worry.

In a similar vein, the Biden administration forced a Saudi Aramco venture capital fund, Prosperity – which has invested in a number of Chinese startups – to divest its shares in an U.S.-based AI chip startup, Rain AI, which designs chips inspired by how the brain works. This action was taken after a review by The Committee of Foreign Investment in the United States (CFIUS), on U.S. national security grounds. This practice of targeted divestment on national security grounds could be expanded as more areas of technoscientific cooperation become securitized.

Non-securitized Technologies

Sino-Saudi collaboration on non-securitized technologies has been similarly robust. Between 2007 and 2021, twenty joint technoscientific projects took place between Saudi Arabia and China, including in: electronics, smart city (digital governance), internet of things, manufacturing tech (including environmentally and socially responsible industrialization and intersections with artificial intelligence), drones, research and development on satellite system, new infrastructure (telecommunications and renewable energy), 5G hardware and software, cloud services and computing, hardware and software for high-speed railways, new materials and material science in manufacturing, e-commerce applications and software, renewable energy (solar and wind), photovoltaic manufacturing, health technology (genetics and biopharmaceuticals), artificial intelligence applications, electric vehicles (batteries and supply chains), nanotechnology, e-games and new entertainment, and data services.

In December 2022, Huawei signed a memorandum on cloud computing and building high-tech complexes across the country. In September 2023, it opened a cloud data center in Riyadh to enhance its online service offerings in the Middle East and North Africa. Interestingly, Saudi Arabia has mandated that leading Chinese technology companies enter into joint ventures with local partners and transfer technology to secure deals in the kingdom. This is reminiscent of conditions China has put on Western companies who wanted access to its domestic market. Accordingly, when Alibaba Cloud entered the Saudi market in 2022, it formed a joint venture with the Saudi Telecom Group. Saudi Arabia's focus on localization has also been evident. For example, Chinese autonomous driving group, Pony.ai, was granted a \$100mn investment by the Neom Investment Fund, on the condition that the company would establish a regional research and development center, and its manufacturing headquarters in the country. Yet, Riyadh has been courting investment and technologies from the U.S. as well, showcasing its intent to economically and strategically benefit from technological cooperation with both Washington and Beijing.

Space

Saudi Arabia and China are collaborating on research and development on satellite systems. Riyadh is also said to be in active negotiations with Chinese space contractors for a comprehensive deal covering technology transfer for satellite software and space defense technologies. Meanwhile, in July 2022, the Kingdom signed the U.S.-led Artemis Accords, affirming its commitment to sustainable space exploration guided by a common set of principles that promote the beneficial use of space for all of humanity.

Revealed Preferences

Saudi Arabia's behavior reveals a trend of moderate alignment with China in the technology sector. To fulfill its economic and development goals, the Kingdom has increasingly been partnering with entities in China, trading market access, deals, and investment for inbound transfer of technology and localization. Saudi Arabia's collaboration with China on drones, missiles, 5G, space, and domestic surveillance technologies showcases its willingness to work with Beijing in areas where Washington is unwilling or unable to collaborate. At the same time, these moves have heightened concerns in the United States and opened the doors to Washington introducing new export controls, secondary sanctions, and targeted divestment measures aimed at cutting the flow of advanced U.S. technologies and know-how to Beijing through Riyadh. Nonetheless, Saudi Arabia is keen to continue its partnership with the U.S. on advanced technologies and scientific research and development, even while keeping its options open in terms of attracting transfer of technology and local manufacturing from China. This trend would likely continue as long as the strategic environment – in its region and between the U.S. and China – does not significantly deteriorate.

Global Challenges

Saudi Arabia's strategic policy in global challenges aims to establish itself as a regional player. This is achieved through (i) participation in multilateral initiatives led by either great powers or Saudi Arabia itself; (ii) prioritizing its national interests over those of great powers; and (iii) extracting concessions from great powers. This strategy necessitates flexible alignment with both Beijing and Washington. The subsequent paragraphs will elaborate on key areas exemplifying these strategies: multilateral initiatives, climate change, health, and human rights. The U.S. wants to use KSA's position as a regional partner to promote green transitions and mitigate health challenges in the Middle East. It supports KSA's ambition to be a regional leader, at least in areas in which it also has overlapping interests, such as energy security. Washington has relaxed its human rights agenda in Saudi Arabia, limiting consequential punishments against KSA's violations. China wants to increase its strategic importance in KSA's foreign policy, concurrent to the track it has been pursuing since 2008, after the upgrade to strategic relationship between the two countries. KSA's strategic geography in BRI as a key channel for Sino-African economic and trade cooperation and its oil resources have great strategic importance to China.

Global Challenges Alignment Metrics

Multilateral Initiatives

Saudi Arabia engages in various regional and global initiatives supported by the U.S. and China, thus maintaining equidistance in alignment. Saudi Arabia coordinates its national initiatives with recognized global efforts: Vision 2030 integrates United Nations' Sustainable Development Goals (SDGs) and is linked with China's BRI and the U.S.-led Partnership for Global Infrastructure and Investment (PGII). Both PGII and BRI aim to accelerate Saudi Arabia's energy transition and combat climate change, with PGII excluding Beijing and BRI excluding Washington. The fact that both Beijing and Washington pose no objection to Saudi Arabia's practice means that Saudi Arabia holds autonomy to multi-align itself between exclusive multilateral initiatives, simultaneously strengthening and deepening its cooperation with both great powers.

Saudi Arabia's Saudi Green Initiative and the Middle East Green Initiative engage both Washington and Beijing as strong partners. These initiatives demonstrate Saudi Arabia's strategic use of climate change to bolster its regional influence. Saudi Arabia has matched its own interests in tackling climate change with those of great powers to make its regional initiatives more appealing as a possible forum for cooperation. For instance, following John Kerry's visit in 2021, both countries emphasized energy diversification. Similarly, China-Saudi Arabia relations prioritize clean energy sources. In this manner, Saudi Arabia accommodates great power interests in exchange for support on its regional multilateral initiatives.

Climate Change

Saudi Arabia maintains a multi-aligned stance on climate issues, seeking issue-based support from whichever great power can provide better diplomatic and technical solutions to meet the Kingdom's needs. For instance, during COP negotiations, Saudi Arabia and China jointly sought to prevent unfavorable language towards fossil fuels. This behavior did not result in negative consequences in Washington, but instead prompted U.S. officials to increase American energy diversification initiatives in conjunction with Riyadh. Saudi Arabia seeks to diversify its energy resources by enhancing cooperation with both Washington and Beijing, particularly in clean, low-emissions, and renewable energy like clean hydrogen.

Health

Saudi Arabia has strong relations with both China and the U.S. in the health sub-sector. China and Saudi Arabia collaborated with one another in health sectors on both bilateral and multilateral platforms. Health is a recent addition to the China–Saudi Arabia portfolio of cooperation, especially after the introduction of China’s “health silk road.” The expansion showcases Saudi Arabia’s aim to be China’s strategic partner and investment destination.

On the other hand, the U.S. and Saudi Arabia have had strong collaboration in health for over two decades. Both countries’ collaboration happens both bilaterally through government agencies and multilaterally through UN agencies such as the World Health Organizations. Some of their areas of collaboration include: managing emerging diseases, and capacity building in laboratory systems.

Human Rights

By using its leverages, Saudi Arabia has effectively made itself an “exception” in Washington’s foreign policies regarding human rights protection. This in turn shields Saudi Arabia from potential concrete punishments beyond Washington’s stern statements while giving the Kingdom more space to strengthen its relationship with both great powers. In the sphere of U.S.-Saudi relations, historical alliances have often outweighed concerns over human rights abuses. This failure to address these issues undermines U.S. leverage on human rights matters. The continuation of arms sales without tangible results in terms of human rights improvements raises questions about the ethical and strategic implications of such policies. At the same time, as Saudi Arabia - China economic ties have expanded, there are concerns about accountability and transparency regarding both countries’ active protection for each other against international criticism. China’s policy of non-interference provides Saudi Arabia with a shield against criticism of its human rights violations. In exchange, Saudi Arabia gives China support in defending the latter’s human rights records, particularly concerning issues like Beijing’s treatment of Uyghurs in Xinjiang. In conclusion, Saudi Arabia’s relations with both Washington and Beijing have led to the active avoidance and absence of human rights violations, allowing Saudi Arabia to focus on its domestic priorities without much external pressure. At the same time, it also shows a mild pivot towards Beijing amidst complex global relations.

Revealed Preferences

Analysis of the selected metrics reveals a trend of flexible Saudi alignment with both great powers based on an issue-by-issue basis. Saudi Arabia uses its leverages from other sectors to gain concessions such as green technology assistance from both powers and limited human rights retaliation by the U.S. Even if there are mild pivots in certain areas, this report argues that Saudi Arabia has managed to keep an equidistance between both Beijing and Washington in this sector, given that it has yet to receive concrete and lasting punishments from either of the great powers.

Regarding its leverage in the global common challenges sector, Saudi Arabia has created an intricate safety-net of partnerships that reduce its vulnerability to punishments for divergence on any one issue (e.g. fossil fuels production). Despite this layer of protection, Saudi Arabia remains vulnerable to U.S. values-based foreign policy decisions that condition assistance on Saudi’s adherence to human rights norms. The more intertwined the punishment is with Saudi Arabia’s core interests, the more it will lose for infractions. Currently, with its ability to flexibly align, Saudi Arabia has strong autonomy in this sector.

Overall Observations

Saudi Arabia has shown a trend of moderate alignment with the United States between 2008-2023 based on the variables considered in this report. The Kingdom maintains strong alignment with the U.S. in the security sector. However, Riyadh has shown a gradual pivot towards Beijing in the economic and technology sectors. Saudi Arabia remains equidistant when it comes to common global challenges. Since 2008, China has emerged as an alternative partner to help Saudi Arabia grow and diversify its economy, including through technological development. This trend is also dominant in the global challenge sector. With its recent membership in BRICS and as a leading voice of developing countries, Saudi Arabia has shown to be closer to China than the U.S.. Specifically, regarding human rights, there is a clear alignment between the Kingdom and Beijing. By solidifying its alignment with China as a developing country, Saudi Arabia can strengthen its goal of being a regional actor, holding enough clout to sway the region. On the other hand, to reach this ambition, the kingdom also requires the support of Washington, which is still recognized as a global leader. Therefore, its strategy of embedding Vision 2030 with global and China-spearheaded development initiatives and being able to fold the two great powers into its regional initiatives showcase Saudi Arabia's clear demonstration of its strategic consistency and independence. This also shows that Saudi Arabia can maneuver comfortably between Washington and Beijing as it can utilize its other partnerships with these two great powers that are aligned with its interests. This trend is believed to continue in the next 5-7 years if there is no "tail-risk" event that can accelerate the decline.

Brazil

SECTORS | OVERALL OBSERVATIONS



Security

In the security sector, Brazil's interests are centered around regional stability, autonomy in defense capabilities, and technological advancement. Its comparative advantages lie in its geographic position, vast natural resources, and a significant industrial base that supports its military development. Brazil's leverage comes from its role as a major regional power in South America and its active diplomacy, offering potential for security cooperation. However, vulnerabilities include challenges in border control, internal security, inability to back its ambitions, and limited hard power projection. The United States and China view Brazil as crucial for their geopolitical interests in South America, with the U.S. aiming for security partnerships and China focusing on military technology exchanges and investment in defense sectors.

Security Alignment Metrics

Post-Cold War Conflicts

Brazil has not directly participated in military engagements in the post-Cold War period but has contributed to United Nations peacekeeping missions. It made a notable contribution to the MINUSTAH Peacekeeping mission in Haiti, where Brazilian forces played a leading role from 2004 to 2017. This involvement shows Brazil's commitment to international peace and stability, specifically in the Americas.

Military Alliances and Partnerships

While Brazil does not have a formal military alliance with either the U.S. or China, it was designated a Major Non-NATO Ally (MNNA) by the United States in 2019. This status has offered Brasilia privileged access to military cooperation, enhancing its technological capabilities and efforts to address regional security concerns. This has been achieved through joint military exchanges, exercises, training programs, and the loan of equipment for cooperative research endeavors. Despite historical political dynamics and disagreements limiting U.S.-Brazil defense cooperation, both sides have made efforts to overcome these challenges, resulting in enhanced cooperation in defense, intelligence sharing, and technological progress between the U.S. and Brazil.

