Background Research Volume

Gates Forum IV

Strengthening U.S. Security Assistance

Conference Reference Materials

October 2025

Robert M. Gates Global Policy Center

W&M GLOBAL RESEARCH INSTITUTE

Robert M. Gates
Global Policy Center

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First and foremost, on behalf of Secretary Gates, we want to thank you for attending the Fourth Gates Forum (GF4) at William & Mary (W&M) on Security Assistance. The intent of GF4 is to answer a single overarching question: In an era of intensifying competition with major powers and non-state threats, what concrete actions can the United States take to redevelop its security assistance and make this vital tool of statecraft more effective?

Working together, GF conferees will address this challenge that is so vital to our national interest. The intent of GF4 is to discuss and prepare the GGPC to develop recommendations for action that will find broad support to the Administration and bipartisan support in Congress.

In partnership with W&M's Global Research Institute (GRI), the attached research package consists of a Research Synthesis Report: "Strengthening U.S. Security Assistance" that details insights from the following nine research papers provided:

"**U.S. Security Assistance: A History Retrospective,**" by Renanah Joyce, PhD, Assistant Professor, Walsh School of Foreign Service and Center for Security Studies, Georgetown University

"**Supplying and Sustaining Security Assistance in Wartime; Contested Logistics in the Indo-Pacific and Fighting with Allies and Partners**," by Rosella Cappella Zielinski, PhD, Associate Professor of Political Science, Boston University and Ryan Grauer, PhD, Associate Professor of International Affairs, Graduate School of Public and International Affairs, University of Pittsburgh

"**The Changing Face of China's Security Cooperation: Implications for U.S. Security Force Assistance Programs**," by Sheena Chestnut Greitens, PhD, Associate Professor, Lyndon B. Johnson School of Public Affairs, University of Texas at Austin

"**Russian Security Assistance in Great Power Competition**," by Jack Watling, PhD, Senior Research Fellow for Land Warfare, Royal United Services Institute

"**Navigating a Competitive Marketplace: U.S. Security Assistance in the Global South**," by Samantha Custer, Catherine M. Kelleher Fellow in Cooperative Security, University of Maryland School of Public Policy

"**Understudied But Growing: Chinese Military and Security Cooperation in Africa**," by Paul Nantulya, Research Associate, Africa Center for Strategic Studies, National Defense University

"**From Guns to Governance: The Evolution and Future of U.S. Security Assistance in Latin America - Colombia Case Study**," by Albert "Jim" Marckwardt, PhD, Professor of Strategy and Defense Policy, Inter-American Defense College; Program Administrator, Adjunct Professor, Faculty Co-Lead: The Americas Focus Area, Johns Hopkins School of Advanced International Studies

P.O. BOX 1257
NEWINGTON, VIRGINIA 22122-1257

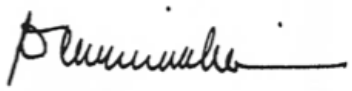
"**From Stabilization to Competition: Adapting the Anti-Fragility Playbook to A New Strategic Challenge**," by Blaise Misztal, Vice President for Policy, Jewish Institute for National Security of America

"**U.S. Security Assistance and the Symphony of Power**," by Stephen Tankel, PhD, Associate Professor, School of International Service, American University; President and CEO, Red Arrow Advisors LLC; Intelligence Officer, U.S. Navy Reserve

Based on the foundation of this high-quality research, at a minimum the Synthesis Report will assist conferee discussion to help the GGP develop recommendations for a final report which will be published in early February 2026. Our hope is at a minimum, you will find time to read the Synthesis Report. We are proud of the quality research that underpins this report, we have provided all the original research papers for those who want to read more.

Secretary Gates, who will lead forum discussions, looks forward to the expertise and contributions of each conferee as you participate, discuss, and help the GGPC develop recommendations for the Final Report.

Very respectfully,



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Gates Forum IV

Strengthening U.S. Security Assistance

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Introduction

The United States has used security assistance—the provision of arms, funding, equipment, services, and advisory and training to other countries—as a means of gaining cooperative and capable allies and partners, fostering stability and peace, and influencing the behavior of friends as well as foes alike. When statecraft and deterrence fail, the U.S. has also employed security assistance to keep wars limited and win them.

Modern U.S. military assistance dates to the Second World War, when the American "arsenal of democracy" proved decisive in the Allied victory. In the Cold War, the reach of U.S. security assistance was dramatically expanded to shore-up vulnerable states, to foster favorable power balances in contested world regions, and thus to contain and keep check on Soviet ambitions and influence. After the Cold War, and particularly since 9/11, U.S. security assistance programs and aims have grown ever-more varied and complex—and also diffuse. Washington has had to focus and refocus its attention on new conflicts and hard-to-crack problems. Through all this, the U.S. has had some successes and learned difficult lessons, but the U.S.'s track record in using security assistance over the last thirty years to advance its foreign interests has been mixed. In the competitions with Russia and China, U.S. security assistance has also been falling short.

Not long ago, the U.S. was the world's dominant exporter of security. But the global security landscape has since become more complex and conflicted, and China and Russia have each developed new capacities and tools of influence to shape security dynamics to their advantage. Chinese and Russian forces train and equip military and police forces around the world, secure critical assets and locales, and conduct peacekeeping, counterinsurgency, and information operations in far-flung places. China's toolkit for shaping external security environments is uniquely formidable. Beijing has joined its security assistance with its economic, technological, and other initiatives to shape external security environments in ways conducive to its world-transformative agenda. In addition to supplying armaments, equipment and training, Chinese state-directed firms are the dominant suppliers of sophisticated surveillance and policing technologies—a new form of hi-tech, autocracy-enabling governance. China's activities are affecting security and developmental trajectories in far-flung places, with adverse consequences for America's security and foreign interests.

Taken together, these new dynamics have strained long-standing U.S. alliances and undercut the appeal of the U.S. as a go-to security partner. In the manufacture of inexpensive armaments and security wares that ruling elites in other countries want, "China Inc." has been outperforming America. In some areas, the U.S. has been outmaneuvered, thus reducing American sanctuaries, strategic leverage and political influence.

The U.S.'s capacities for global engagement and action remain unmatched, but they are not unrivaled, and the U.S. needs urgently to focus and adapt to this new situation. In Washington, the structures and authorities for delivering security assistance to frontline states and unstable ones are out of date. U.S. security assistance is also hampered by bureaucratic sclerosis and poorly coordinated with the U.S. defense industry, our traditional allies, as well as with the U.S.'s other foreign policy instruments. Innovation in and out of government has

occurred, but the U.S. lacks a coherent approach to the world and a national strategy for ensuring that its security assistance creates the outcomes it seeks. Without a clear national direction, the U.S. has been losing position and influence. A failure of U.S. statecraft will be damaging to the U.S.'s security and standing in the world. It also heightens the risks of actual warfare.

American security assistance is therefore at a critical juncture and in need of sustained rethinking and redevelopment. This research volume was prepared for the Fourth Gates Forum on U.S. security assistance. The contributors to this volume have provided topline summaries of their essays which are included here in this integrative report. The authors explore the sources of U.S. security assistance, its track record across presidential administrations, its shifting aims, as well as the new demands, challenges, risks, and opportunities for U.S. security assistance.

The authors in this research volume do not all agree on the future priorities of U.S. security assistance and the new competencies we need to develop. But they all ask foundational questions—above all, what is the U.S. trying to achieve? How can the U.S. enhance the efficacy of its security assistance while limiting unintended consequences? How can the U.S. improve the coordination of its security assistance across the interagency, with the private sector, and with its allies and partners? What actions are required in Congress and the executive branch to remove red tape in Washington and equip our allies and frontline states to fend-off major-power aggressors? In what ways can the U.S. best re-tool its security assistance to foster resilience in vulnerable and contested countries and compete proactively in the hazy struggle with major-power adversaries over the next world order? This integrative summary concludes with some questions and areas for action which Conferees at the Fourth Gates Forum may wish to consider.

The United States and its Allies

Security assistance—an American foreign policy tool of first resort—aims both to build partner capacity and to shape the behavior of friends and foes alike. Security assistance can empower U.S. partners to indirectly or directly support U.S. military operations, and it is also flexible—it can be scaled up or down, turned on or off, and conditioned on recipient performance. **As Dr. Renanah Joyce makes clear in Paper #1,** the U.S.'s goals, authorities, and implementation of security assistance have shifted significantly over time, making it one of Washington's most complex foreign policy instruments.

Modern U.S. security assistance traces back to the Lend-Lease Act of 1941 and was institutionalized through legislation including the 1947 Greek-Turkish Aid Act, the 1949 Mutual Defense Assistance Act, and the 1961 Foreign Assistance Act. During the Cold War, it became a central pillar of America's containment policy, from building the South Korean military to balancing power between Israel and Egypt. The Vietnam War revealed the limits of U.S. security assistance, even while solidifying its status as a substitute for direct U.S. military intervention. After the Cold War, U.S. security assistance adapted to a variety of new missions—counterproliferation, NATO enlargement, peacekeeping, and counternarcotics. After 9/11, it surged again, with Iraq and Afghanistan as cases of large-scale state-building, alongside smaller missions in Yemen, the Philippines, and swathes of Africa. Today, security assistance is central to the competitions with Russia and China, from Ukraine to the Indo-Pacific.

Joyce argues that assessing the success and outcomes of U.S. security assistance across 80 years is a complicated task. History suggests that assistance has worked best when U.S. and partner interests are aligned, objectives are clear, Washington commits to shaping institutions over the long-term—and uses conditions accordingly. Greece in the late 1940s, Poland in the 1990s, and Colombia in the 2000s are all cases where U.S. security assistance bolstered capacity, professionalized militaries, and supported broader U.S. strategic goals. At times, assistance has also advanced diplomatic objectives, sustaining peace agreements (e.g., Israel and Egypt, Greece and Turkey) and embedding U.S. influence through officer education and advisory relationships.

Meanwhile, Joyce argues failures in U.S. security assistance often stem from misaligned interests, weak partner will, and institutional fragility in partner countries—as in Afghanistan and Iraq. Bureaucratic fragmentation in Washington, red tape, and the U.S. military's low prioritization of building and advising foreign militaries compound the challenge. Further, U.S. security assistance can and has backfired, empowering abusive regimes, fueling coups, or ensnaring the U.S. in costly, ineffective relationships. Rival patrons like Russia and China now provide countries alternatives to the U.S., thus reducing American leverage. Success, then, is less about "what's at stake" and more about underlying conditions: partner buy-in, institutional reform, integration with U.S. diplomacy and development, and the U.S.'s long-term delivery and commitment. Security assistance works best as one tool in a broader U.S. strategy, not a substitute for it.