Conversely, Brazil has aligned with China in challenging the liberal international order and striving for independence from traditional Western hegemony. This collaboration is underscored by their participation in multilateral initiatives, providing a forum for these rising powers to advocate for alternatives to the current global order and demonstrate their shared desire to establish a multipolar world.

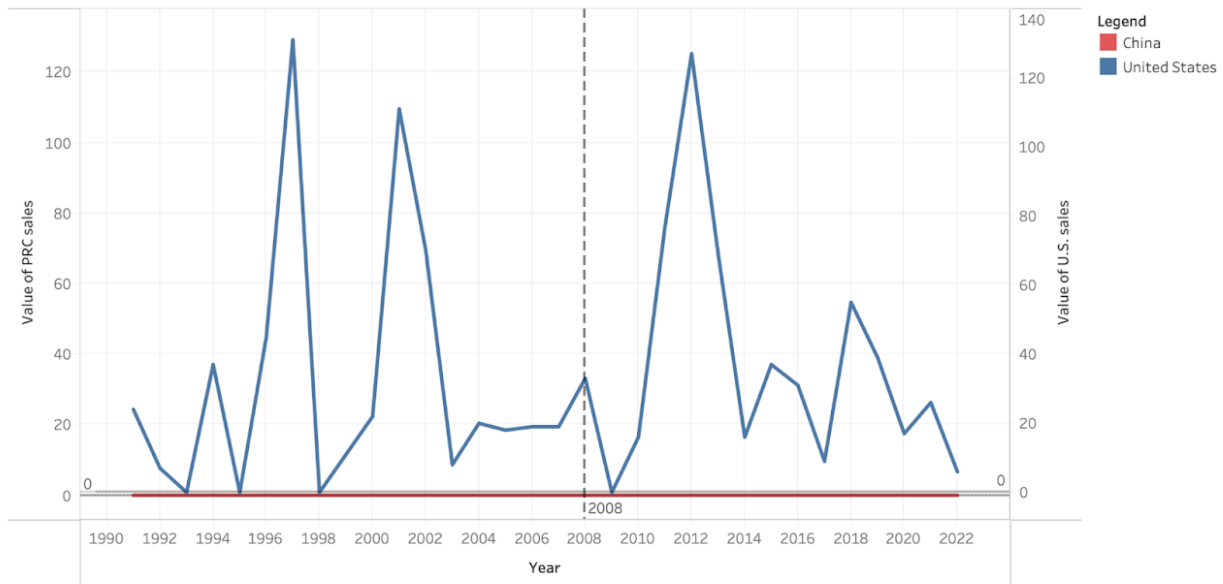
Strategic Diplomacy

Brazil's diplomatic efforts reflect a cautious balance between aligning with Western principles and values, particularly those of the U.S., and engaging with China to assert its autonomy and bolster its global stature. This approach is reflected in Brazil's voting on significant UN resolutions. In 2011, Brazil abstained from voting on United Nations Security Council Resolution 1973, which authorized military intervention in Libya, echoing China's stance and citing concerns over the use of force and escalation of violence. Similarly, in 2023, Brazil aligned with China by voting in favor of A/ES-10/L.27 concerning the conflict in Gaza. Conversely, Brazil sided with the United States by voting in favor of UN General Assembly Resolution ES-11/1 on the war in Ukraine in 2022.

Arms Sales

Brazil’s arms imports from the U.S. have fluctuated significantly and trended lower in recent years (see Figure 4). While the value of U.S. arms sales to Brasilia is relatively modest, the overall total still surpasses that of China, which has not engaged in any arms sales to Brazil.

Figure 4. Comparative US-China arms sales to Brazil, 1991-2022



The trends of China and United States arms sales to Brazil from 1991-2022. Figures are measured in millions of SIPRI trend-indicator values (TIVs). The SIPRI TIV is a measure of the volume of international transfers of major arms. A '0' indicates that the volume of deliveries is between 0 and 0.5 million SIPRI TIV.
Data Source: SIPRI

Military Exercises

Brazil and the U.S. have a long-standing history of participating in multilateral joint military exercises, notably UNITAS since 1960. Brazil demonstrated its leadership role in UNITAS by hosting the exercise in 2022. The two countries have also jointly participated in numerous other multilateral exercises with nations from Latin America, North America, Europe, and Africa. Most recently, Brasilia and Washington came together in a combined training exercise, Southern Vanguard, inaugurated in 2021 to increase interoperability and camaraderie between their respective armies. Conversely, Brazil has refrained from undertaking military exercises with China, likely due to concerns over potential strains on its bilateral relationship with the United States amid U.S.-China strategic competition.

Military Bases

Neither the U.S. nor China have military bases in Brazil. Previously, the United States had a naval support detachment in Sao Paulo that operated from 2008 until 2017, when the Brazilian government requested its closure. In 2019, then-president Bolsonaro vaguely suggested the potential opening of an American base in Brazil in the future. However, this proposal was retracted following criticism from the military. This incident highlights a divergence of interests among factions in Brazilian society, which could potentially affect the continuity of security policies in the future.

Revealed Preferences

The nation leverages its MNNA status with the U.S. for training and technological advancement, while concurrently upholding a diplomatic partnership with China to reinforce its strategic autonomy and influence. Notably, Brazil's hemispheric ties, exercise schedule, MNNA status, and military exchanges collectively indicate a moderate alignment with the United States as a security partner. However, Brazil's overarching autonomy in shaping its security policy is curtailed by its regional ties to the U.S.

Economy

Brazil's economic objectives are molded by its overarching strategy to remain the dominant economic force in Latin America while fostering regional economic cohesion. To realize this ambition, Brazil is strengthening its trade connections with China and attracting foreign investments in energy, infrastructure, and technology from both superpowers. The U.S. views Brazil as a pivotal regional leader in Latin America and wants to capitalize on its abundant resources and status as the continent's largest market. Conversely, China sees Brazil as a crucial trade partner that bolsters its food and energy security, as well as a significant player within the BRICS multilateral, potentially facilitating the internationalization of the Renminbi and reducing reliance on the U.S. dollar.

Economic Alignment Metrics

Trade

Brazil-U.S. trade ties are led by the Agreement on Trade and Economic Cooperation, established in 2011 to enhance collaboration on trade and investment, alongside the Protocol on Trade Rules and Transparency, signed in 2020, during the policy alignment between the Bolsonaro and Trump administrations. However, bilateral trade cooperation has cooled under Lula's regime, raising concerns about the resilience and continuity of Brazil's alignment with the United States.

Conversely, China stands as Brazil's largest trading partner. In 2023, Chinese exports to Brazil surpassed American exports by 39.3%, with China importing nearly three times the volume from Brazil compared to the U.S. Brazil serves as a crucial source of energy and natural resources for China, and also supplies a range of commodities including meat and soybeans. During President Lula's visit to China for the 2023 Brazil-China Economic Seminar, 20 agreements were signed, aiming to facilitate and expand bilateral trade relations. Lula was accompanied by 523 business delegates during the 5-day trip, a stark contrast to his one-day visit to the U.S., where no trade agreements were reached.

Interestingly, despite Bolsonaro's vocal criticism of China, economic ties between China and Brazil remained robust during his administration, largely due to strong connections between China and local governments in Brazil. Serving as the primary trading partner for 20 out of Brazil's 27 states, China has offered financial assistance and medical supplies to local governments throughout the pandemic, despite tensions with the Bolsonaro administration. Institutions like the National Front of Mayors have facilitated Brazilian mayors in pursuing economic collaboration with China. During the pandemic, they directly engaged with Chinese vaccine manufacturers to import vaccine production materials from Chinese laboratories, enabling the production of over 90% of domestic vaccines. Therefore, the interdependence between Brazil and China can be characterized as structural rather than opportunistic.

Investment & Foreign Direct Investment

The United States is Brazil's largest investor. According to the Economic Commission for Latin America and the Caribbean, FDI from the U.S. accounted for 24% of Brazil's total FDI in 2022, which was approximately four times the investment from China. However, Chinese investment in Brazil is growing under Lula's presidency, focusing on new infrastructure and energy ventures and high-quality technology in the services and telecommunications sectors. Recently, China's state-owned power company, State Grid, emerged as the winner in Brazil's largest-ever electricity transmission line auction and announced a plan in April 2024 to invest an additional 200 billion reais in the Latin American power, supplementing its original 18.1 billion reais investment following the auction.

De-dollarization

Brazil, as one of the largest commodities exporters, conducts most of its trade in U.S. dollars. Yet, during Lula's visit to China in 2023, a deal was made to trade in the two developing powers' own currencies. The agreement would enable Chinese renminbi-denominated trade and financial transactions to be executed by two of China's largest state-owned banks, reducing transaction costs. It is worth noting that the mechanism is optional, and the U.S. dollar will likely still remain the primary foreign currency used to transact in the short run. Despite the limited near-term impacts, the deal will boost the potential for future de-dollarization schemes, driven by China's vision of renminbi internationalization and Lula's support for creating a common regional currency in Latin America.

Revealed Preferences

Despite political turbulence, Brazil has embraced China's rise by strengthening bilateral economic relations. While the U.S. remains Brazil's top foreign investor, with investments primarily originating from the private sector, China's state-owned enterprises are swiftly catching up, particularly in sectors like infrastructure and technology. Bolstered by robust networks with local government officials, China's economic collaboration with Brazil has proven resilient, laying the groundwork for future cooperation on critical issues that challenge the prevailing global economic order, such as renminbi internationalization. Brazil's status as the largest economy in Latin America, its vast market, considerable trade potential, and significant importance in the global commodity market, give it great leverage in the U.S.-China strategic competition. Consequently, Brazil enjoys relatively robust autonomy in the economic sector. However, Brazil remains vulnerable due to its reliance on the U.S. dollar for international trade and loans, as well as its dependence on foreign technology.

Technology

Technological development is a central pillar of Brazil's new industrial policy under President Lula. A significant investment of \$60 billion aims to enhance capabilities in biotechnology, chip development, and systems that bolster national sovereignty. Prioritizing sustainability and innovation, Brazil seeks to propel national development by fostering technological advancements to create better job opportunities, attract investments, and increase international competitiveness. Key initiatives include digitizing 90% of industrial businesses, boosting semiconductor production, and improving urban wellbeing through the promotion of electric vehicles and reduction in commute times. The U.S. does not have any direct interests or initiatives under which it is pursuing technological collaboration with Brazil. Conversely, for China, Brazil is an important and influential regional partner as part of institutions like BRICS. Technological cooperation between Beijing and Brasilia has been a key part of their economic and strategic ties.

Technology Alignment Metrics

Securitized Technologies

Brazil has found a willing and able partner in China in its endeavor to develop its industry through investment and technology. Technological collaboration with Beijing includes setting up a semiconductor factory in Brazil and using Huawei's 5G equipment.

Collaboration with China has only gathered pace under President Lula. On his trip to China in April 2023, Lula sought Chinese technology and investment to develop Brazil's semiconductor industry, including the establishment of a semiconductor factory in the country, and visited Huawei's research center, remarking it to be "a demonstration that we want to tell the world we don't have prejudices in our relations with the Chinese."

Still, technological cooperation with Beijing was growing during the Bolsonaro administration as well. It was during his term that Huawei's 5G equipment was allowed into the country's telecom network. Interestingly, Bolsonaro had debated following suit with the U.S. and banning Huawei, but he dropped the idea due to lobbying by cellular carriers that had already invested in cheaper Chinese equipment.

Non-securitized Technologies

Technological collaboration with Beijing centers on the domestic production of communications and microelectronics equipment. Brazil's technological cooperation with the U.S. is substantially less than that with China. Part of the reason is the availability of programs and investment opportunities that Brasilia can readily tap into. While the BRICS platform provides opportunities for the two countries to find ways to enhance their state-led cooperation, the lack of such effective forums hinders Brazil-U.S. ties.

Space

The Brazil-China technological cooperation also has a significant aerospace component to it. The China-Brazil Earth Resource Satellite (CBERS) program was launched in 1988 for meteorological and telecommunication purposes in geostationary orbit. It includes the development of communication satellites, remote-sensing observation and image-processing satellites, launching rockets, and sounding rockets. The program has been vital for Brazil in the areas of deforestation control and environmental monitoring in the Amazon region, water resources monitoring, urban growth, and soil occupation, as well as for educational purposes. Between 1984 and 2022, Brazil and China signed 24 bilateral diplomatic documents formalizing cooperation in the satellite sector.

Revealed Preferences

While Brasilia has signaled that it is not choosing sides between the U.S. and China, it has made it clear that it does not subscribe to Washington's views on securitized technologies and is willing to work with Chinese technological entities – even in the securitized fields of 5G and semiconductors – for its own development and prosperity. Further, Brazilian leaders and officials see China's rise as a way to soft balance against the U.S. and temper its unilateralism. They have even stated that they are not afraid of standing up to the "big bad wolf," referring to the U.S. This trend will likely continue wherein Brazil pivots toward a more robust and multifaceted technological collaboration with China.

Global Challenges

Brazil's approach to addressing global challenges is guided by its foreign policy of strategic equidistance within a multipolar order, a stance initiated in the 1960s. This approach involves navigating between: (i) multilateral initiatives led by either of the great powers; (ii) bilateral relations with both Washington and Beijing; and (iii) contradictory positions on contentious issues. The U.S. aims to maintain Brazil as a valuable partner and to counteract Beijing's growing influence in Latin America. Consequently, Washington continues to support Brazil's efforts in addressing global challenges, particularly climate change, with a focus on combating deforestation, and enhancing pandemic preparedness and response. These areas align with Washington's interests, as they may directly impact its food security and its role as a global leader in coordinating efforts to address global challenges in the future. China, on the other hand, seeks to enhance its diplomatic and political influence among Latin American nations, and its relationship with Brazil represents a crucial component of this endeavor. It aims to do so by enmeshing Brazil in its global initiatives and attempting to diminish U.S. influence in Brazil by establishing new bilateral frameworks that can offset the mechanisms of the United States.

Global Challenges Alignment Metrics

Multilateral Initiatives

Brazil actively seeks to maintain its equidistance by participating in both U.S.-led and China-led initiatives. A significant example of this is Brazil's involvement in the formation of BRICS in 2009, signifying its ambition to diversify away from Western-led organizations and initiatives. At the same time, Brazil also participates in other multilateral organizations, such as the G20, the IMF, the World Bank, and the WTO. In 2023, it also joined the Partnership for Atlantic Cooperation, spearheaded by Washington, which aims to collaborate on common challenges. Interestingly, Brazil does not want BRICS and other China-led organizations to be seen as a counterweight to Western-led ones. This narrative runs counter with the one China has been explicitly implying through BRICS and its South-South cooperation narrative, which is “an antithesis of the North-South cooperation.” Brazil's approach subtly challenges China's narrative, indicating that it is not entirely aligned with China's objectives. Brazil maintains sufficient strategic independence to select which multilateral initiatives it wants to join based on the benefits they offer in advancing Brazil's national interests. For example, Brazil does not seem keen to join China's Belt and Road Initiative. This reluctance stems from Brazil's assessment that joining the initiative would bring only marginal benefits. This discernment in participation demonstrates Brazil's efforts to avoid overly aligning with Beijing.

Climate Change

Brazil and the U.S. collaborate through the high-level U.S.-Brazil Climate Change Working Group, established in 2015 and further enhanced in 2023. Similarly, in 2023, China and Brazil established a special subcommittee on climate change within the Sino-Brazilian High-level Commission for Consultation and Cooperation (COSBAN), focusing on policy and technical cooperation. Brazil receives financial support from both the U.S. and China. In 2023, Washington announced a renewed contribution to Brazil's Amazon Fund, while China and Brazil are in negotiations to establish a green investment fund to finance and subsidize green and renewable energy projects. Washington resumed its funding for the Amazon Fund under Lula's presidency. This is significant as Lula advocates for a “benign multipolar system” centered on maintaining friendly relations with all parties. And, China's new bilateral fund with Brazil can be seen as a counterweight to the Amazon Fund, which is completely funded by Washington and allies. Thus, Brazil benefits from keeping an equidistance between Washington and Beijing.

Health

Brazil maintains relatively stable and cooperative relations with both Washington and Beijing in the global health sector. While there are some areas of overlapping cooperation between U.S.-Brazil and Sino-Brazilian cooperation, it remains uncertain whether Washington and Beijing will engage in joint initiatives with Brazil in the future.

Human Rights

Brazil demonstrates flexibility in its interactions with Washington and Beijing depending on its core interests. On one hand, Brazil closely cooperates with the U.S. on shared interests, such as police violence, racial bias, and gender equity. Cooperation with the U.S. is deemed vital by Brazil as it aligns with its interests in bolstering judicial independence, combating disinformation, and addressing related security challenges including organized crime, emerging criminal networks, and increasing cybercrime.

On the other hand, in recent years, Brazil has shown signs of tolerating China's alleged human rights abuses within its domestic sphere. In 2019, Brazil refrained from endorsing a joint UN statement condemning the situation in Xinjiang. Similarly, in 2022, it abstained from a resolution enabling the UN Human Rights Council to discuss the human rights situation in Xinjiang, a move viewed as a setback for Western nations, particularly considering the U.S. was among the resolution's proponents.

Revealed Preferences

Brazil's policy of strategic equidistance within a multipolar order indicates a desire to maintain balanced relations with both the US and China. This stance involves navigating between multilateral initiatives led by either great power, bilateral relations with both Washington and Beijing, and contradictory positions on contentious issues. Moreover, Brazil demonstrates flexibility in its approach to human rights, closely cooperating with the U.S. on shared interests but showing signs of tolerance towards China's alleged human rights abuses. Brasilia's abstention from endorsing UN statements condemning human rights abuses in Xinjiang suggests a reluctance to antagonize China.

Overall Observations

Amidst the U.S.-China strategic competition, Brazil's diplomatic and military strategies exemplify a delicate balancing act, leveraging its MNNA status with the U.S. for training and technological advancement while maintaining a diplomatic partnership with China to uphold its strategic autonomy and influence. Although Brazil exhibits moderate alignment with the U.S. as a security partner, its overarching autonomy in shaping its security policy is constrained by regional ties to the U.S. In embracing China's rise, Brazil strengthens bilateral economic relations, with Chinese state-owned enterprises increasingly investing in sectors like infrastructure and technology. While Brazil enjoys robust autonomy in the economic sector due to its market size and trade potential, it remains vulnerable due to reliance on the U.S. dollar and foreign technology. Despite not choosing sides between the U.S. and China, Brazil is willing to collaborate with Chinese technological entities on securitized, non-securitized, space-related advanced technologies alike, signaling a pivot toward technological collaboration with China. The fact that Brazil is trending closer to China in the technology sector is due in large part to the U.S. not focusing its strategic attention on South America. Brazil's policy of strategic equidistance in a multipolar order underscores its desire to maintain balanced relations with both great powers, navigating multilateral initiatives and bilateral relations while demonstrating flexibility in human rights approaches to avoid antagonizing either the U.S. or China.

South Africa

SECTORS | OVERALL OBSERVATIONS



Security

South Africa's security strategy derives from three main interests to maintain domestic and regional stability. Firstly, it seeks to combat terrorism, ensure the security of its maritime domains, and tackle cybersecurity threats. Secondly, it seeks to secure its investments and trade routes as well as reduce illicit financial flows to violent insurgencies and extremist groups in Africa. Thirdly, it aims to play a constructive role in international forums like the UN and the African Union (AU), such as through peacekeeping efforts. South Africa is an important partner for the U.S. to leverage its strategic position and influence in the continent through enhancing regional stability and counteracting extremist threats. Conversely, China wants to expand its security footprint across Africa by tightening its relations with South Africa.

Security Alignment Metrics

Post-Cold War Conflicts

South Africa has participated in peacekeeping missions in the African continent, most recently in the peacekeeping missions in Burundi, Sudan, and the Democratic Republic of Congo. In the past decade, South Africa has consistently been in the top 15 troop-contributing countries to the UN peacekeeping missions, ranging between 1,500 to 2,500 personnel.

Military Alliances & Partnerships

South Africa does not have a formal military alliance with either the United States or China. However, it has defense cooperation agreements with both countries, reflecting an ostensibly balanced foreign policy approach.

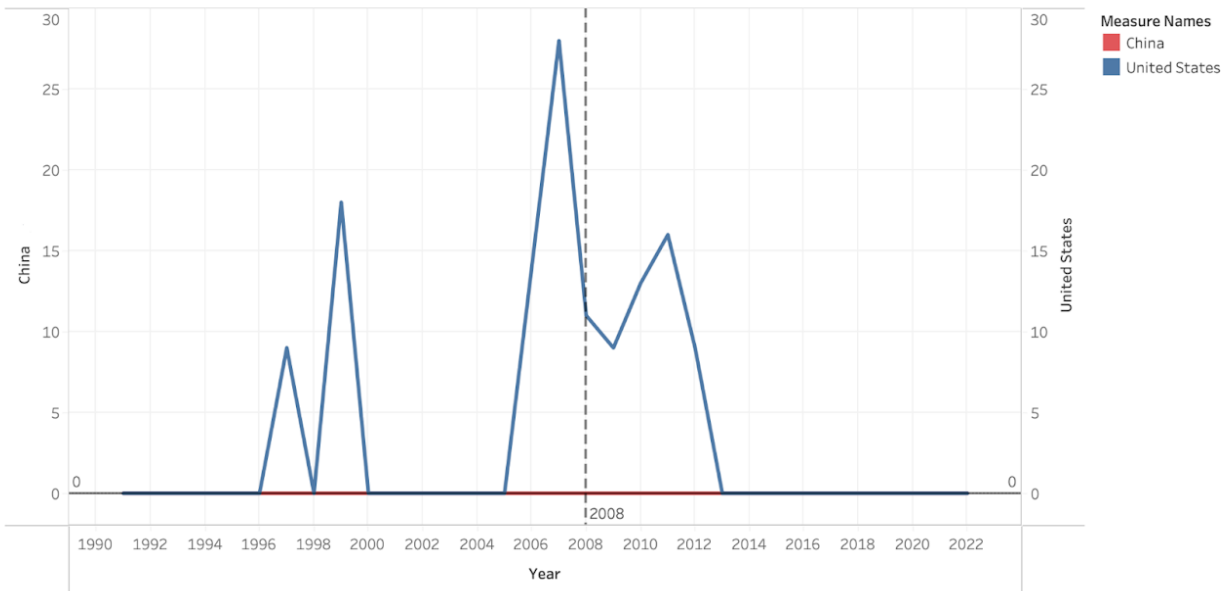
Strategic Diplomacy

South Africa's voting patterns in the UN demonstrate a balancing act between the U.S. and China based on its strategic interests on specific issues. For example, South Africa voted in favor of United Nations Security Council Resolution 1973 in 2011, authorizing military action in Libya to protect civilians, in contrast to China's abstention. It also voted in favor of the United Nations General Assembly resolution A/ES-10/L.27 in 2023 over the war in Gaza. However, South Africa abstained from voting on the UN General Assembly resolution A/RES/ES-11/1 in 2022, which demanded Russia to withdraw its military forces from Ukraine. This vote showcased its diplomatic stance of non-alignment in global conflicts, in the same fashion as China.

Arms Sales

U.S. arms sales to South Africa fluctuated during the early years of the competition before plummeting to zero in 2013 (see Figure 5 on the following page). It is worth noting that, even before the 2013 drop, the volume of U.S. arms sales to RSA was nowhere near the level of sales to Brazil, India, and Saudi Arabia between 2006 – 2022. These sales surpassed the highest value for South Africa during the same period by magnitudes of 4.5, 40, and 112, respectively. Thus, arms sales have not constituted a central pillar of the U.S.–RSA relationship. This is partly due to the strong defense-industrial base in South Africa which reduces its dependence on external arms suppliers. Consequently this gives Pretoria autonomy as an arms exporter.