Joyce concludes that U.S. security assistance remains indispensable, but it has increasingly been overburdened. Security assistance has accumulated missions without shedding old ones. In the absence of a single rival like the Soviet Union, or a unifying threat like terrorism, American security assistance operates in an increasingly complex environment. It is now expected to do more in more places—from securing access and bolstering allies against major-power adversaries, to stabilizing fragile states, promoting human rights, and drawing partners away from competitors. In this dynamic context, the U.S. cannot rely on a one-size-fits-all doctrine for security assistance. Instead, the U.S. must embrace complexity, begin with clear purpose, and use security assistance selectively while adhering to first principles: What is the U.S. trying to accomplish? Is security assistance the right tool given the conditions? And if so, how should it work in concert with the U.S.'s other foreign policy instruments?

The unique challenges facing U.S. security assistance in the vast and deeply variegated Indo-Pacific are spotlighted **in Paper #2 by Dr. Rosella Cappella Zielenski and Dr. Ryan Grauer**. Deterring and fighting in combination with other countries, the authors note, is inherently difficult, and the challenges start well before the initiation of hostilities. Deterring, limiting, and winning any potential conventional war in the Indo-Pacific will be complicated, above all, by the contested nature of logistics. To execute combined operations, the resources required to equip and supply the forces raised and trained by different countries need to be procured; the interoperability of logistics equipment, systems, and processes need to be ensured; and logistics efforts along shared lines of communication and at shared distribution nodes need deconfliction. But these tasks can be made ever-more difficult when existing logistics networks are contested and supply lines, transport infrastructure and equipment, and supply depots are subject to kinetic and non-kinetic interdiction by the adversary. The contested nature of logistics introduces distinct difficulties that must be overcome if conflict is to be deterred or won.

Furthermore, Cappella Zielenski and Grauer argue that, in the Indo-Pacific, the United States' and partners' experience, institutions, exercises and information-sharing relating to coalition-wide logistics are primitive, if not entirely absent. Without concerted efforts to develop robust and secure systems and processes to manage large-scale efforts in the face of sophisticated adversaries and contested logistics, prospective U.S. security partners will likely avoid or abandon combined, multi-national operations. This would force the U.S. to not only manage the challenges of contested logistics alone but also forfeit the burden sharing and operational benefits of deterring and fighting with allies and partners. The U.S.'s prospects for prevailing in a conventional war fought in the Indo-Pacific would decline accordingly.

Cappella Zielinski and Grauer argue it is necessary for the U.S. and its Indo-Pacific allies and partners to invest in a combined logistical capacity to ensure all potentially operational partners can move, supply, and sustain forces and equipment in-theatre—even in the face of determined adversarial attempts to forestall such efforts. This requires that the U.S. prepares not only to transport its own troops and equipment to theatre, but also those of allies and partners as necessary; to cross-train allies and partners on American transport equipment; to promote logistical interoperability; and to build-up systems to ensure deconfliction in logistical systems and processes.

Any American-led effort to build robust logistical networks in the Indo-Pacific depends, as Cappella Zielinski and Grauer make clear, on a deep understanding of prospective partner logistical capacities to equip and sustain their forces during potential combined operations. It is necessary then to plan for the effective aggregation of prospective partners' comparative advantages in logistical capacity as they relate to potential combined operations and future scenarios. Plans could then be implemented and refined through officer exchanges, iterated exercises, and institutionalization of logistical systems and processes that would be employed during any future conventional war in the Indo-Pacific. Such efforts could include increased military-to-military contacts among logistical units, building on and increasing both the frequency and complexity of logistics-oriented exercises, and concluding agreements over the pre-positioning of supplies and efforts.

Keeping Check on the U.S.'s Adversaries

The second section of this volume examines what the U.S.'s major-power adversaries have been doing in the security assistance space. **In Paper #3, Dr. Sheena Chestnut Greitens argues** that in an era of great power competition in which China (PRC) is the "pacing challenge," the United States will most effectively deploy security force assistance only if it first understands the changing character of Chinese security cooperation—a rapidly emerging phenomenon that is reshaping the global security environment.

Chestnut Greitens outlines where and how China uses security assistance to pursue its external goals and assesses the comparative advantages that the PRC brings to bear in the security cooperation space. This includes activities that allow the PRC to use a relatively light and non-militarized footprint to bolster its presence, partnerships, and influence abroad. She then outlines the set of choices that China's growing security outreach presents to U.S. policymakers and identifies emerging risks as well as opportunities to improve the U.S.'s ability to succeed in

the strategic competition. Overall, Chestnut Greitens argues the U.S. should not try to symmetrically match the PRC in security assistance at every turn, but rather to identify specific areas where security assistance can best be employed to advance U.S. interests.

Meanwhile, Russia has also significantly enlarged its military involvements with other countries and sub-national units, and it is boxing well above its actual geopolitical weight. As **Jack Watling argues in Paper #4**, Russia's successful expansion of its foreign military relationships is a consequence of the vacuum created by the U.S.'s deliberate disengagement from some theaters, the U.S.'s perceived failures to generate outcomes favorable to partner countries even after long security assistance engagement, as well as Russia's concerted efforts to make a compelling counteroffer to the U.S. Russia has succeeded at inducing some countries to switch security providers by spreading a narrative that the U.S. does not respect the sovereignty of its allies and partners. Once Russia has established a presence it uses a number of methods to cement partner alignment, including the economic isolation of the territory, the political capture of the state's elites, and the use of military sales to build institutional dependence.

To effectively counter Russia, Watling argues the U.S. needs to focus on realistic outcomes rather than process and further to prioritize those countries and areas where the U.S. wishes to compete. The U.S. also needs to make its security assistance far more responsive to the actual needs of its allies and prospective partners. To do this well, Washington will have to better empower its officers in-country—including with a clearer sense of mission. There is, Watling argues, leeway for European and other nations to be more proactive and confrontational in denying Russia access to theaters of operation. Such defensive measures, however, are only likely to succeed if the U.S.'s allies and partners see the U.S. as a reliable security partner. A more "transactional" U.S. approach could prove more effective by incentivizing the U.S.'s allies to invest more heavily in their own defense. But, at present, few states have confidence that the U.S. will adhere to foundational agreements it has made. Staying power is crucial, and Watling argues effective security assistance requires firm diplomacy and strategic foundations.

The Security Assistance Competition in the Global South

The third section of this research volume delves deep into the security assistance competition unfolding in Asia, Africa, the Middle East and Latin America. **Paper #5, written by Samantha Custer**, examines the competitive supply and demand side dynamics of security assistance in the "Global South"—an imperfect shorthand for the incredibly diverse set of roughly 130 low- and middle-income countries with varying political clout, economic prospects, and relationships with the United States. Custer assesses how U.S. security assistance compares with the available alternatives in the Global South. Her paper is organized around four questions: Who are the leading suppliers of security assistance in the Global South? In which markets are these suppliers most competitive—and why? How might the U.S. employ offensive and defensive measures to ensure competitors' efforts do not undercut its influence and interests?

Custer surveys the major security assistance providers and their respective positions in the Global South and also discusses the competitive "demand-side" dynamics shaping security assistance "markets." Global South countries have agency all their own, and Custer's paper includes insights from nine specific cases: Algeria, India, Iraq, Morocco, Myanmar, Pakistan, Serbia, Ukraine, and Vietnam. Custer's analysis places relatively greater weight on arms transfers (e.g., orders serviced, weapons delivered, capability transferred), for which there is

more comprehensive data available. However, Custer stresses that security assistance is about more than arms alone, and a singular focus on these transfers could underestimate the offer of non-traditional players. To the extent possible, Custer therefore integrates insights about less easily observable tools such as technology, training, and joint operations. Overall, Custer concludes that China and Russia are assumed to be indiscriminate suppliers of security assistance in the Global South, as compared with the U.S.; however, the reality is more complex.

The next two papers look at specific case studies in the Global South. **In paper #6, Paul Nantulya** looks closely at China's comprehensive and multi-layered role as a security actor in Africa. China's People's Liberation Army (PLA) operates its first overseas base in Djibouti with myriad benefits, learning lessons for its future basing needs. Professional Military Education has also become a centerpiece of China's engagement, with thousands of African officers enrolled annually in Chinese academies under generous training packages. The Ministry of Public Security has also emerged as a critical actor, training African police, exporting surveillance systems, and promoting Beijing's Global Security Initiative.

Overall, Nantulya describes five distinctive aims and features of Chinese security cooperation in Africa: 1) reinforcing economic and other non-military lines of effort; 2) cementing the party in power regardless of political inclinations; 3) establishing elite access both in democratic and undemocratic settings; 4) embedding Chinese norms and practices to shape African security architectures and policy choices; and 5) challenging U.S. influence. In return, China hopes to: 1) secure sustained African political support for its global ambitions and initiatives; 2) cultivate greater willingness among African countries to support China's interests; 3) position itself as a partner of choice in affordable military hardware, training, education, and technologies; and 4) dissuade African countries from efforts to either isolate China or undermine its global interests.

Nantulya underscores that China has rapidly established itself as a leading supplier of affordable defense equipment, providing 70 percent of African militaries with armored vehicles, UAVs, and other systems. The cases of Algeria and Kenya highlight Beijing's tailored approach to cultivating long-term relationships—including with liberation movements that had longstanding contact with the Chinese Communist Party and the PLA, as well as countries that were once more aligned with Western powers but whose ties to China have grown considerably.

Despite these trends, security assistance allows the U.S. to retain influence in key countries in the Global South—and the U.S. needs to build on this. **In Paper #7, Dr. Jim Marckwardt** looks at U.S. security assistance in Latin America, with a particular focus on the strengths of Plan Colombia. Using that case study, Marckwardt argues that the tool of institutional capacity building (ICB) has evolved from an afterthought into a key pillar of U.S. security cooperation, especially since 2017. Like others in this volume, Marckwardt argues that for ICB to succeed there must be deep strategic alignment between the U.S. and recipient countries. Securing partner buy-in is crucial and requires time, and Marckwardt emphasizes the importance of understanding a partner nation's agents of change and their motivations. He also recommends that ICB programs be well-targeted, with careful attention paid to prioritizing and sequencing efforts to maximize impact. Lastly, Marckwardt recommends the U.S. encourage partner nations to pursue additional institutional reform opportunities, such as those offered by NATO and other aligned implementers, that support and advance shared strategic objectives. He

argues that U.S. policymakers must increase institutional capacity building efforts worldwide, as this is a vital for proving U.S. commitment and in great power competition.