Figure 5. Comparative US-China arms sales to South Africa, 1991-2022



The trends of China and United States arms sales to South Africa from 1991-2022. Figures are measured in millions of SIPRI trend-indicator values (TIVs). The SIPRI TIV is a measure of the volume of international transfers of major arms. A '0' indicates that the volume of deliveries is between 0 and 0.5 million SIPRI TIV.
Data Source: SIPRI

South Africa threads the needle of multi-alignment within the security sector. One example is when Lady R – a Russian ship sanctioned by the U.S. – docked at a South African naval base, causing an arms sale investigation in 2022. Consequently, this caused a bilateral fallout between Pretoria and Washington. This case represents an instance where South Africa was accused of using its strategic autonomy for purposes that diverged sharply with U.S. interests. The divergence in interests was so fundamental that the U.S. chose to punish, rather than accommodate, South Africa’s behavior, which will be explored in later sections.

Military Exercises

South Africa has had a weak participation record in the U.S.-led multilateral military exercises during the 2008-2023 period. It is reported that South Africa stopped participating in the U.S.-led communications exercises with NATO and African nations after 2007. On the other hand, Pretoria still participated in exercises that were critical to its interests. Throughout the 2010s, South Africa participated in the U.S.-led multilateral maritime exercises and bilateral exercises with the New York Army National Guard. Its decision to continue this training with the U.S. is implied to bring benefits from engagement with Washington on this front.

This sub-sector signifies a shift in alignment towards China. In the 2010s, China did not act as the primary substitute for the U.S.-led exercises in South Africa. However, the RSA-PRC military relationship turned heads in 2019 and again in 2023, coinciding with the one-year anniversary of Russia’s 2022 invasion of Ukraine, when the two nations undertook joint maritime drills with Russia. The latter exercise did not provoke a strongly worded response from Washington. Coupled with South Africa’s low level of engagement with the U.S. military, indicates. Washington’s mild response indicates that Pretoria is of sufficient strategic importance that the former is willing to look the other way to protect the overall partnership.

Military Bases

The United States and China both do not have military bases in South Africa. However, Pretoria has been accepting aid from Washington to expand its bases. In 2013 and 2022, South Africa accepted multi-billion funding from China to expand its Richards Bay and Durban ports respectively. Both the Durban and Richards Bay ports were used to support the RSA-PRC-RUS naval exercise in 2023. The PRC's investments in dual-use ports suggest a step towards greater PRC commercial shipping and naval presence in South Africa in the medium-term future.

Revealed Preferences

South Africa's behavior reveals a preference for closer cooperation with China in the security sector. However, there are still areas in which it has shown willingness to cooperate with Washington, as long as these can fulfill Pretoria's interests. Diplomatically, Pretoria still retains its historic policy of non-alignment.

Economy

South Africa's economic interests are centered on pursuing economic growth and maintaining its status as an economic powerhouse in terms of industrialization, technology advancement, and economic diversification. The United States is interested in enhancing its developed industries and financial market through its partnership with South Africa. China is interested in trade and investment on infrastructure projects in South Africa to absorb its industrial overcapacity. South Africa also plays a crucial role for China to have greater access to other markets on the African continent and for RMB internationalization.

Economic Alignment Metrics

Trade

Over the past three decades, South Africa has made state-led efforts to move closer to China economically, particularly through its membership in the BRICS and BRI. The two countries agreed to improve value-added and agricultural exports to China and to increase investments in manufacturing and assembly as well as technology transfers. This results in China being South Africa's largest trading partner. Meanwhile, the U.S. has a less robust relationship with South Africa, even if it is the second-largest trading partner with Pretoria. Their imports and export flows remain steady, despite U.S. tariffs on steel and aluminum imports. Recently, as the relations between South Africa and the U.S. turned south, the latter has started signaling punishment. For instance, South Africa has benefitted from America's African Growth and Opportunity Act (AGOA), with some of its exports to the U.S. free of duty. However, AGOA eligibility has come under repeated criticism by the U.S. Congress due to its recent military activities with Russia.

Investment & Foreign Direct Investment

South Africa remains a popular investment destination for U.S. companies as one of the fastest-growing consumer markets in the world. FDI from the U.S. is centered on manufacturing, professional services and technology. However, such investments made were mostly owing to global strategies of the U.S. private sector, with Washington's limited facilitating role. China's economic ties with South Africa continue to deepen under the BRI and BRICS frameworks and a 2010 comprehensive strategic partnership pact. Unlike Washington, Beijing and its state-owned enterprises have spearheaded investment in South Africa.

Borrowing Behavior

South Africa's state-owned enterprises have become more reliant on Chinese loans in recent years. This is more critical as, despite a lack of transparency in loan terms, critical state-owned enterprises, such as Eskom – the largest electricity supplier in South Africa – are also dependent on loans. It seems that South Africa does not take any loans from the U.S. However, Pretoria has received loans amounting to billions of dollars from the IMF and the World Bank.

Sanction Alignment

South Africa has shown negative reactions towards U.S. sanctions towards Russia, due to its dependence on trade and historical links with Moscow. Recovering from the socio-economic repercussions of COVID-19, South Africa's economy and food security have been facing disruptions in food imports from both Russia and Ukraine due to the war. South African President Ramaphosa claimed that “bystander countries” would suffer due to sanctions against Russia.

De-dollarization

Due to U.S.'s high interest rates and Pretoria's dollar-denominated loans, South Africa has actively engaged in the financial infrastructure needed for RMB-denominated cross-border payments set up by China. In 2015, the two countries signed a bilateral currency swap agreement, allowing South Africa to borrow 30 billion RMB from China's central Bank to pay for Chinese imports without using U.S. dollar reserves. An offshore RMB clearing bank was also set up in the African nation in the same year, reinforcing Beijing's efforts to internationalize its currency.

Revealed Preferences

South Africa aligns itself closer with China economically. Pretoria's economic ties with China have deepened, facilitated by state-led efforts and participation in initiatives like the BRICS and BRI. South Africa's greatest leverage is its relatively developed industries and market. Its vulnerability, however, lies in its struggle to achieve economic growth partially due to the indebtedness and inefficiency of its state-owned enterprises. On the other hand, South Africa's borrowing behavior reflects a growing dependence on Chinese loans. Meanwhile, South Africa's trade partnership with the U.S. faces challenges such as trade disputes and criticism of its AGOA eligibility. The stance on sanctions alignment and de-dollarization underscores further rifts between the two countries.

Technology

South Africa's policy on technology centers on pursuing the Fourth Industrial Revolution and digitalizing its economy. In this endeavor, investment from China in digital infrastructure – under its “Digital Silk Road” initiative – and government subsidies are highly attractive and cost-effective options for Pretoria. Beijing's financing options, technical assistance, and training to African governments on topics ranging from digital forensic techniques to cybersecurity add to the value of technological cooperation with Chinese entities. For China, South Africa is an important and influential regional partner, and part of institutions like the BRI, BRICS, and the Global South. The U.S., on the other hand, does not have any direct interests or initiatives under which it is pursuing technological collaboration with South Africa. Yet, Washington is concerned over South Africa's use of Chinese technology and its relationship with democratic backsliding in the country.

Technology Alignment Metrics

Securitized Technologies

South Africa's technological partnerships with China, through Huawei and ZTE, show that the former does not subscribe to the U.S. views on securitized technologies. Consequently, Pretoria is willing to work with Chinese technological entities for its own development and economic prosperity. China's Huawei and ZTE have become major players in South Africa. Huawei's 5G equipment has been allowed in the country's network and it has partnered with domestic telecommunications operators like Vodacom and MTN. Huawei is also involved in upgrading the fiber optics network, in collaboration with South Africa's Telkom. South Africa's ambassador to BRICS has even remarked that the country will not succumb to pressure from the U.S. to stop using Huawei equipment in its networks. Legislators in the U.S. have criticized South Africa's use of Chinese technology and called on President Biden to review their bilateral relationship, concerned about surveillance equipment and Huawei's 5G network. The example of the South Africa-based Vumacam has been cited, which operates about 2,000 cameras in Johannesburg, aimed at combating crime in the city, but has partnered with China's Hikvision – which has been banned in the U.S. – for the cameras' hardware.

Non-securitized Technologies

South Africa's close collaborations with the U.S. and China as technology partners are more pronounced in terms of non-securitized technologies. U.S. companies have an active presence in South Africa. IBM has established a cloud data center in the country to provide its clients with a complete portfolio of cloud services. This is the result of close collaboration with South African firms Gijima and Vodacom. Amazon Web Services has also opened a data center in Cape Town. CISCO and Dell both have training academies within South Africa to assist with the development of skilled labor within this sector. Meanwhile, Chinese companies have been rapidly deploying technologies related to telecommunications, mobile payments, smart cities and underwater fiber networks across Africa. For example, digital mobile banking platform M-Pesa – with more than 50 million users processing more than \$314 billion in transactions annually – has migrated to Huawei's Mobile Money Platform. Huawei's technology is also being used in smart-city initiatives, with facial recognition, artificial intelligence, data analytics, and 5G networks being deployed to enhance urban management, augment public safety, and spur economic development.

Space

South Africa has close relations with both China and the U.S. in space cooperation. South Africa and China are cooperating on space exploration and have signed agreements on human spaceflight and the International Lunar Research Station, a lunar research base backed by China and Russia. But, Pretoria also has space cooperation with the U.S., including a partnership between NASA and the South African National Space Agency on lunar exploration and a communications site that will support the Artemis campaign.

Revealed Preferences

South Africa is pivoting towards China in the technology sector. The growing partnership is driven by Pretoria's unwillingness to subscribe to the U.S. views on securitized technologies and its willingness to work with Chinese technological entities for its own development and economic prosperity. This also shows South Africa's leverage in industrialized areas to get access to advanced technologies to advance its interests. Not only does the U.S. not have an attractive alternative to China's economic and technological programs, but its strategic attention is not directed toward Pretoria. Furthermore, concerns over South Africa's democratic backsliding have put additional pressure on Washington to re-evaluate its bilateral ties. Unsurprisingly, this factor does not limit Pretoria's relationship with Beijing.

Global Challenges

South Africa's strategic policy in the global challenges sector is driven by its ambition to be a regional player vis-a-vis a multilateral world order. The following paragraphs will discuss the most apparent areas in showcasing the above points: multilateral initiatives, climate change, and human rights. Washington's interest is to keep South Africa from completely aligning with China. Unlike other sectors, Washington has demonstrated its willingness to cooperate through supporting Pretoria through multilateral initiatives and managing common global challenges. China's interest is to intertwine Pretoria's interests with its increasing presence and influence in Africa. By doing so, it has taken advantage of South Africa's ambition in promoting a multipolar world order.

Global Challenges Alignment Metrics

Multilateral Initiatives

South Africa has received strong backing from China for the latter's initiatives, such as Forum on China-Africa Cooperation (FOCAC) and BRICS. South Africa officially joined BRICS in 2011, under China's invitation. With its participation in BRICS, South Africa is moving closer to its foreign policy goals towards a multipolar world. At the same time, South Africa has little say since it is the financially weakest country in the membership. This implies South Africa has less decision-making independence in this initiative than other financially stronger members. As mentioned in the economic sector, Pretoria faces punishments when it interferes with Washington's interests. With the heightened tension between Washington and Pretoria, AGOA serves as a punishment mechanism, especially when its eligibility is under scrutiny. Despite these challenges, Pretoria still hosted the 20th AGOA Summit in 2023, despite dissenting voices in Washington.

Climate Change

South Africa has strong cooperation with China and the U.S. on climate change. South Africa is a member of BASIC with China, advocating for developed states to lead emissions while allowing developing nations time for development parity. On the basis of its multilateral cooperation, South Africa extracted cooperation from China through multiple memorandums of understanding within climate change. On the other hand, South Africa also manages to extract funding from the U.S. and Western countries. Washington has assisted South Africa in reaching its emission reduction goal by 2030. Notably, through the Just Energy Transition Partnership (JETP), the U.S., along with other Western countries, will support Pretoria's transition away from fossil fuels with the total funding of \$8.5 billion. South Africa was announced as the first recipient country to participate during the partnership announcement. There has yet to be talk about the latter stopping support for South Africa's JETP, despite the current relationship status between the two countries.

Health

South Africa has strong cooperation with both the U.S. and China in health. For years, the U.S. has collaborated with and financially supported South Africa in many fields, and especially in their joint bilateral response to the COVID-19 pandemic. Multilaterally, Washington has also long collaborated with Pretoria through the AU and the Africa Centres for Disease Control and Prevention. China has emerged as a key player in supporting health initiatives in South Africa. China's financial aid to South Africa's healthcare system focuses on basic infrastructure and public amenities. Multilaterally, Beijing and Pretoria have deepened their cooperation on disease prevention and infrastructure development through platforms of South-South cooperation and FOCAC.

Human Rights

South Africa has been aligning with China in terms of human rights. This is observed as a direct influence of China's investments in Africa, including South Africa, undermining efforts to improve human rights and governance, potentially leading to democratic backsliding. This also shows South Africa's willingness, to some extent, to forgo its principles to achieve and sustain economic growth. This contrasts the previous pivot states, where they can maneuver to avoid changing their stances on contentious issues. On the contrary, Pretoria has been drifting away from Washington. In recent years, this relationship has faced some challenges, particularly concerning South Africa's perceptions of U.S. hegemony and its views on U.S.-led military interventions. These disagreements have led to tensions, with South Africa sometimes criticizing what it perceives as U.S. abuses of power. This is a shift from the historically strong relations between the two countries on human rights.

Revealed Preferences

Based on the selected metrics, South Africa has shown alignment with China in the global challenges sector, despite some signs of cooperation with the U.S. Given the recent decline in relations between the U.S. and South Africa, the latter's further pivoting towards China seems more apparent. Pretoria's preference for Beijing serves both as the former's source of leverage and regional initiatives. On the one hand, China has supported South Africa's participation in its initiatives. On the other, South Africa's maneuvering room to strengthen cooperation with the U.S. has decreased with China's increased involvement. In fact, with the current examples of punishment from the U.S., it seems that South Africa has weak autonomy overall.

Overall Observations

South Africa's evolving security dynamics, deepening economic ties, cooperation in technology, and global challenges with China all underscore the pivoting point towards China. However, there still remain areas where Pretoria has Washington's support. While South Africa has not had formal alliance with either great powers, recently, it has shown signs of pivot towards China under trilateral exercises with Beijing and Moscow. The pivot to China can also be seen in the economy, technology, and common global challenges sectors. Economics becomes the first sector in which there are signs of punishment for this pivot coming from Washington. At the same time, Pretoria's increasing dependence on Beijing raises concerns about its strategic autonomy. This concern is demonstrated in South Africa's recent support to China in human rights issues - a clear shift from its historically strong ties with the U.S. in this aspect.

Implications

OVERVIEW | COUNTRIES

SUDDEN BREAKDOWN IN RELATIONS



Overview

The following analysis builds upon the previous case study findings to predict the evolution of pivot state behavior within the context of the U.S.-China competition in the medium-term future. The central assumption of this analysis is that the bilateral relationship between the United States and China will continue along a path of managed decline, meaning no detente and no significant escalations. Steady deterioration in the U.S.-China relationship will constrain the pivot states' maneuvering room to multi-align themselves across sectors. Their ability to extract concessions in particular sectors will depend upon their vulnerabilities and leverages in the great powers' respective regional strategies. This section aims to understand how the structural pressure of intensifying competition will impact the alignment profile of our four pivot states in the medium-term of the next 5-7 years. The findings will affect how the U.S. and China manage their relationship with each other, and the pivot states themselves.

The following analysis will methodically examine each pivot state, aiming to:

1. Summarize the trends in observed behavior during the competition period to-date;
2. Identify forward-looking interests in each sector
3. Deduce potential directions of future pivot state foreign policy based on observed trends and interests;
4. Offer strategic recommendations for both the U.S. and China to more effectively address the needs of these countries.

This assessment will operate under the premise that the bilateral relationship between the U.S. and China will persist in a state of managed decline. Finally, the assumption of managed decline will be relaxed to consider how a breakdown in the Sino-American relationship might impact the pivot states.

India

India's Observed Trends

India leans strongly towards the U.S. as its preferred partner. As seen in the table below, India has a strong alignment with the U.S. across all sectors of the competition based on the metrics used in this report. Nonetheless, there remain sub-sectors of competition where India has demonstrated closer cooperation with China, such as trade and sanctions alignment in the economic sector.

Color Code		USA	=	CHN	INDIA	
SECTOR METRICS		TREND	SECTOR TREND			
SECURITY	Diplomacy Arms Sales Exercises, Bases Military Alliances				USA > CHN	
ECONOMY	Trade Investment Sanction Alignment De-dollarization				USA > CHN	
TECHNOLOGY	Securitized Non-securitized Space				USA > CHN	
GLOBAL CHALLENGES	Int'l/Reg Org Climate Change Health Human Rights				USA > CHN	
OVERALL TREND under managed decline		USA > CHN				

India’s Forward-looking Interests

Sector	Interests
Security	<ul style="list-style-type: none"> • Territorial integrity; includes avoiding unnecessary escalations in the border dispute. • Freedom of navigation through crucial Indo-Pacific maritime corridors • No entanglement in complex alliance system
Economics	<ul style="list-style-type: none"> • Trade partner diversification • Foreign investment from non-Chinese sources
Technology	<ul style="list-style-type: none"> • Access to advanced technologies • Reduce reliance on Chinese entities and supply chains
Common Global Challenges	<ul style="list-style-type: none"> • Enhancement of self-led regional initiatives • Autonomy to multi-align on specific areas of climate change and health

India’s Future Policy Projections

Security: India will continue to engage in multilateral cooperation with the U.S. and likeminded regional partners to counterbalance China's influence, while maintaining a degree of distance in bilateral ties. India will be reluctant to give up its official policy of multi-alignment, so it will explore all options short of a treaty alliance to send deterrent messages to China against its revisionism and territorial aggression.

Economics: India will continue to emphasize bolstering its domestic production base and diversifying its partnerships. As will its efforts to attract non-Chinese foreign investment to drive sustainable economic growth and development while reducing dependence on China.

Technology: India will continue to prioritize its technological relationship with the U.S. and U.S.-based entities to receive foreign investment and advanced technologies that bolster its national security and economy, and create jobs. At the same time, India will allow Chinese technology companies to operate in non-critical sectors – like low-cost consumer equipment and the competitive auto industry – albeit under scrutiny and a strict regulatory framework.

Global Common Challenges: India’s alignment with the U.S. will continue in the near future. So far, there has yet to be any punishment from China in this sector due to the clear alignment towards the U.S.; the lack of deep cooperation will continue in the near future. There might be attempts to diversify cooperation with China through multilateral platforms, but not in the bilateral platforms.

Future policy towards India: how to better meet its medium-term interests?

United States

Sector	Recommendations
Security	<ul style="list-style-type: none"> • Offer more mini-lateral defence cooperation opportunities for training, interoperability, and contingency planning. • Work more closely with India on developing dual-use, securitized technologies (crossover with technology policy). • Build on agreements like the Master Ship Repair Agreement to gain access to dual-use ports.
Economics	<ul style="list-style-type: none"> • Enhance bilateral trade. • Negotiate with India to maintain low tariffs and remove trade barriers. • Negotiate to reinstate India's eligibility for preferences under the GSP program.
Technology	<ul style="list-style-type: none"> • Enhance bilateral cooperation through ambitious co-development and joint production ventures. • Institutionalize processes to identify and transfer advanced technologies. • Incentivize U.S. and allied entities to enhance technological collaborations in India.
Common Global Challenges	<ul style="list-style-type: none"> • Support India-led initiatives through financial support and active participation in its projects. • Build mini-lateral and bilateral initiatives in areas of common interests, such as energy diversification and climate finance.

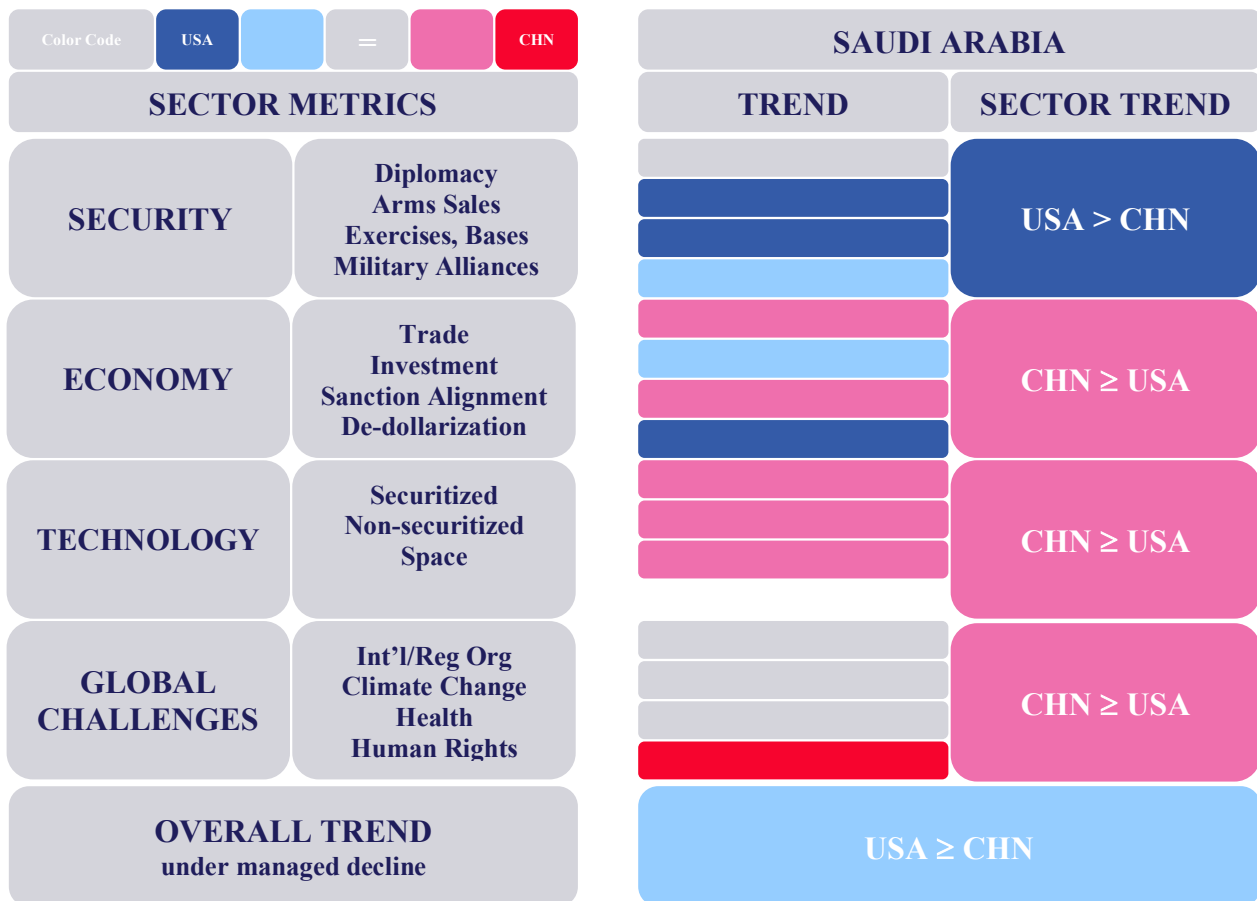
China

Sector	Recommendations
Security	<ul style="list-style-type: none"> • Good faith attempts to de-escalate the border conflict, such as moving forces back from their forward positions and/or dispersing units to their peacetime bases. • Negotiations for both sides to save face in the public eye amidst de-escalation. • Restart joint patrols in the disputed region.
Economics	<ul style="list-style-type: none"> • Decrease trust deficit regarding foreign direct investment.
Technology	<ul style="list-style-type: none"> • Offer collaboration in and transfer of advanced, non-securitized technologies. • Encourage domestic production of non-securitized technologies, equipment, and products.
Common Global Challenges	<ul style="list-style-type: none"> • Build bilateral initiatives using common groupings such as BASIC and BRICS as foundation. • Create mini-lateral and bilateral management mechanisms for transboundary issues. • Join India-led initiatives and actively support in good faith.