U.S. Security Assistance and the Symphony of Power

If U.S. security assistance is to remain competitive overseas, it must first be made effective at home. **In Paper #9, Dr. Stephen Tankel** argues the U.S. must urgently focus on fixing both bureaucratic sclerosis in Washington as well as the shortcomings in the defense industrial base. To deter major-power aggressors in Europe and Asia, Tankel argues that the U.S. needs to focus on getting the right countries the right armaments and supportive assistance more quickly. This demands major structural reforms, which require policymakers' attention and political capital—two things which are always in short supply. Because of this, Tankel's paper identifies many of the major pain points and proposes a roadmap for fixing them, including specific areas and reforms where the executive and legislative branches can work together. This requires articulating a clear vision for using security assistance, improving alignment across various U.S. assistance programs, and increasing their integration with other instruments of power in pursuit of realistic outcomes. All in all, the U.S. government must innovate and get its own house—including cooperation with the U.S. and allied defense industrial base—in order.

Blaise Misztal argues in Paper #8 that the U.S.'s success in any competition with major-power rivals requires that U.S. security assistance must also not forget the hard-earned lessons learned after 9/11. Those lessons were embedded in the design the 2019 Global Fragility Act (GFA), which called for the creation of new doctrine, structures, processes, and new competencies for conducting cost-effective, long-term stability operations in fragile states. Because the contests with China and Russia are unfolding in areas which are poorly governed, the U.S. must maintain the capacity to work in and with selected fragile states, especially to deliver security assistance to them. The task now, Misztal argues, requires expanding the anti-fragility agenda to strategically consequential countries to foster not just stability but also resiliency against the depredations and unwanted influence of the U.S.'s major-power rivals.

The GFA reflects four main post-9/11 lessons for working with fragile states. First, fragility is a political condition marked by the absence or breakdown of trust between state and society. Second, security assistance is a double-edged sword, both necessary for stability but also often used by fragile regimes against their people. The U.S. must therefore be highly selective in choosing which countries to partner with. Third, the U.S. can't want more for a country than it wants for itself, and any attempt to deal with fragility can only be driven by political leaders and agents of change from fragile countries themselves (ala Plan Colombia.) The U.S. can support those leaders who want to reconstitute their national compacts through long-term partnerships and a comprehensive, cost-effective, country-specific strategy. Doing this successfully, fourth, requires a deep alignment of effort across all of the U.S. government in addressing fragility.

With a significant rethinking now underway of the U.S.'s foreign assistance instruments, and even of the U.S. national security state more generally, Misztal argues now is the time to build the structures within government that can work with fragile states to advance U.S. national security interests. These structures should include an interagency coordination process convened by the National Security Council, a new agency within the Department of Defense/War to

implement security assistance missions, an expanded and elevated planning function within the State Department, and new career tracks for expeditionary personnel to focus on the long-term planning and opportunities analysis required to foster resilience. A National Security Council-convened high-level coordination mechanism should consider proposals to provide security assistance to selected fragile states by weighing their strategic value against the complexities and costs of operating there.

Policy Questions to Consider

Taken together, the contributors to this research volume on U.S. security assistance do not all agree but they raise a number of foundational questions which policymakers should consider. While not an exhaustive list, some of the most salient questions include:

- What are the aims of U.S. security assistance in the twenty-first century?
- How should decision-makers judge when security assistance is the right tool—and how best to combine it with others? What does history tell us about these questions?
- To what extent should the U.S. support the creation of a shared doctrine and administrative bodies to coordinate logistical efforts, logistical command authority, and interoperability with allies and partners—particularly in the Indo-Pacific?
- In what ways is the expansion of Chinese security assistance a threat to U.S. interests? Are there areas in which the U.S. can accept, or welcome, China providing some global or regional public security goods that complement rather than challenge American interests?
- At what point does the quantity China offers in security assistance in the Global South override the quality offered by the U.S.?
- How can the U.S. compete effectively in states where Russia has poisoned the market for Western business and tarnished the human rights record of local partners?
- What unique areas of comparative advantage does the U.S. already have, or could it develop in the future, as part of its security assistance value proposition in the Global South?
- Why is ICB important amidst Great Power competition, and does the Department of War have the capacity and personnel to conduct institutional capacity building efforts in select countries where such actions are likely to work?
- Is U.S. security assistance still vitally relevant if it is directed toward more highly capable partners able to build their capacity through arms purchases? Should the U.S. be shrinking the budget envelope and spending that money on other instruments of national power or using security assistance more to hedge against risk in non-priority theaters?
- Should the U.S. undertake to compete with China in select fragile states?

Policy Options to Consider

This research volume highlights a number of structural and policy "pain points" in how the United States wields security assistance as a tool of statecraft, coordinates efforts with allies,

and coordinates it with other instruments of U.S. national power. As decision-makers consider new paths forward, some policy recommendations from this research volume include:

- ***Start with First Principles.*** Define clear objectives before using assistance: what is the United States is trying to achieve? Is military assistance the right tool? And how can this assistance complement diplomacy, development, and intelligence? (Joyce, et al.)

- ***Get the incentives right—and enforce conditions.*** Apply conditionality selectively and consistently, ensuring partner buy-in and sequencing reforms to absorptive capacity. This can help to minimize misaligned outcomes and incentivize durable reform. (Joyce and Marckwardt/Misztal)

- ***Deliver security assistance with the end in mind: prioritize long-term partner capacity over short-term arms sales to address concerns about U.S. reliability.*** Explore joint ventures and technology transfer incentives to be responsive to the desire of local governments to build their domestic defense industries. Condition future security assistance on demonstrated progress against security sector reforms and strengthening civilian institutions. Incorporate theory and practice in capacity building through blending access to formal professional military education with application through joint operations, training exercises, and other peer-to-peer knowledge exchange.

- ***Cultivate a workforce.*** Develop a professional cadre—*including overseas personnel*—within government to manage and implement security assistance including in fragile states (GFA), sustain continuity, and evaluate outcomes over time. (Marckwardt, Misztal.) The Trump Administration's reorganization of the State Department creates an opportunity to strengthen the security assistance workforce so that Foggy Bottom can execute all the authorities under its control and carry outs its concurrence responsibilities regarding Title 10 military assistance. The Executive Branch should request, and Congress should appropriate funds to seize this opportunity. (Tankel)

- ***Compete smartly—integrate security assistance with U.S. diplomacy, development, and trade policy.*** Conduct a thorough comparative assessment of the competitiveness of America's financing terms for arms purchases across various core programs compared to foreign alternatives. Communicate the lifetime cost-benefit ratio for Chinese, Russian, and American arms, considering not only the initial purchase price but also the hidden costs of ongoing maintenance and early retirement of lesser quality systems. Raise awareness about how China and Russia exploit unseen backdoors in dual-use technologies and vulnerabilities in local governance in ways that undercut partner nations' long-term national security. In regions where Russia and China offer fewer conditions and faster delivery, emphasize historical U.S. advantages: quality, interoperability, professionalism. Spotlight hidden costs of competitor assistance while offering attractive alternatives. (Custer, et al.)

- ***Build a better dashboard.*** Develop an *open source*, comprehensive map of China's security cooperation and other assistance globally, layered alongside existing assessments of PLA military diplomacy and geo-economic activities. This data should be used to

identify U.S. opportunities and risks, and to specify *ex ante* the potential role, purpose, and efficacy of proposed American security and other forms of assistance and exchange. (Chestnut Greitens)

- ***Exercise strategic discipline.*** Separate high-priority potential recipients of Chinese security assistance into two groups: those that are interested for autocratic purposes, and those that are interested due to legitimate gaps in public safety capacity, in order to develop separate plans of action for each group. (Chestnut Greitens)

- ***In the Indo-Pacific, prioritize logistical capacity.*** The U.S. and its allies/partners can gain a shared understanding of respective logistical capacities through multilateral exercises and logistics liaisons at the unit, service, and combatant command level as well as within the Defense Logistics Agency. (Cappella Zielinski and Grauer)

- ***The U.S. needn't match China dollar for dollar.*** Instead, it should leverage its greatest comparative advantages like public- private partnership, communication, technological innovation, alumni engagement, and leadership development. The U.S. has also traditionally been viewed by many African civilian and military professionals as a destination for high quality education and capacity building—something it can leverage as part of a competitive strategy. (Nantulya)

- ***Further to this, the U.S. must increase ICB with select partners.*** As the U.S. calls for increased defense spending and greater burden sharing from its partners, enhanced institutional capacity—even with allies North but also the Global South—is necessary to manage increased responsibilities and military capabilities effectively. ICB is not a one-time program, defense institutions are continually evolving and must adapt to new challenges. Despite its importance, ICB currently represents less than eight percent of overall security cooperation efforts. Expanding ICB will require sustained investment and attention, and increased investment in DoD implementers such as ISG and the Regional Centers for Strategic Studies. (Marckwardt)

- ***Strategic alignment with partners is a condition of success.*** As the Colombia case study demonstrated, when U.S. and partner nation strategic interests are not aligned, as was the case when the U.S. prioritized counternarcotics while Colombia focused on counterterrorism, results tend to be limited. However, when both countries aligned their efforts, outcomes significantly improved. Ensuring strategic alignment is essential not only for ICB program success but also for advancing broader U.S. national interests. (Marckwardt, also Misztal)

- ***Think like a scrappy republic again.*** The U.S. and its allies should simplify and reduce the cost of its defense armaments and material both for its own needs in matching Chinese defense output, and to be competitive in becoming the primary provider of equipment to a broader range of security partners. There is a need to work out how to

empower partners to tackle emerging threats without proliferating high risk systems. (Watling)