Saudi Arabia

Saudi Arabia's Observed Trends

As indicated in the table below, this report finds that Saudi Arabia has a moderate preference for the U.S. as an overall strategic partner. This moderate alignment is driven by overlapping regional interests and close, longstanding cooperation in the security sector. In the other three sectors – economics, technology, and global common challenges – Saudi Arabia has shown a moderate pivot towards China during the 2008-2023 period. This 1:3 alignment ratio prompts us to consider the weight of each sector's importance for the overall partner preference. This report argues that the volatility of the Middle East creates a threat environment such that Saudi Arabia must prioritize its security interests and maintain strong ties with its security guarantor. In this manner, credible security threats constrain Saudi Arabia's autonomy to pivot away from the United States. While recognizing that strong linkages exist between security, economics, and advanced technologies, security represents the fundamental foundation upon which the other two sectors are built and thus warrants greater weight when evaluating Saudi Arabia's overall alignment preference.



Saudi Arabia’s Forward-looking Interests

Sector	Interests
Security	<ul style="list-style-type: none"> • Sign and implement more substantive cooperative agreements with Iran to build on recent progress. • Reduce dependence on foreign arms exports. • Stabilize the Middle East with the help of the great powers, including through negotiated settlements and counterterrorism cooperation.
Economics	<ul style="list-style-type: none"> • Diversify economy away from oil. • Diversify trade partners. • Secure foreign investment to support diversification.
Technology	<ul style="list-style-type: none"> • Access advanced technologies. • Expand localized production to support economic diversification.
Common Global Challenges	<ul style="list-style-type: none"> • Expand renewable energy production. • Maintain autonomy to collaborate with both great powers on climate and health initiatives. • Maintain autonomy to act with impunity on human rights.

Saudi Arabia’s Future Policy Projections

Security: Saudi Arabia will persist in securing concessions from great powers through security deals and diplomatic mediation, notably with key regional actors like Israel and Iran (and its proxies). It will also continue military training with great powers in modern warfare and counterterrorism operations. However, as U.S.-China relations decline, Saudi Arabia's flexibility in playing the great powers against each other will diminish. Ultimately, if forced to choose, Saudi Arabia will likely side with the U.S. as its preferred partner. Domestically, Saudi Arabia will invest more in developing its indigenous defense-industrial base, focusing on light arms, drones, and armored vehicles.

Economics: Saudi Arabia will continue to diversify away from an oil-based economy under Vision 2030. Oil will continue to play a large role in financing the R&D and expansion of new industries until they are more mature. Saudi Arabia will also seek foreign investors to scale up sectors such as clean energy technology, public infrastructure, heavy industry, and IT.

Technology: Saudi Arabia will pursue further joint ventures with foreign partners to facilitate knowledge transfer, economic growth, and diversification. Saudi Arabia will pursue collaborations with both great powers on non-securitized technologies. Sino-Saudi collaboration on securitized technologies hinges on the evolution of Saudi-U.S. technology cooperation, which, in turn, depends on the security landscape. If Saudi Arabia deepens security cooperation with the U.S. due to deteriorating Iran-Saudi relations, Sino-Saudi collaborations on securitized technology will cease. Conversely, if Saudi leadership views close partnership

with China as vital for managing relations with Iran, Sino-Saudi collaboration on securitized technology will likely continue.

Global Common Challenges: Saudi Arabia will continue to partner with both great powers through multilateral and bilateral initiatives to advance its climate and health agenda. It will seek funding and technical support from both powers to develop clean energy technologies, such as clean hydrogen. Where its interests diverge with the U.S., Saudi Arabia will partner with China to protect its fossil fuel industry and deflect human rights criticisms for as long as it can. However, the decline in U.S.-China relations will increasingly constrain Saudi Arabia’s ability to act with impunity under the protection of multi-alignment. Thus, Saudi Arabia will need to reform its human rights approach to avoid cross-sectoral punishment (e.g. punishments in the security sector due to human rights violations).

Future policy towards India: how to better meet its medium-term interests?

United States

Sector	Recommendations
Security	<ul style="list-style-type: none"> • Broker a Saudi-Israel normalization deal that includes security guarantees for Saudi Arabia and concrete steps towards Palestinian statehood. • Use a “sticks and carrots” approach to condition arms sales on the implementation of human rights protections. Work in close conjunction with key Western partners, such as Germany and France, to create a united front on this effort, thus sweetening the rewards for compliance and intensifying the punishment for violations.
Economics	<ul style="list-style-type: none"> • Expand low-interest FDI in economic sectors that advance the goals of Vision 2030, particularly clean energy and low-carbon technologies.
Technology	<ul style="list-style-type: none"> • Deepen collaboration on non-securitized technologies to advance Vision 2030. • Negotiate a deal to institutionalize U.S.-Saudi collaboration on securitized technology and a civilian nuclear energy program, contingent on the expulsion of Huawei and termination of research partnerships with Chinese technology entities.
Common Global Challenges	<ul style="list-style-type: none"> • Use a stronger sticks and carrots approach to address Saudi human rights transgressions, as described in the security recommendations above. • Deepen partnerships towards a zero-carbon future with a focus on near-term natural gas reforming for hydrogen production, long-term clean hydrogen, and long-term low-carbon air conditioning technologies.

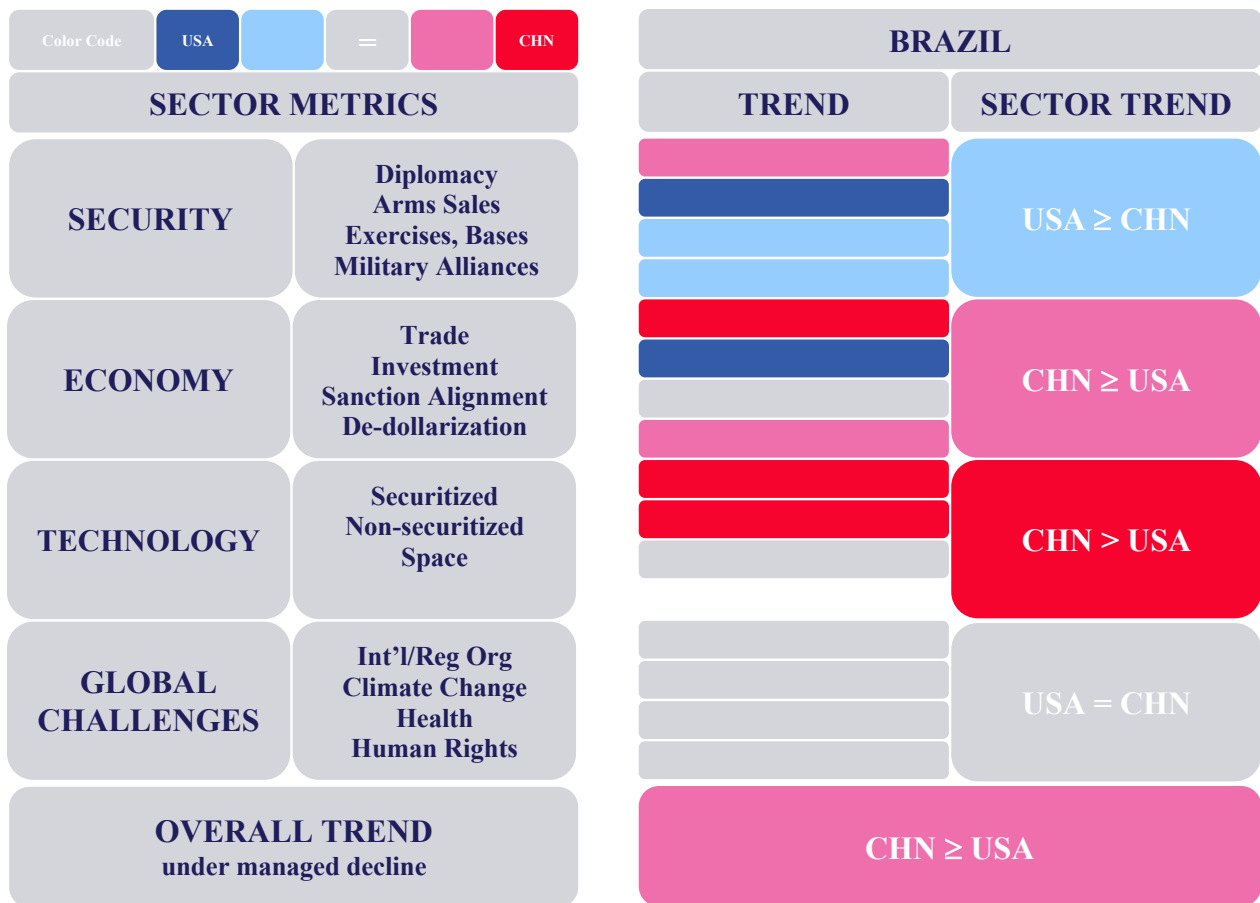
China

Sector	Recommendations
Security	<ul style="list-style-type: none"> • Institutionalize Blue Sword as an annual or bi-annual joint naval exercise, and explore the possibility of expanding cooperation on domestic counterterrorism training. • Help Saudi Arabia develop its domestic military-industrial capacity in line with the goals of Vision 2030. • Manage bilateral relations with the U.S. carefully. Offer credible security assurances to the U.S. to delay it from presenting KSA with an <i>alignment ultimatum</i>, thus giving the Sino-Saudi security partnership time to mature.
Economics	<ul style="list-style-type: none"> • Increase FDI in the non-oil sector to support vision 2030, particularly public infrastructure projects and clean technologies. • Expand trade in the non-oil sector to support Saudi economic diversification efforts. • Signal long-term demand for Saudi imports to ease over-dependence anxieties
Technology	<ul style="list-style-type: none"> • Prioritize non-securitized technology partnerships with lower risk exposure to U.S. tech securitization policies. • Build on existing technology collaboration to increase Saudi path dependency in this sector, thus building resilience to the U.S. securitization push. • Develop contingency plans to respond to a potential future Saudi ban on Huawei 5G.
Common Global Challenges	<ul style="list-style-type: none"> • Continue to partner on multilateral and bilateral climate initiatives. • Expand investment and partnerships for clean technology development and scaling, aligning with Saudi Arabia’s economic and climate interests. • Continue to offer an alternative source of arms and diplomatic support to bolster Saudi impunity.

Brazil

Brazil's Observed Trends

Brazil maintains a moderate alignment with China as its primary partner. Despite a moderate inclination toward the U.S. in security matters, Brasilia demonstrates moderate and strong alignment with Beijing in the technology and economics sectors, respectively. Concurrently, Brazil strategically maintains equidistance between the U.S. and China when addressing common global challenges. However, certain sub-sectors, such as arms sales, trade, and investment, reveal strong alignment with either great power.



Brazil's Forward-looking Interests

Sector	Interests
Security	<ul style="list-style-type: none"> Regional stability. Enhancement of defense and technological capabilities while maintaining autonomy.
Economics	<ul style="list-style-type: none"> Trade and investment partner diversification. Foreign investment in energy, infrastructure, and technology (cross-cutting with the technology sector).
Technology	<ul style="list-style-type: none"> Access to advanced technologies, such as biotechnology, chip development, and systems that bolster national sovereignty (cross-cutting with security sector)
Common Global Challenges	<ul style="list-style-type: none"> Bolster self-led regional initiatives and leadership role in non-Western led initiatives. Autonomy to align with multiple stakeholders on climate change and health issues.

Brazil's Future Policy Projections

Security: Brazil is expected to persist in its military collaboration with the U.S. through both bilateral and multilateral avenues, including South American joint military exercises and leveraging its MNNA (Major Non-NATO Ally) status. Strengthening this security partnership will ensure ongoing access to exclusive military cooperation opportunities and foster the advancement of technological capabilities.

Economics: Brazil will maintain its focus on strengthening trade ties with China while also promoting regional economic unity. Additionally, Brasilia will prioritize fostering investment opportunities with both the U.S. and China.

Technology: Brazil will continue to embrace collaboration with Chinese technological entities, across securitized, non-securitized, and space-related technologies, to advance its own development and prosperity. Nonetheless, Brazil will refrain from formally aligning with either the U.S. or China, opting instead to engage with both nations to attain cost-effective access to advanced technologies.

Global Common Challenges: Brazil will persist in its policy of maintaining equidistance between the U.S. and China, engaging actively in advantageous multilateral initiatives led by either major power, while concurrently nurturing improved bilateral relations. Moreover, Brasilia will uphold flexibility in addressing human rights, cooperating closely with the U.S. on shared interests while displaying tolerance towards China's alleged human rights abuses.

Future Policy towards Brazil: how to better meet its Medium-Term Interests?

United States

Sector	Recommendations
Security	<ul style="list-style-type: none"> • Enhance military cooperation by conducting more ambitious bilateral and multilateral training exercises. • Identify areas of closer cooperation under the MNNA status.
Economics	<ul style="list-style-type: none"> • Identify areas to expand mutually beneficial trade and investment. • Foster an infrastructure development and financing initiative to meet the needs of Brazil and other partner countries similarly situated.
Technology	<ul style="list-style-type: none"> • Attempt to reintegrate Brazil into the fold of Western semiconductor supply chains, though accommodative and coercive measures.
Common Global Challenges	<ul style="list-style-type: none"> • Support Brazilian-led multilateral initiatives through closer diplomatic cooperation. • Solicit Brazil’s assistance in shaping the global framework on issues of shared concern, such as climate change and global health.

China

Sector	Recommendations
Security	<ul style="list-style-type: none"> • Enhance military-to-military ties through joint training exercises. • Explore the possibility of the sale of weapons platforms and systems.
Economics	<ul style="list-style-type: none"> • Invest in Brazil’s natural resource extraction capabilities. • Persuade Brazil to join the Belt and Road Initiative. • Enhance trade denominated in Chinese renminbi.
Technology	<ul style="list-style-type: none"> • Incentivize Chinese technological entities to establish manufacturing facilities and supply chains in Brazil, with a particular focus on electric vehicles and lithium battery production. • Strengthen cooperation in securitized technologies like 5G and semiconductors to ensure Brazil's participation in China-led technological standards and frameworks.
Common Global Challenges	<ul style="list-style-type: none"> • Support Brazilian-led multilateral initiatives. • Invite closer collaboration on issues of shared concern such as climate change and global health.

South Africa

South Africa's Observed Trends

South Africa leans towards China as its preferred partner. As seen in the table below, South Africa has strong alignment with China across all sectors of the competition based on the metrics used in this report. Nonetheless, there remain a sub-sector of competition, arms sale, where South Africa demonstrates closer cooperation with the U.S., and several sub-sectors where Pretoria keeps equidistance with both Washington and Beijing, such as military alliances, space cooperation and health.

Color Code		USA	=	CHN	SOUTH AFRICA	
SECTOR METRICS		TREND	SECTOR TREND			
SECURITY	Diplomacy Arms Sales Exercises, Bases Military Alliances		CHN ≥ USA			
ECONOMY	Trade Investment Sanction Alignment De-dollarization		CHN > USA			
TECHNOLOGY	Securitized Non-securitized Space		CHN > USA			
GLOBAL CHALLENGES	Int'l/Reg Org Climate Change Health Human Rights		CHN ≥ USA			
OVERALL TREND		CHN > USA				
under managed decline						

South Africa’s Forward-Looking Interests

Sector	Interests
Security	<ul style="list-style-type: none"> • Maintenance of its autonomy as an arms exporter. • Enhancement of trilateral cooperation with China and Russia.
Economics	<ul style="list-style-type: none"> • Reduction of trade dependency on China. • Retention of its position in the U.S.-led initiative(s) in Africa. • Maintenance of good economic relations with the U.S.
Technology	<ul style="list-style-type: none"> • Pursuit of Fourth Industrial Revolution, especially in digital infrastructure.
Common Global Challenges	<ul style="list-style-type: none"> • Autonomy to multi-align on specific areas of climate change and health.

South Africa’s Future Policy Projections

Security: South Africa will continue to engage in bilateral and multilateral cooperation with both China and Russia, amidst the rising tension in its relationship with the U.S.. On the other hand, it will explore all options short of a formal military alliance in order to minimize Washington’s punishment.

Economics: South Africa will continue to engage in trading with China. It will also attempt to rectify its trade and loan dependency on China. Thus, it will try to continue benefiting from existing economic ties with Washington.

Technology: South Africa will continue to engage in a technological relationship with China to receive foreign investment and advanced technologies, regardless of U.S.’s view on securitized technologies. At the same time, it will also enhance its cooperation with both China and the U.S. on non-securitized technologies and space collaboration.

Global Common Challenges: South Africa will continue to closely collaborate with both the U.S. and China. So far, there has yet been Washington’s punishment in this sector due to Pretoria’s clear alignment towards Beijing. Meanwhile China has been supporting South Africa’s presence in its China-led initiatives.

Future Policy towards South Africa: how to better meet its Medium-Term Interests?

United States

Sector	Recommendations
Security	<ul style="list-style-type: none"> • Offer more minilateral defense cooperation and peacekeeping training opportunities with other African countries. • Offer exchanges of assistance and expertise in counterterrorism and maritime security.
Economics	<ul style="list-style-type: none"> • Negotiate to reinstate South Africa’s eligibility in AGOA. • Negotiate to reduce, eventually towards elimination, existing tariffs. • Create more favorable loan conditions to South Africa, bilaterally and through international banks • Incentivize the private sector of the U.S. and allies to enhance investment in South Africa. • Offer favorable trade to reduce South Africa’s reliance on Russia/favorable conditions to reduce impact on South Africa if Pretoria obliges the sanctions against Russia.
Technology	<ul style="list-style-type: none"> • Enhance bilateral cooperation through ambitious co-development and joint production ventures. • Incentivize U.S. and allied entities to enhance technological collaborations in non securitized and space technologies in South Africa.
Common Global Challenges	<ul style="list-style-type: none"> • Support South Africa through financial support and knowledge transfer • Build and engage South Africa’s leadership in minilateral and U.S.-led initiatives in areas of common interests, such as green energy transition and health.

China

Sector	Recommendations
Security	<ul style="list-style-type: none"> • Continue bilateral and trilateral military exercises with South Africa, with participation of Russia. • Continue funding/aid to expand Pretoria’s military bases that hold strategic importance. • Explore joint economic securitization efforts and contingency plans that involve shipping routes around the Cape.
Economics	<ul style="list-style-type: none"> • Continue trade through bilateral and multilateral channels. • Create more favorable loan deals to decrease suspicions on loan terms.
Technology	<ul style="list-style-type: none"> • Encourage collaboration in, production of and transfer of all advanced technologies.
Common Global Challenges	<ul style="list-style-type: none"> • Support South Africa through financial support and knowledge transfer. • Strengthen South Africa’s role in China-led initiatives and other multilateral initiatives in the region. • Support South Africa’s future initiatives and in other existing multilateral initiatives in the region.

Sudden Breakdown of U.S.-China Relations

Compared with managed decline, a breakdown in U.S.-China relations has several different impacts on the maneuvering room of pivot states. Under managed decline, pivot states have more time to navigate the unfolding situation and to re-formulate their policy choices accordingly. Pivot states have opportunities to adjust for their multi-alignment across and within different sectors to secure. In contrast, under a sudden breakdown of U.S.-China relations, pivot states will have little time to reconsider their policy choices. It means that there are more constraints on pivot states to fully utilize their maneuvering room to multi-align. The effects of the breakdown in U.S.-China relations on each pivot state will depend on (1) where the triggering event happens, (2) which great power triggers the said event, and (3) its current alignment trend.

For India, if the triggering event happens in its immediate area, we would expect it to align itself with the United States, particularly if the breakdown is triggered by Chinese military expansionism and aggression. On the other hand, if it is a strong action from Washington (but not as a reaction to China), it is expected that India will try to distance itself from the former but it will restrain from aligning with Beijing due to unresolved mistrust between the two. Taking advantage of its regional leadership position, it might attempt to broker peace between Washington and Beijing.

However, if the triggering event is in other regions, India is expected to take a more balanced approach. It may display a mild pivot towards the U.S. if the act of aggression comes from China, though the pivot will be less pronounced under a secondary theater contingency than a primary theater contingency. Diplomatically, India might send a strongly worded message to China but there will be little concrete action, especially when India and China maintain cooperation in some sectors.

For other pivot states, it is likely that the triggering event that pushes towards unitary alignment will stem from the primary theater, regardless of the initiator. This means that, while the maneuvering space for these pivot states will be more heavily restricted than under managed decline, these pivot states will likely retain more maneuvering space relative to India. It also means that they can have better chances in multi-alignment in specific sectors.

For Saudi Arabia and Brazil, in terms of security, there will not be a drastic change in which side these pivot states will pivot to. However, in the field of economics, both will face bigger challenges in expanding their relations with China. This will challenge national interests in economic diversification and will likely have spillover effects in other sectors. If the current trend indicates anything, the restrictions on U.S. technology partnerships with Saudi Arabia and/or Brazil will depend on how the latter will define relations with China. Issue-base alignment will be challenged, even in the global challenges sector where Saudi Arabia and Brazil have successfully maintained equidistance thus far. Two consequences may follow: Saudi Arabia and/or Brazil might be viewed as an unfaithful partner, only going wherever it benefits them. As a result, the great power they side against may withdraw financial, technical, and diplomatic support for the pivot state's regional initiatives.

For South Africa, due to its clear alignment with China, we would expect it to align itself with China, particularly if the breakdown is triggered by the U.S. On the other hand, if it is due to Chinese military expansionism and aggression, South Africa may try to distance itself from the PRC in terms of optics but will restrain from re-alignment with Washington. South Africa will arguably be the most affected by a breakdown in relations, as this could hinder South Africa's ability to modernize its economy and compete globally. It is thus speculated that South Africa could shift completely under the influence of China.

Conclusion

SUMMARY OF FINDINGS & IMPLICATIONS

STUDY LIMITATIONS | RECOMMENDATIONS TO EURASIA GROUP

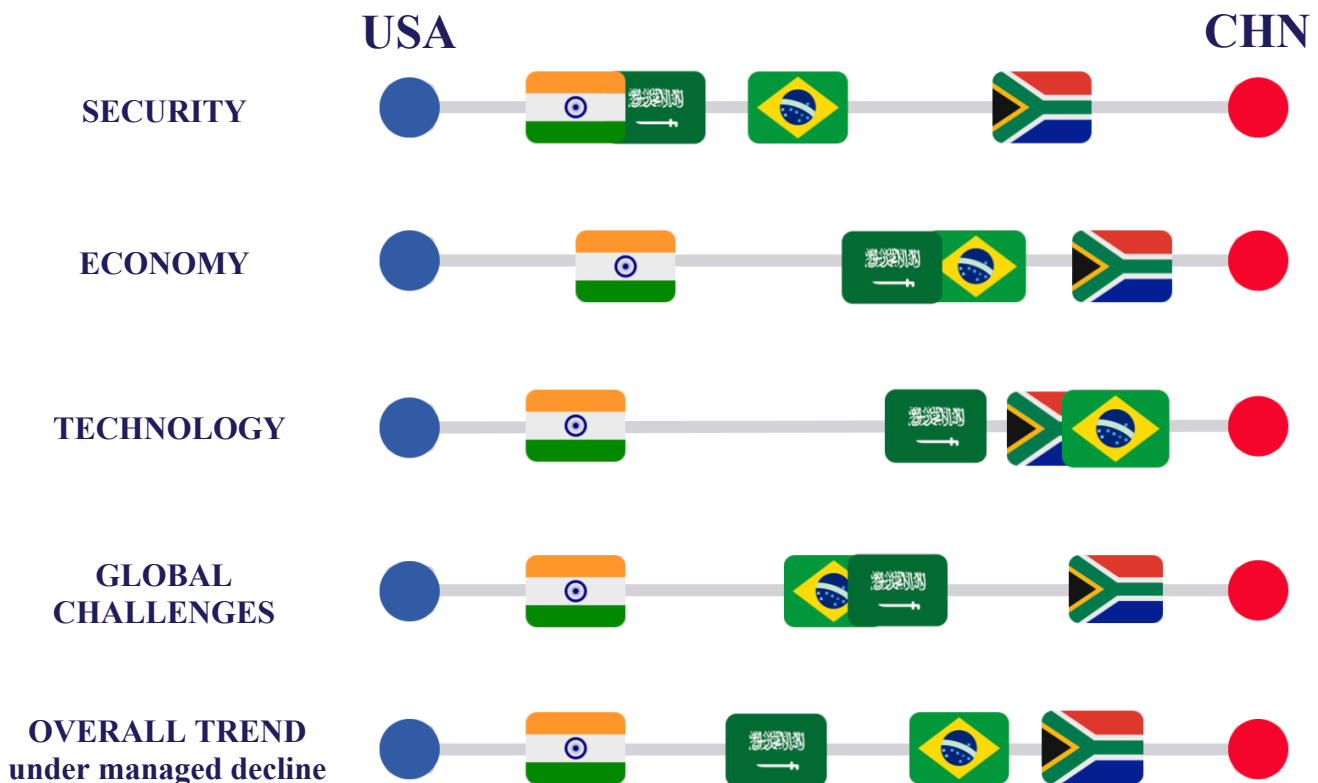


Summary of Findings & Implications

The rise of China has challenged the United States' dominance in international affairs, introducing a competitive dynamic. This shift has created opportunities for states to realign based on specific issues across four sectors: security, economics, technology, and global challenges.