- ***Get security assistance authorities and bureaucratic design right.*** The U.S. needs an interagency strategy for security assistance, which Congress could mandate the Executive Branch produce. State and the Defense/War Department should clarify their functional objectives for security assistance and develop coordinated, department-wide planning processes that rationalize their various security assistance programs internally, develop data-informed rubrics to guide decision-making about where to expend resources, and ensure sufficient mechanisms exist to integrate assistance with other instruments. Concurrently, the NSC should develop guidance to drive joint security assistance planning at the strategic level to augment mechanisms at the working level. Congress can encourage this through legislative directives and oversight. (Tankel)

- ***Get the defense industrial base right—deterrence requires mobilization readiness.*** While the U.S. has long used security assistance advance arms sales, the challenges facing the defense industrial base (DIB) require it to more vigorously pursue industrial cooperation with Allies and partners as well. U.S. industry is already pursuing co-development, co-production, licensed production, and co-sustainment efforts. The Biden Administration developed guidance to expand and accelerate these efforts in an intentional manner, prioritizing projects that filled a gap in the U.S. DIB, helped to solve operational problems for the Joint Force, or helped an Ally or partner to develop its industrial base in ways that enhance deterrence or enable it to contribute to U.S. readiness. Security assistance can support these efforts. (Tankel)

- ***Unleash American technological diffusion.*** In keeping with the Trump Administration's recent executive order, the executive branch should consider creating an expedited technology transfer review process for defense exports. One tier should categorize partners based on the level of confidence in them to protect sensitive technologies. The second should categorize systems based on the level of sensitive of their technology. A third tier should categorize systems based on the value that the U.S. ascribes to proliferating them to advance burden sharing by Allies and partners. This would enable the United States to pre-approve certain countries and pre-clear certain technologies for export, noting that in some cases a country may be pre-approved for some technologies but not others. (Tankel)

- ***Meet allies and future partners where they are.*** How do we direct the desire of Global South (and other) militaries away from "big ticket" weapons systems and more toward the day-to-day weapons they actually need. This problem has to be tackled both in Washington (lobbyists, companies, members of Congress) and with recipients.

- ***Embrace complexity and risk.*** The U.S. should better empower its officers in country to plan and execute long-term security assistance campaigns, especially in lower priority theatres where the demands of "irregular" war and the lack of political attention in Washington is likely to otherwise restrict authorities and thereby limit the ability to deliver for the partner. The U.S. should explore how it can better tailor security assistance

to partner needs and develop a country-specific approach to operations, rather than endeavoring to make countries deter and fight like the U.S. would. (Watling, Misztal)

- ***Coordinate with Allies.*** What complementary role can the U.S.'s developed country allies and partners play in support of our security assistance efforts in the Global South? As with development assistance, many have security assistance programs and capacity. How can we tie that to our efforts or, better yet, in places where they have a history, how can we augment their efforts?

Background Research - Paper 1

Gates Forum IV

U.S. Security Assistance: A History Retrospective

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Executive Summary

U.S. security assistance—funding, arms, equipment, training, and services provided to partner states—has become a tool of first resort in American foreign policy. It serves both to build partner capacity and to shape partner behavior. Security assistance can enable partners to indirectly or directly support U.S. combat action and it is flexible: it can be scaled up or down, turned on or off, and conditioned on performance. Yet its goals, authorities, and implementation have expanded over time, making it one of Washington's most complex foreign policy instruments.

Modern U.S. security assistance traces back to the Lend-Lease Act of 1941 and was institutionalized through legislation including the 1947 Greek-Turkish Aid Act, the 1949 Mutual Defense Assistance Act, and the 1961 Foreign Assistance Act. During the Cold War, it became a central pillar of containment, from building the South Korean military to balancing power between Israel and Egypt. The Vietnam War revealed the limits of security assistance, even while solidifying its status as a substitute for direct U.S. intervention. After the Cold War, assistance adapted to new missions—counterproliferation, NATO enlargement, peacekeeping, and counternarcotics. After 9/11, it surged again, with Iraq and Afghanistan as cases of large-scale state-building, alongside smaller missions in Yemen, the Philippines, and swathes of Africa. Today, it is central to competition with Russia and China, from Ukraine to the Indo-Pacific.

Assessing success is complicated—the concept of success itself must be disaggregated. Nonetheless, history suggests that security assistance has worked best when U.S. and partner interests align, objectives are clear, Washington commits to shaping institutions over the long term—and uses conditions as needed. Greece in the late 1940s, Poland in the 1990s, and Colombia in the 2000s are cases where security assistance bolstered capacity, professionalized militaries, and supported broader strategic goals. At times, security assistance has advanced diplomatic outcomes, sustaining peace agreements (e.g., Israel and Egypt, Greece and Turkey) and embedding U.S. influence through officer education and advisory relationships.

Failures often stem from misaligned interests, weak partner will, and institutional fragility—as in Afghanistan and Iraq. Bureaucratic fragmentation, red tape, and the U.S. military's low prioritization of advising compound the challenge. Security assistance can also backfire, empowering abusive regimes, fueling coups, or ensnaring the United States in costly, ineffective relationships. Rival patrons like Russia and China now give partners alternatives, reducing U.S. leverage. Success, then, depends less on where it happens or what is at stake and more on key conditions: partner buy-in, institutional reform, integration with diplomacy and development,

and sustained U.S. commitment. Security assistance works best as part of a broader strategy, not a substitute for it.

U.S. security assistance is indispensable but increasingly overburdened. Security assistance has accumulated missions without shedding old ones. It is asked to deter major powers, stabilize fragile states, reform institutions, promote human rights, and gain access—all at once. In today's complex environment, Washington cannot rely on a one-size-fits-all doctrine. Instead, it must embrace complexity, begin with clear purpose, and employ security assistance selectively while asking: What are we trying to achieve? Is security assistance the right tool? And if so, how should it work in concert with others?

What is Security Assistance?

For the United States, security assistance—funds, arms, equipment, training, and services provided to smaller states—has become a foreign policy "tool of first resort" used both to build partners' security capacity and to influence their behavior. The term is often used inconsistently. U.S. law defines it broadly, while many policy definitions focus narrowly on programs authorized under the Foreign Assistance Act (FAA) of 1961 and the Arms Export Control Act of 1976 ("Title 22 authorities").[2] Security assistance is closely related to security cooperation, a DoD concept encompassing "all activities undertaken by the Department of Defense (DoD) to encourage and enable international partners to work with the United States to achieve strategic objectives."[3] In practice, policymakers, practitioners, and scholars often use these and related terms (e.g., security force assistance, building partner capacity, train and equip) interchangeably, creating a tangle of terminology that complicates evaluation and oversight.[4] Here, I define "security assistance" as all U.S. support to partner security forces intended to build their capacity.

Security assistance can be indirect—enabling partner forces to achieve security objectives without large numbers of U.S. troops on the ground—or serve as a supplement to direct action, as in U.S. combat operations in South Korea, Afghanistan, or Iraq. It is inherently relational, working through partners to advance U.S. goals, and flexible—unlike security guarantees, it (theoretically) can be scaled up or down, turned on or off, or conditioned on partner behavior. This combination of indirectness and flexibility helps to explain its persistent appeal as a policy tool.

The State Department and Department DoD lead security assistance planning and execution. State oversees Title 22 programs, allocates resources (e.g., foreign military financing (FMF) grants or IMET training slots), and implements security assistance in areas such as intelligence, law enforcement, and peacekeeping. DoD handles most implementation, including Title 10 and Title 32 programs, managing arms sales, procurement, training, and advising partner forces. U.S. embassies and Offices of Security Cooperation liaise and coordinate with partners in the field. Congress authorizes and funds programs, sometimes attaching conditions, with the most effective uses of conditionality often coming through congressional action (e.g., the Leahy Laws).

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[2] US Code, Title 22, § 2416; US Code, Title 22, § 2778.

[3] Defense Security Cooperation Agency, *Security Assistance Management Manual (SAMM), Chapter 1: Introduction and Overview*, updated May 2024, https://samm.dsca.mil/chapter/chapter-1.

[4] Congressional Research Service, *US Foreign Aid to Israel*. CRS Report R45091, Washington, DC: Library of Congress, November 16, 2022, https://www.congress.gov/crs-product/R45091.

Private partners also play a significant role. U.S. firms manufacture and sell arms, equipment, and services, while contractors often implement security assistance, augmenting or replacing U.S. government personnel. Several major army-building projects in recent decades (e.g., Liberia and Bosnia) were outsourced to private firms.[5] Allies and international organizations also provide security assistance alongside Washington, and many early recipients of U.S. security assistance now partner with the United States to export it to others.

Origins and Development Over Time

The United States' experience with security assistance began as a recipient: France and Spain provided material support during the Revolutionary War.[6] Within two decades of independence, Congress authorized the export of "arms, cannon and military stores"[7] (Act of March 3, 1795). However, with a few exceptions—notably, security assistance to Nicaragua, the Dominican Republic, and Haiti, as well as limited support to anti-Bolshevik forces in Russia's civil war—such transfers were rare until World War II.[8] The modern U.S. security assistance enterprise is generally traced to the Lend-Lease Act of 1941, which sent huge amounts of trucks, tanks, munitions, and supplies to the UK, Soviet Union, China, and other allies. "We must get these weapons to [the people of Europe], get them to them in sufficient volume and quickly enough, so that we and our children will be saved the agony and suffering of war," President Franklin Delano Roosevelt declared. "We must be the great arsenal of democracy."[9]

This large-scale aid helped shape the postwar order. Western Europe lay in ruins, the Soviet Union was advancing in Eastern Europe, and Greece, Turkey, and China were battling communist insurgencies. In 1947, Britain suddenly announced it could no longer support Greece

[5] Sean McFate, "Outsourcing the Making of Militaries: Dyncorp International as Sovereign Agent," *Review of African Political Economy* 35, no. 118 (2008): 645–54; Paul D. Miller, *Lessons from America's Post-9/11 Wars*, Strategic Perspectives 15, Washington, DC: National Defense University Press, February 2016, https://inss.ndu.edu/Portals/68/Documents/stratperspective/inss/Strategic-Perspectives-15.pdf.
[6] Larrie D. Ferreiro, *Brothers at Arms: American Independence and the Men of France & Spain Who Saved It*, First edition, New York: Alfred A. Knopf, 2016.
[7] The Act of March 3, 1795 (ch. 53, 1 Stat. 444 (1795)).
[8] See for example Alan McPherson, *A Short History of U.S Interventions in Latin America and the Caribbean*, 1st ed. Chichester, England: Wiley-Blackwell, 2016.
[9] Franklin D. Roosevelt, "Fireside Chat 16: On the Arsenal of Democracy," *Miller Center*, University of Virginia, December 29, 1940, https://millercenter.org/the-presidency/presidential-speeches/december-29-1940-fireside-chat-16-arsenal-democracy.

and Turkey,[10] prompting President Harry Truman to urge Congress to fill the gap as a bulwark against communism. "The free peoples of the world look to us for support in maintaining their freedoms," he said.[11] The Greek-Turkish Aid Act of 1947 allocated $400 million in military and economic aid and dispatched military advisory groups to both countries.[12] Cold War security assistance had begun.