Currently, all our pivot states engage with both powers through issue-based partnerships, as seen in the figure below. They leverage their strategic position to remain relevant in the competition, cooperating with either power in sectors where it aligns with their interests. Currently, this strategic interaction enhances their autonomy amidst the rivalry. Our findings indicate that over the 2008-2023 competition phase, India aligns closest with the U.S., largely due to concerns over China's ascent and overlapping sphere of influence. The Kingdom of Saudi Arabia leans towards the U.S. for its significant security needs but engages heavily with Beijing on economic and technological fronts, showing a nuanced issue-based approach. Conversely, Brazil appears closer to China, particularly in economics and technology, while still relying on the U.S. for security needs and maintaining a balanced stance on global challenges and diplomacy. South Africa shows the strongest ties with China, especially in economics and technology and increasingly in security.

2023 Snapshot



Disaggregating the alignments of these pivot states by sectors, we have identified the following trends:

In terms of security, India, Saudi Arabia and Brazil have moderate to strong alignment with the U.S. currently. South Africa is the only country that has moderate alignment with China. This overall conclusion is consistent with the current observation that Washington still retains relative dominance in the international security landscape. On the other hand, with the current shift of South Africa toward China, it could be seen that the latter has the potential to provide alternative security offerings to the pivot states, particularly in the realms of maritime security and domestic policing. Regarding linkage politics, the regional threat environment will be most important for determining the U.S.' ability to force pivot states into cross-sectoral unitary alignment by leveraging its power as a security guarantor.

In terms of economics, Saudi Arabia, Brazil, and South Africa have moderate to strong alignment with China currently. New Delhi is the only country that has a strong alignment with Washington. This overall conclusion is consistent with the current observation of Beijing's rising economic prowess, coinciding with the steady decline of Washington. On the other hand, India's alignment with the U.S. is not surprising given the strategic competition it currently has with China in the Indo-Pacific region.

In terms of technology, Saudi Arabia, Brazil, and South Africa have moderate to strong alignment with China currently. New Delhi is the only country that has a strong alignment with Washington. This overall conclusion is consistent with the current observation of Beijing's rise in technological know-how, which is critical to these pivot states to diversify and encourage economic growth. Generally, the above three countries do not heavily hold Washington's objection to cooperating with Beijing in securitized technologies into their strategic consideration. India, once again, is the only exception. This is consistent with the strategic competition it currently has with China in the Indo-Pacific region.

In terms of common global challenges, India and Saudi Arabia have moderate to strong alignment with the U.S. currently. Meanwhile, Brazil has neutral alignment with both great powers. South Africa has moderate alignment with China. Compared to other sectors, common global challenges is the only sector that shows a diversification of alignment. This can be explained by the fact that as developing countries facing issues that require cooperative efforts, the pivot states tend to seek assistance and cooperation from both great powers. The only sub-sector that shows clear alignment is human rights issues, given it is tightly related to regime stability in these pivot states. India and South Africa have a more definite alignment mainly due to their strategic competition with either great power and subsequently how great powers have been supportive of their leadership in the regions.

In conclusion, we can have three key takeaways from the above observations: (i) pivot states exhibit a nuanced approach to aligning their relationships with the U.S. and China; (ii) their multi-alignment approaches are dictated by how strong they consider their security and/or economics partnership with either great powers, as evident in India and South Africa; and (iii) the interlinkages between sectors are most apparent when pivot states have clear alignment with either great powers.

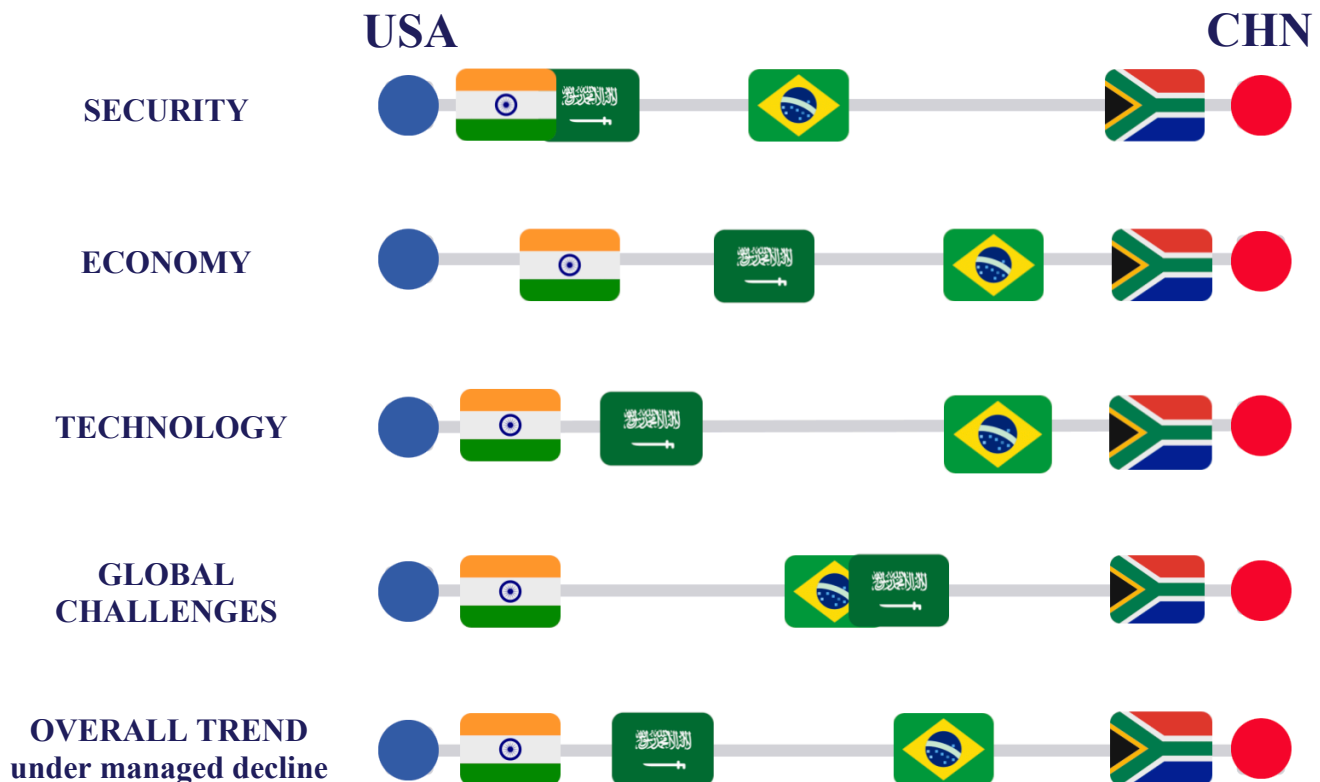
Looking ahead five to seven years, the recent trends are likely to persist as long as the U.S.-China relationship continues its managed decline. Given the strategic importance of these states, both powers are expected to offer greater incentives to sway them further in non-securitized issues; at the same time in heavily securitized issues, great powers are expected to force pivot states to explicitly choose their alignment.

We predict in the medium-term future that, under managed decline, the pivot states' interests will remain relatively the same. Specifically, in terms of security, pivot states will mainly prefer to prevent themselves from being entangled with complex alliance systems. These states will attempt to do so by exploring joint military exercises and weapons sales negotiations with both countries. In terms of economics, pivot states will concentrate on trade diversification to avoid dependency on either great powers. In terms of technology, pivot states will focus on having more access to advanced technology, most often without heavy consideration of either great powers' opinions. In terms of common global challenges, pivot states will continue maintaining their equidistance in terms of collaboration with great powers. Pivot states will also try to gain more support from great powers in their endeavors in becoming leaders in their respective regions.

Overall, we predict that the pivot states will gravitate closer towards the U.S. and China as poles. Specifically, India and South Africa move closer towards unitary alignment with the U.S. and China, respectively. Saudi Arabia and Brazil will have milder shifts closer to the poles in all four sectors, despite trying to maintain their equidistance. Global challenges will be the only sector where these two states manage to stay somewhat in the middle of the alignment spectrum. In other words, we predict that in the next 5-7 years, the pivot states will have shifts more in line with the bipolar alignment structure.

Given these interests, we have outlined recommendations for pivot states and as well as for the U.S. and China. These recommendations are in accordance with pivot states' interests as well as the current trajectory of relations between pivot states and either great power. The recommendations are also divided into four sectors of analysis.

5-7 Year Projections



Breakdown in the U.S.-China relations will push great powers to force pivot states to explicitly choose their alignment, narrowing the maneuvering space of the pivot states in all four sectors of analysis. However, the extent to which pivot states will choose will depend on two factors: (i) the location of the triggering event that causes the breakdown in great powers' relations; (ii) what great power triggers the said event; and (iii) the current trend of alignment itself. Overall, it is predicted that India will remain in a strong alignment with the U.S., except in situations in which Washington triggers a crisis. South Africa will remain in a strong alignment with China, except in situations in which Beijing triggers a crisis. Saudi Arabia and Brazil are predicted to not have any drastic changes in their alignment with either great power.

Study Limitations

Addressing limitations is essential to ensure the integrity and reliability of the study findings. One notable limitation is the qualitative nature of the analysis, which is rooted in available data but primarily relies on analytical and qualitative methods. This approach, while valuable for providing insights and understanding broader trends, may not capture all nuances and intricacies present in the data.

Furthermore, the study's breadth, encompassing four case-studies across four sectors, poses a challenge in terms of depth of analysis. Due to the comprehensive scope, it was not feasible to delve deeply into each case and sector, potentially leading to oversimplification or overlooking of certain factors.

A significant constraint encountered during the study was the limitation in accessing relevant data. Particularly, there was a lack of up to date data and transparency in bilateral agreements, deals, loan terms, and classified government documents. This restricted our ability to fully comprehend the dynamics at play and may have introduced biases or gaps in our analysis. Without access to comprehensive and detailed information, our understanding of the interactions between parties involved may be incomplete or skewed.

Finally, our 5-7 year projection would benefit from the addition of interval estimates to show a range of possible outcomes. Point estimates, like the ones we developed, are fairly arbitrary, whereas interval estimates would offer a better sense of the outer bounds on pivot states' future maneuvering room. Further research could build on the findings of this report and use the structural vulnerabilities identified herein to create interval estimates of future pivoting behavior.

Despite these limitations, efforts were made to mitigate potential biases and ensure the validity of the findings. However, it is important for future research to address these limitations by seeking to obtain more comprehensive and transparent data sources, as well as considering alternative methodologies to enhance the depth and rigor of the analysis.

Recommendations to Eurasia Group

Given the findings and limitations of our report, it is recommended that the Eurasia Group should consider the following recommendations:

1. Create indicators and warning signs of breakdown in great power relations.
2. Define the thresholds for breakdown in relations, sans kinetic war.
3. Track the alignment patterns of pivot states amongst each other, with particular attention paid to collective action against either great power.
4. Track changes in leadership within countries – especially in the U.S., China, and the pivot states – that could potentially affect all trends.
5. Watch for more dual-use investments and access deals by China and the U.S. in pivot states, such as the recent port agreements seen in South Africa and India. This is an interesting development that may implicitly signal the security direction that the country leans towards.
6. Build interval estimates of future pivoting behavior based on the pivot states' interests and vulnerabilities to better anticipate a range of possible outcomes.
7. Monitor the behavior of Russia in tandem with China.
8. Develop frameworks for systematically addressing the role of the private sector in both (a) shaping great power relationships with the pivot states, and (b) facilitating managed decline, detente, and/or breakdown in great power relations.

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