As containment expanded, so did the demand for security assistance and the need for a more permanent legal and bureaucratic framework. Between the late 1940s and 1950s, the United States signed at least 10 major defense or collective security treaties, including the North Atlantic Treaty of 1949 establishing the North Atlantic Treaty Organization (NATO). The Mutual Defense Assistance Act of 1949 created the first comprehensive framework for security assistance to allies and partners in Europe, Asia, and the Middle East, implemented through the Military Assistance Program.[13] Later, the Mutual Security Act of 1951 enabled multi-year appropriations and planning and the Foreign Assistance Act of 1961 established enduring programs such as IMET.[14]

Security assistance became a pillar of U.S. Cold War strategy, central to crisis management and geopolitical influence. The outbreak of the Korean War in 1950 spurred major investments in South Korea and East Asia, including training the South Korean military, rearming Japan's Self-Defense Forces, and building Taiwanese defenses against mainland China.[15] Beginning in the late 1940s, the United States set up Military Assistance Advisory Groups (MAAGs) to manage security assistance, beginning in Korea, Iran, and Greece, among others. They soon spread worldwide as vehicles for advising, training, and equipping partners, before most were folded into unified commands or defense attaché offices by the 1970s (though a few, like those in the Philippines and Thailand, remain today).

Cold War partners' military capabilities varied widely. Some, like South Korea, had to be built from the ground up, while others were stronger but still benefited from U.S. support—whether through base-access deals, as in Spain, or deterrence against the Soviet Union, as in West

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[10] Robert B. Zoellick, *America in the World: A Definitive History of U.S. Diplomacy and Foreign Policy*. First edition. New York, NY: Twelve, Hachette Book Group, an imprint of Grand Central Publishing, 2020.
[11] Harry S. Truman, "Truman Doctrine," *Miller Center*, University of Virginia, March 12, 1947, https://millercenter.org/the-presidency/presidential-speeches/march-12-1947-truman-doctrine.
[12] Public Law 80-75.
[13] Mutual Defense Assistance Act of 1949. Public Law 81-329, 81st Cong., 1st sess., October 6, 1949.
[14] Mutual Security Act, Pub. L. No. 82-165, 65 Stat. 373, 1951; Foreign Assistance Act, Pub. L. No. 87-195, 75 Stat. 424, 1961.
[15] C. Alphonso Smith, "Military Assistance in the Far East", *Proceedings*. December 1960. Volume 86/12/694.

Germany—though major allies like the UK and France relied far less on American security assistance. Washington often pressed these allies to provide their own assistance, particularly in nonaligned countries that were battlegrounds for influence. For example, when China sent its first overseas military training mission to Tanzania in 1965, the United States persuaded Canada to deploy its own advisors in an ultimately unsuccessful bid to keep the Chinese out.[16]

The Vietnam War marked a high point in U.S. security assistance, with U.S. strategy hinging on building capable South Vietnamese forces. Despite massive investment, the U.S.-built military collapsed in 1975. This failure prompted some soul-searching and reforms, notably a shift from direct grant aid to foreign military sales (FMS) and FMF loans. Arms sales became increasingly important in the 1960s and 1970s, particularly under Secretary of Defense Robert McNamara, who viewed sales as a means to address the trade deficit.[17] Despite Vietnam's failure, security assistance retained appeal as a substitute for major U.S. intervention—the basis for the Nixon Doctrine.[18]

The Carter administration tied security assistance to human rights and political reform—criteria later presidents sought to undo but never fully escaped. By the 1980s, under President Reagan, security assistance again surged, supporting anti-communist forces worldwide from El Salvador's civil war to anti-Soviet mujahideen fighters in Afghanistan. Some of the largest commitments of U.S. security assistance aimed to preserve peace by balancing power. After the 1978 Camp David Accords, large amounts of FMF helped maintain peace between Israel and Egypt. Similarly, balanced aid to Greece and Turkey since 1978 has helped to keep the peace between the two NATO members after the Cyprus crisis.[19]

The collapse of the Soviet Union in 1991 removed Cold War-era justifications for security assistance. Congress sought to cut costs and press partners for more. Some programs paused or ended over human rights abuses (e.g., Indonesia) or proliferation (Pakistan). Support for proxies in long-running conflicts like El Salvador's civil war dried up. But the "peace dividend" was short-lived and as new problems rooted in state weakness appeared, so did new programs. The Cooperative Threat Reduction program sought to secure and dismantle weapons of mass

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[16] Renanah Joyce. *Train the World: Security Assistance and Influence in International Relations*. Draft book manuscript; Christopher R. Kilford, *The Other Cold War: Canada's Military Assistance to the Developing World, 1945-1975*. Kingston, Ont: Canadian Defence Academy Press, 2010; Andrew Godefroy, "The Canadian Armed Forces Advisory Training Team Tanzania 1965–1970," *Canadian Military History* 11, no. 3 (2012).

[17] Michael T. Klare, "Political Economy of U.S. Arms Sales," *Social Scientist* 4, no. 11 (1976): 3–19.

[18] Mattias Fibiger, "The Nixon Doctrine and the Making of Authoritarianism in Island Southeast Asia," Diplomatic History 45, no. 5 (2021): 954–82.

[19] Couloumbis, Theodore A. *The United States, Greece, and Turkey: The Troubled Triangle*, Studies of Influence in International Relations, New York, N.Y: Praeger, 1983.

destruction in the former Soviet Union, while other programs provided counternarcotics assistance. The Partnership for Peace program prepared Central and Eastern European militaries to join NATO. Yet other initiatives like the African Crisis Response Initiative trained peacekeeping forces in Africa. The 1990s also saw a major army-building effort in Bosnia to support post-conflict stabilization.

After September 11, 2001, weak states, not strong ones, became the primary source of perceived threats to U.S. interests.[20] Counterterrorism and counterinsurgency rapidly became top priorities, with security assistance central to the U.S.-led wars in Afghanistan and Iraq where the exit strategies hinged on building capable security forces. Over two decades, Washington spent $88 billion and $25 billion training and equipping the Afghan National Security Forces (ANSF) and the Iraqi Security Forces (ISF) respectively. Countries previously cut off from U.S. security assistance were rehabilitated in the name of counterterrorism. Pakistan, which had received almost no security assistance in the late 1990s, received billions in FMF after designation as a "major non-NATO ally" in the war on terror.[21] The new Counterterrorism Fellowship Program allowed DoD to resume cooperation with the Indonesian military, among others.[22]

Authorities and funding mechanisms multiplied. Section 1206 ("Global Train and Equip") allowed DoD to build counterterrorism capacity in countries like Yemen, Kenya, the Philippines, and Indonesia.[23] Security assistance spending reached Cold War-era peaks in real terms. Much of this increase came in DoD authorities and funding, shifting primacy from State to DoD. Multi-year investments expanded to partner countries like Colombia. U.S. allies and partners joined the United States in exporting security assistance. For example, Poland—just a decade after receiving large amounts of U.S. security assistance to join NATO—helped train local forces alongside the United States in Iraq and Afghanistan.[24]

Today, interstate war and renewed geopolitical competition have layered new challenges atop old ones, increasing the complexity of the situation confronting policymakers. Since Russia's annexation of Crimea in 2014 and outbreak of war in 2022, U.S. security assistance to Ukraine

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[20] Robert M. Gates, "Helping Others Defend Themselves," *Foreign Affairs* 89, no. 3 (2010): 2–6.
[21] Susan B. Epstein and K. Alan Kronstadt, "Pakistan: US Foreign Assistance," Congressional Research Service, July 1, 2013, https://www.congress.gov/crs-product/R41856.
[22] Jayshree Bajoria, "U.S.-Indonesian Military Relationship," *Council on Foreign Relations*, November 4, 2008, https://www.cfr.org/backgrounder/us-indonesian-military-relationship.
[23] Defense Security Cooperation Agency, *Section 1206 Global Train and Equip Program*, updated May 2024, https://samm.dsca.mil/program/S1206#S1206.1.
[24] "The End of the Polish Mission in Afghanistan," Ministry of National Defence, June 30, 2021, https://www.gov.pl/web/national-defence/the-end-of-the-polish-mission-in-afghanistan; Christopher Lash, "You Forgot Poland?" *European Security* 34, no. 2 (2025): 273–93.

has grown sharply, totaling nearly $66 billion by early 2025.[25] Efforts to shore up NATO's eastern flank in response to Russian aggression have posed a balancing act with efforts to empower Southeast Asian partners to counter China's maritime advances.

Recent reforms aim to streamline security assistance. The 2017 National Defense Authorization Act consolidated Title 10 authorities to impose order on proliferating programs. The U.S. Army created Security Force Assistance Brigades (SFABs) to institutionalize advising capabilities—originally to build militaries in weak states, later adapted for great power competition. This year's decision to shutter all but two of the SFABs reflects broader debates about the purpose and future of U.S. security assistance.[26]

Successes in U.S. Security Assistance: What Has Worked and How We Know

U.S. policymakers have used security assistance for different purposes across a range of contexts. Often, the goal is for the partner to prevail in armed conflict. Sometimes, it is to build partner capacity—developing forces able to defend their country and deter adversaries. In other cases, the aim is influence rather than battlefield effectiveness, such as keeping the peace between adversaries (e.g., Israel and Egypt) or gaining access and intelligence. Yet other efforts center on improving military behavior. Although rarely the primary goal, Washington often seeks to make partner militaries more respectful of human rights and civilian authority—less out of altruism than from the belief that illiberal militaries breed instability and backlash against U.S. interests.

Given the resources involved, policymakers care about the return on investment. But assessing success is not straightforward: the issue is not just whether a tool "works," but how well it serves specific goals, at what cost, and compared with alternatives.[27] Because security assistance pursues multiple objectives—e.g., imparting warfighting capabilities, institution-building, civilian control, and broader foreign policy aims—success must be disaggregated.[28] Security assistance may deliver at the tactical level yet fail strategically, achieve one aim while missing another, or even produce unintended consequences. For example, U.S. security assistance helped create a capable South Korean military that deterred aggression and supported the country's

[25] "Russian War in Ukraine: Timeline." *Department of Defense,* January 15, 2025. https://www.defense.gov/Spotlights/Support-for-Ukraine/Timeline/
[26] Patty Nieberg, "Army to Eliminate Two Security Force Assistance Brigades, Reassign Experienced Soldiers." *Task and Purpose*, May 13, 2025. https://taskandpurpose.com/news/army-sfab-units-shuttered/.
[27] David A. Baldwin, "Success and Failure in Foreign Policy," *Annual Review of Political Science* 3 (2000): 167-82.
[28] See Tankel, paper #5.

economic rise. But that same military, dissatisfied with progress on the civilian side, seized political power for over three decades—a failure for democracy and liberal values.

Despite such complexities, there are clear examples of security assistance meeting primary objectives at acceptable cost. These success stories differ in geopolitical context, goals, and scale, but share common elements. These cases feature: alignment of partner and U.S. interests, clear U.S. purpose (irrespective of how vital the interest or how large the project), deep involvement in partner military institutions, and a long-term commitment to shaping partner forces—combined with a willingness to condition assistance when necessary.

An early success came in Greece, where U.S. security assistance helped to transform the military into an effective counterinsurgency force. In 1947, with the government on the verge of defeat by communist insurgents, U.S. security assistance initially took a Lend-Lease–style form: materiel deliveries with little oversight. Results were poor. U.S. officers on the ground concluded that effective counterinsurgency would require changes in military leadership, posture, and training.[29] Washington expanded its role, embedding JUSMAPG advisors across all levels of the military. Led by the tenacious General Van Fleet, the advisors dealt with training, equipping, and manning the force—including advocating for appointment of a new commander of the Greek military, an equally tenacious General Alexander Papagos.[30] The United States fed, clothed, armed, and equipped nearly the entire military, and engaged in all aspects of its affairs.[31] By 1949, the insurgency was broken. Within a year, Greece joined the U.S.-led coalition in South Korea and became the fifth largest troop contributor to the war.[32]

Peacetime successes include Poland, one of several Central and Eastern European militaries the United States helped to reform after the Cold War. After the Warsaw Pact's collapse, Polish leaders sought NATO membership and began reforms to establish civilian oversight of the military. Transforming the Polish Armed Forces from a politicized military oriented for offensive operations against the West into a professional one oriented for defensive operations with the West required external help.[33] Initially slow due to NATO divisions over enlargement, U.S. security assistance accelerated through the 1994 Partnership for Peace program that aimed

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[29] Mara E. Karlin, *Building Militaries in Fragile States: Challenges for the United States*, Philadelphia: University of Pennsylvania Press, 2017, 34.
[30] Karlin, *Building Militaries in Fragile States*, 47.
[31] US Department of State, *Foreign Relations of the United States, 1948, The Near East, South Asia, and Africa, Volume IV*, Document 139, https://history.state.gov/historicaldocuments/frus1948v04/d139; Karlin, *Building Militaries in Fragile States*, 61.
[32] United Nations Command, "Greece," *United Nations Command Official Website*. Accessed June 20, 2025. https://www.unc.mil/Organization/Contributors/Greece/.
[33] Dale R. Herspring, "Civil–Military Relations in Post-Communist Poland; Problems in the Transition to a Democratic Polity," Communist and Post-Communist Studies 33, no. 1 (2000): 72, 80-83.

to advance integration without committing to future NATO membership. From 1994-1999, U.S. advisors worked closely with Polish officials to reform doctrine, restructure the general staff, and professionalize the force. Training and education at U.S. institutions like the Army War College helped to socialize officers to Western military norms. Although only about 15% of the force met NATO standards when Poland joined in 1999, the foundation for transformation was in place. As one U.S. official put it: "Our security assistance, bottom line, it worked in a spectacular fashion because the Poles wanted it to work."[34]

The early 2000s, though dominated by failures in Afghanistan and Iraq, also produced lesser-known successes. Plan Colombia, launched in 2000 to counter Revolutionary Armed Forces of Colombia (FARC) insurgents and drug cartels, was a comprehensive security assistance program that combined eradicating plants, training and equipping Colombian forces, doctrinal reform, infrastructure development, and military professionalization along with training on human rights and criminal justice.[35] Between 2000-2015, the United States committed around $10 billion to Plan Colombia, with an emphasis on building Colombia's defense institutions and fighting corruption.[36] The results were dramatic: the FARC was pushed to negotiate, violence declined sharply, and by 2016 a peace accord was reached. Plan Colombia was credited with helping transform Colombia from a failing state into a relatively stable one.[37] Unlike many others, this program was a true whole-of-government effort that assisted Colombia's broader security sector—military, intelligence, and law enforcement. Not only was it praised widely as a model of interagency coordination between State and Defense, but it featured heavy involvement of other departments like Justice, alongside non-governmental partners.[38]

Liberia offers another case. After years of civil war, the government asked the United States to build a new army. Washington reluctantly agreed. The State Department, contracting with DynCorp and PAE, led the 2006-2009 effort, after which recruitment and training shifted to Liberian control.[39] By then, the U.S. military had embraced the mission, launching Operation Onward Liberty (2010-2016) to mentor and advise the force. The program emphasized democratic civilian control and human rights, based on the U.S. belief that the absence of these

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[34] Interview 8.23.24.

[35] "Plan Colombia Progress Report, 1999-2005," National Planning Department and Department of Justice and Security, September 2006. https://colaboracion.dnp.gov.co/CDT/Justicia%20Seguridad%20y%20Gobierno/bal_plan_Col_ingles_final.pdf

[36] June S. Beittel, "Colombia: Background and US Relations" Congressional Research Service, December 16, 2021, https://www.congress.gov/crs-product/R43813.

[37] See Marckwardt, paper #8.

[38] Stuart Lippe, "There Is No Silver Bullet," *Interagency Journal* 5, no. 3 (Fall 2014), https://thesimonscenter.org/wp-content/uploads/2014/09/IAJ-5-3Fall-2014-23-35.pdf

[39] Interview 6.28.17.

norms had fueled the war.[40] To inculcate these values, the program featured over 120 hours of civics training in its five-month training sequence and strict vetting to shape the force's composition. U.S. control of resources allowed it to limit political interference and empower reformers in President Ellen Johnson Sirleaf's administration. The new Armed Forces of Liberia has since supported peaceful political transitions, deployed to peacekeeping missions, and adhered to liberal civil-military relations norms.[41]

Finally, some achievements are diplomatic rather than military. Large-scale U.S. security assistance to Egypt and Jordan, for example, has underpinned their peace with Israel and advanced U.S. regional aims. Other benefits are diffuse and harder to measure. U.S. military training and education programs have reached millions of military trainees worldwide, and the relationships formed with foreign officers are cited as "the longest lasting and most valuable influence" the United States holds—although their precise impact is difficult to quantify.[42]

Obstacles to Success

So far, this essay has emphasized security assistance's successes. This contrasts with much of the academic literature, which is more skeptical. Early studies found that neither the U.S. nor USSR gained much influence from security assistance, and that arms transfers often fueled violence rather than deterring it.[43] Recent work highlights problems of adverse selection and interest misalignment, particularly in counterinsurgency and counterterrorism missions.[44] Other studies point out that for all its rhetorical commitment to liberal values, U.S. security assistance seems

[40] Interview 5.14.21.

[41] Rachel Metz and Renanah Joyce, "Putting the Civilian Back in Civil–Military Relations: How Civilian Leaders Condition the Effects of Security Assistance," *International Studies Quarterly* 69, no. 1 (2025), https://doi.org/10.1093/isq/sqaf002.

[42] For numbers of trainees, see Renanah Miles Joyce, Theodore McLauchlin, and Lee Seymour, "'Train the World': Examining the Logics of US Foreign Military Training," *International Studies Quarterly* 68, no. 2 (2024), https://doi.org/10.1093/isq/sqae044; for the quote, see DSCU 2022, 14-1.

[43] Keith Krause, "Military Statecraft: Power and Influence in Soviet and American Arms Transfer Relationships." *International Studies Quarterly* 35, no. 3 (1991): 313–36; David Kinsella and Herbert K. Tillema, "Arms and Aggression in the Middle East," *Journal of Conflict Resolution* 39, no. 2 (1995): 306–29; John Sislin, "Arms as Influence: The Determinants of Successful Influence," *The Journal of Conflict Resolution* 38, no. 4 (1994): 665–89; Cassady Craft and Joseph P. Smaldone, "The Arms Trade and the Incidence of Political Violence in Sub-Saharan Africa, 1967-97," *Journal of Peace Research* 39, no. 6 (2002): 693–710.

[44] Stephen Tankel, *With Us and against Us: How America's Partners Help and Hinder the War on Terror*, New York: Columbia University Press, 2018; Stephen Biddle, "Building Security Forces & Stabilizing Nations: The Problem of Agency," *Daedalus* 146, no. 4 (2017): 126–38; Walter C. Ladwig III, *The Forgotten Front: Patron-Client Relationships in Counterinsurgency*, New York: Cambridge University Press, 2017.

likely to train coup-makers and human-rights abusers.[45] For every Susilo Bambang Yudhoyono—Indonesia's U.S.-trained general turned reformist president—there is an Abdel Fattah al-Sisi, also U.S.-trained but associated with authoritarianism and abuse in Egypt.

Obstacles to success are both internal and external. Internally, bureaucratic red tape slows delivery of capabilities. Moving funds through Congress, contracting with industry, and transferring equipment can take years. Allies often wait long for promised hardware, as shown recently by urgent Ukrainian requests for arms that have encountered significant delays.

Bureaucratic fragmentation also creates friction. Security assistance activities run by State, DoD, combatant commands, and others are meant to be coordinated by embassy country teams, but often operate in stovepipes (let alone integration with other instruments of statecraft such as economic tools). A defense advisor in Colombia recalled arriving without clear guidance on goals and struggling for weeks to get clarity from the ambassador.[46] These stovepipes can create confusion over goals and complicate evaluation of outcomes.

The military, the actor with the most resources for implementing security assistance, often deprioritizes advising relative to combat missions. Even the U.S. Army Special Forces, created in the 1950s to advise and assist foreign militaries, shifted toward direct-action combat after 9/11. As Rachel Metz notes, the Army has "no bureaucratic incentive" to prioritize advisory effectiveness within the conventional force.[47] Advisors often rotate quickly, lack context or language skills, and receive little preparation. Moreover, because evaluations often measure activities rather than outcomes, it is hard to assess whether or how security assistance activities contribute to policy objectives. This is especially true when effects can take years to emerge, far longer than job performance or budget appropriations cycles.

Even perfect delivery of security assistance, however, is rarely sufficient to produce desired outcomes. Partner will and absorptive capacity are crucial factors affecting success or failure of security assistance. A key insight from over 20 years of U.S. security assistance in Afghanistan and Iraq is that outcomes depend on whether partner leaders want the project to succeed or fail.

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[45] Jesse Dillon Savage and Jonathan D. Caverley. "When Human Capital Threatens the Capitol: Foreign Aid in the Form of Military Training and Coups." *Journal of Peace Research* 54, no. 4 (2017): 542–57.
[46] Author discussion with defense advisor, 2014.
[47] Rachel Tecott Metz, "The Cult of the Persuasive: Why U.S. Security Assistance Fails," *International Security* 47, no. 3 (2023): 89.

In Afghanistan, developing professional security forces was central to the U.S. exit strategy.[48] Between 2002-2021, U.S. and NATO forces attempted to rebuild the Afghan National Security Forces (ANSF) along with the Ministries of Defense and Interior. At their peak, Afghan security forces numbered around 350,000.[49] Presidents Hamid Karzai and Ashraf Ghani supported international training and equipping efforts and feared the Taliban insurgency, but their governments were plagued by endemic corruption, weak legitimacy, and factionalism. Despite Afghanistan's extraordinary dependence on outside support—at one point, 97% of GDP came from international military and donor spending[50]—the United States failed to secure the political reforms needed to build cohesive national institutions. Weak institutional capacity, pervasive corruption, and logistical shortfalls hollowed out the force, contributing to its rapid collapse against the Taliban in 2021. As Stephen Biddle warned in 2014, the problem was "a tacit assumption throughout FM 3-24 that U.S. political interests align with the host's."[51]

Afghanistan highlights another problematic assumption, namely that the training the United States provides fits the partner's needs and environment. U.S. forces trained the Afghan army to look like the American army, with heavy dependence on complex logistics, contractor support, and other capabilities that Afghan forces could not access or sustain without U.S. support. The problem persists, with observers noting that Americans training Ukrainians have failed to adapt U.S. standards to Ukrainian battlefield realities.[52]

Partner leaders, especially in weak states, may even fear that U.S. security assistance will empower rivals or enable coups, and so deliberately undermine improvements to combat effectiveness.[53] In Iraq, the United States spent billions training and equipping an army from scratch. Prime Minister Nouri al-Maliki systematically undermined the U.S.-built ISF through

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[48] Special Inspector General for Afghanistan Reconstruction (SIGAR), *Reconstructing the Afghan National Defense and Security Forces: Lessons from the U.S. Experience in Afghanistan*, SIGAR 17-62-LL, Washington, DC: SIGAR, September 2017, https://www.sigar.mil/Portals/147/Files/Reports/Lessons-Learned/SIGAR-17-62-LL.pdf.

[49] Conrad C. Crane, "Chapter 4: Raising and Mentoring Security Forces in Afghanistan and Iraq." In *Lessons Encountered: Learning from the Long War*, edited by Richard D. Hooker Jr. and Joseph J. Collins, Washington, DC: National Defense University Press, 2015, https://ndupress.ndu.edu/Media/News/News-Article-View/Article/915950/chapter-4-raising-and-mentoring-security-forces-in-afghanistan-and-iraq/.

[50] Amy Davidson, "What We're Buying in Afghanistan," *The New Yorker*, July 30, 2012, https://www.newyorker.com/news/amy-davidson/what-were-buying-in-afghanistan.

[51] Stephen Biddle, "Afghanistan's Legacy: Emerging Lessons of an Ongoing War," *The Washington Quarterly* 37, no. 2 (2014): 80.

[52] Jahara Matisek and William Reno, "It's Time to Ukrainify US Military Assistance," Modern War Institute, November 10, 2023, https://mwi.westpoint.edu/its-time-to-ukrainify-us-military-assistance/.

[53] On coup-proofing, see Erica De Bruin, *How to Prevent Coups d'État: Counterbalancing and Regime Survival*, Ithaca, NY: Cornell University Press, 2020.

sectarian appointments, politicization, and corruption. The elite Iraqi Special Operations Forces—considered the jewel of U.S. training efforts in Iraq—were specifically targeted to create a loyal tool, earning the nickname "Fedayeen Maliki" (a reference to the notorious Fedayeen Saddam).[54] In 2014, ISF units collapsed against a smaller adversary, exposing the fragility of U.S. efforts. Subsequent U.S. security assistance in the fight against ISIS helped the ISF recover somewhat, but forces remain brittle,[55] infiltrated by elements hostile to the U.S., and dependent on external support.

These challenges persist in lighter-footprint missions. In places like the Sahel, the central problem remains structuring incentives to align interests. One complicating factor is that partners increasingly can turn to rival providers, making it harder for Washington to impose conditions or achieve influence. Countries like Turkey or Saudi Arabia can buy (or threaten to buy) weapons from Russia or China if U.S. security assistance comes with strings attached. The mere availability of alternate patrons can make U.S. leverage weaker – partners may be less inclined to comply with U.S. reform demands if they think they can get support elsewhere.[56] Competition among patrons thus further limits Washington's ability to shape partner behavior.

Preliminary Lessons from History: Purpose and Alignment

Historically, the core purpose of security assistance has been to enhance U.S. security by building partner capabilities and shaping their behavior. Its objectives have shifted over time—from containing communism, to maintaining regional stability, promoting democracy, countering terrorism, and competing with great power rivals. Secondary aims have included securing access and intelligence, supporting the U.S. defense industry, responding to humanitarian crises, and spreading liberal civil-military norms.

Security assistance has long been asked to do many things, not all equally suited to the tool. The Foreign Assistance Act of 1961, for example, coupled military assistance not only with common defense but also economic development and internal security of recipients. In his speech introducing the act, President John F. Kennedy argued that security assistance could "in addition to its military purposes, make a contribution to economic progress."[57]

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[54] Metz and Joyce, "Putting the Civilian Back in Civil-Military Relations."
[55] Linda Robinson, Gian Gentile, C. Michael Arant, and Marek N. Posard, *Rebuilding the Iraqi Security Forces: Past Challenges and Future Vision*, RAND Corporation, 2021, https://www.rand.org/pubs/research_reports/RRA238-1.
[56] See Greitens, paper #3, and Custer, paper #6.
[57] John F. Kennedy, "Special Message to the Congress on Foreign Aid," *John F. Kennedy Presidential Library and Museum*, May 25, 1961, https://www.jfklibrary.org/archives/other-resources/john-f-kennedy-speeches/united-states-congress-special-message-19610525.

One takeaway from the cases is that success does not depend on region, goals, or U.S. stakes (Washington cared more about the outcome in Afghanistan than in Liberia, but its smaller investment in the latter case produced better results). Rather, success depends more on favorable conditions: partner buy-in ("will"), clarity of purpose, shaping institutions, and integration with other tools. Kennedy envisioned security assistance working alongside diplomacy and development. Security assistance works best as a component of a broader strategy: assistance to Greece and Turkey occurred in the context of the Marshall Plan, while assistance to Poland fit within broader political integration with Western Europe and NATO enlargement. And when success requires reshaping partner institutions, longer time frames yield better outcomes.

Alignment with other tools ensures that security assistance supports strategy rather than substitutes for it. Pouring arms into South Vietnam without addressing the Saigon government's legitimacy was a fatal misalignment: security assistance could not compensate for weak political foundations. Considering the broader toolkit—and the relative costs of alternatives—leads to more coherent strategy. Although security assistance is often touted as a relatively low-cost tool, this may only be true compared to direct military action. Diplomacy, development, intelligence, and other tools almost always cost less than security assistance.

Closer integration with diplomacy and development may also help to translate power into influence. The United States often seeks alignment through training and advisory efforts that shape how militaries think and operate. But this only works if the partner's political leaders also support the project. When they do not, securing their support requires structuring *civilian* incentives. Here, diplomatic carrots and sticks may play a vital role.

Yet Washington often seems reluctant to condition its security assistance, perhaps because it fears that transactional conditionality will undermine long-term relationships. Conditions can strain ties, as when the U.S. government canceled the sale of F-16s to Pakistan under Pressler Amendment sanctions in 1990—an act the Pakistanis viewed as "hard evidence of American perfidy," damaging cooperation for years.[58] This example suggests that security assistance is not as flexible as advertised. Taking away assistance that a partner is already receiving can strain relationships, pointing to a tension between security assistance's flexibility and relationality.

Such cases raise hard questions about the value of relationships and what to do when security assistance goals clash with broader strategic or normative objectives. Canceling the sale of F-16s signaled U.S. commitment to nonproliferation, but at the cost of Pakistani support for

[58] C. Christine Fair, "The US-Pakistan F-16 Fiasco," *Foreign Policy*, February 3, 2011. https://foreignpolicy.com/2011/02/03/the-u-s-pakistan-f-16-fiasco/.

counterterrorism operations. At times, the United States has prioritized security outcomes by arming abusive or illegitimate regimes, sacrificing democratic values.

Another takeaway is that effects can take years to appear, even with highly motivated partners. NATO's seven years of security assistance to Ukraine only revealed its full impact after the Russian invasion in 2022. Policymakers and practitioners must reckon with long time horizons in security assistance, even as short-term planning and appropriations cycles and political gridlock in Washington will likely make sustaining efforts even more challenging.

Finally, U.S. security assistance has steadily accumulated new missions without shedding old ones. In the absence of a single rival like the Soviet Union, or a unifying threat like terrorism, security assistance operates in an increasingly complex environment. It is now expected to do more in more places—from securing access and bolstering allies against major-power adversaries, to stabilizing fragile states and drawing partners away from competitors. In this dynamic context, the United States cannot rely on a one-size-fits-all doctrine for security assistance (let alone a comprehensive definition). Instead, it must embrace complexity and reimagine security assistance. Embracing complexity means starting with first principles: What is the United States trying to achieve? Is security assistance the right tool—and if so, how should it be combined with other tools?

Policy Recommendations

- *Start with strategy.* Define clear objectives before deploying security assistance: what the United States is trying to achieve, whether security assistance is the right tool, and how it complements diplomacy, development, and intelligence.
- *Incorporate history and context.* Tailor security assistance to history, aims, partner capabilities, and political interests; devise country-specific plans and avoid one-size-fits-all approaches.
- *Condition and sequence security assistance.* Apply conditionality selectively and consistently, ensuring partner buy-in and sequencing reforms to absorptive capacity. This can help to minimize misaligned outcomes and incentivize durable reform.
- *Cultivate a workforce.* Develop a professional cadre within government to manage and implement security assistance, sustain continuity, and evaluate outcomes over time. Decide whether and how to institutionalize advising in the conventional forces.
- *Disaggregate success*. Match tools to goals: training may be useful for building capacity, for example, while arms may be useful for securing access. Test assumptions about effects to improve return on investment.
- *Compete smartly*. In regions where Russia and China offer fewer conditions and faster delivery, emphasize historical U.S. advantages: quality, interoperability, professionalism. Spotlight hidden costs of competitors' security assistance while offering attractive alternatives.

Questions

- How should decision-makers judge when security assistance is the right tool—and how best to combine it with others?
- Is U.S. security assistance more effective in some areas than others, and how do we compare tools and goals across cases?
- How should U.S. security assistance balance building military capabilities with building institutions, especially where efforts skew sharply toward one or the other?
- Is the United States prepared to commit for the years-long effort needed to reshape institutions? And does visibility at home help or hinder political support?
- How is partner support shaped by U.S. resources? Do resources enable partners to take desired actions or encourage free-riding?
- How can the United States better leverage allies (e.g., NATO in Europe, Australia and Japan in Asia) to lead on security assistance, freeing U.S. capacity for priority missions?
- What is the value proposition of U.S. security assistance in an era of rival patrons offering faster, cheaper, and less conditional alternatives?
- What hidden costs of security assistance—political, reputational, industrial—should policymakers weigh against long-term benefits that may take years to materialize?

Background Research - Paper 2

Gates Forum IV

Supplying and Sustaining Security Assistance in Wartime; Contested Logistics in the Indo-Pacific and Fighting with Allies and Partners

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Executive Summary

Fighting alongside allies and partners in a future conventional war in the Indo-Pacific will be complicated by contested logistics, which introduce distinct difficulties that must be overcome if such a conflict is to be won. Fighting alongside others is inherently difficult, and the challenges start well before the initiation of hostilities. To be able to execute combined operations, the resources required to equip and supply forces raised and trained by different countries need to be procured; the interoperability of logistics equipment, systems, and processes need to be ensured; and logistics efforts along shared lines of communication and at shared distribution nodes need deconfliction. Under conditions of contested logistics—wherein supply lines, transport infrastructure and equipment, and supply depots are subject to kinetic and non-kinetic interdiction by the adversary—the difficulty of the aforementioned tasks increases markedly. Crucially, the United States' and partners' experience, institutions, exercises and information-sharing relating to coalition logistics are primitive, if not entirely absent in the Indo-Pacific. *Without concerted efforts to facilitate development of robust systems and processes to manage such logistical efforts in the face of contested logistics, prospective partners will likely avoid or abandon combined operations. This would cause the United States to not only be forced to manage the challenges of contested logistics alone but also forfeit the burden sharing and operational benefits of fighting with partners.* The prospects for success in a conventional war fought in the Indo-Pacific would decline accordingly.

To increase both its own logistical capacity and the likelihood that the United States will be able to both provide effective security assistance to and fight with partners in a future conventional war in the Indo-Pacific, it is necessary to *invest in a combined logistical capacity to ensure all potential operational partners can move, supply, and sustain forces and equipment in-theatre in the face of adversary attempts to forestall such efforts.* This requires that the United States prepare not only to transport its own troops and equipment to theatre, but also those of allies and partners as necessary; cross-train allies and partners on American transport equipment; promote logistical interoperability; and build up systems to ensure deconfliction in logistical systems and processes.

The basis for undertaking this work depends on *understanding prospective partner logistical capacities to equip and sustain their forces during potential combined operations*. Once such understanding is attained, it is necessary to *plan for the effective aggregation of prospective partners' comparative advantages in logistical capacity as they relate to potential combined operations*. Plans should then be implemented and refined through *officer exchanges, iterated exercises, and institutionalization of logistical systems and processes that would be employed during any future conventional war in the Indo-Pacific.* Such efforts may manifest as increased military-to-military contacts among logistical units, building on and increasing both the frequency and complexity of logistics-oriented exercises, and concluding agreements governing the pre-positioning of supplies and efforts.

Supplying and Sustaining Security Assistance in Wartime: Contested Logistics in the Indo-Pacific and Fighting with Allies and Partners

When considering security assistance, most analysts think in terms of weapons sales or military/police training. However, just as important is the development of robust logistical capacities that are interoperable with those of potential partners. This kind of security assistance is desperately needed in preparation for possible conflict in the Indo-Pacific. Not only are North Atlantic Treaty Organization (NATO) type systems and processes not present in partnerships the United States has fostered with regional actors, but NATO members' experience, institutions, exercises and information-sharing relating to coalition logistics among themselves in Asian theatres of operation are primitive, if not entirely absent. Recreating NATO-style logistics systems in the Indo-Pacific is not feasible because conditions and relationships in Asia are quite different than in Europe. This paper offers analysis and recommendations on how to improve the logistical security assistance situation in the Indo-Pacific.

Problem: Contested Logistics in a Conventional War Fought in the Indo-Pacific

Since 1945, the United States has enjoyed nearly uncontested movement of troops and materiel to, and in some cases throughout, different theatres of operations. Consequently, when it comes to fighting, planners had the profound luxury of focusing almost exclusively on the in-theatre conduct of military operations. They have had to address how to get troops, materiel, and supplies to the theatre of operations, but such logistical calculations have taken the form of equations without terms accounting for the possibility of adversary contestation that would force adoption of inefficient transit plans or even losses en route to the theatre, well before arrival at the front.

In addition to not having to account for the possibility of contestation, the United States has had the benefit of relying on established bases, pre-stocked supply depots, and relatively easy political and legal access to air, sea, and land transit routes. This geographical footprint is most clearly visible in noting the roughly 750 military facilities open-source analyses have estimated to exist around the world.[1]

Eighty years of operations marked by largely uncontested logistics has resulted in the creation and calcification of organizational systems and patterns of behavior that, at minimum, discount, and at maximum disregard, the impact of contested logistics on operational feasibility. This is especially true with respect to assumptions about and planning for combined operations with allies and partners.

In any future war in the Indo-Pacific, the United States is not likely to enjoy such freedom of movement. This is the case for a few reasons. First, as in all of the wars that it has fought since

[1] David Vine et al., "Drawdown: Improving U.S. and Global Security Through Military Base Closures Abroad," Quincy Institute for Responsible Statecraft, September 20, 2021, https://quincyinst.org/research/drawdown-improving-u-s-and-global-security-through-military-base-closures-abroad/; Hope O'Dell, "Where in the World Are US Military Deployed?," Blog Post, The Chicago Council on Global Affairs, The Chicago Council on Global Affairs, October 25, 2023, https://globalaffairs.org/commentary-and-analysis/blogs/us-sending-more-troops-middle-east-where-world-are-us-military-deployed.

1945, the United States will be operating along exterior lines of communication. Lines of communication, as the United States military defines them, are routes, either land, water, and/or air, that connect an operating military force with a base of operations and along which supplies and military forces move.[2] Essential components of lines of communication are not only bases, but also ports, terminals, storage depots, repair facilities, and the computer networks supporting them. Exterior lines of communication are those routes that facilitate the movement of troops and materiel as they converge on the operational theatre from outside a protective enclosed area and typically involve significant distances. Thus, they necessarily require extensive communication and coordination to ensure forward movement and arrival on a timely schedule as well as ample protection against enemy attempts at interdiction at various points on the route(s).

Second, China's prevailing theory of military victory, "Multi-Domain Precision Warfare (MDPW), envisions leveraging a command, control, communications, computers, intelligence, surveillance, and reconnaissance (C4ISR) network that incorporates advances in big data and AI…to rapidly identify key vulnerabilities in the U.S. operational system and then combine joint forces across domains to launch precision strikes against those vulnerabilities."[3] To execute the precision strikes, China is developing and deploying anti-access and area denial (A2/AD) weapons. The most significant such weapons are short- and intermediate-range ballistic missiles that can travel as far as 3,500 miles. For context, Kunsan Air Base in South Korea, the closest U.S. Air Force installation to China, sits less than 250 miles away from the Chinese coast across the Yellow Sea. Andersen Air Force Base, a strategic outpost on Guam, is fewer than 2,000 miles away.[4] China's A2/AD capabilities are most robust within the confines of the First Island Chain (a geographical line stretching from Japan through Taiwan and the Philippines to portions of Indonesia), but it is increasingly able to project force into the Philippine Sea and farther east into the Pacific.[5] Key in this capability is the dramatic growth in intermediate-range ballistic missile stockpiles (up 2,400 percent between 2012 and 2023, from 20 to 500) and launchers (up 1,150 percent between 2012 and 2023).[6]

China is also investing heavily in cyber and electromagnetic capacity for non-kinetic precision strikes. A 2024 DNI Annual threat assessment report notes, "If Beijing believed that a major conflict with the United States were imminent, it would consider aggressive cyber operations against U.S. critical infrastructure and military assets. Such a strike would be designed to deter U.S. military action by impeding U.S. decision-making, inducing societal panic, and interfering with the deployment of U.S. forces."[7] The 2024 Department of Defense report to Congress on China's military developments further notes that "The PLA almost certainly is pursuing cyber

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[2] Office of the Chairman of the Joint Chiefs of Staff, "DOD Dictionary of Military and Associated Terms," The Joint Staff, 2021, 131, https://irp.fas.org/doddir/dod/dictionary.pdf.

[3] Office of the Secretary of Defense, *Military and Security Developments Involving the People's Republic of China 2024*, Annual Report to Congress (United States Department of Defense, 2024), 30.

[4] Matthew Cox, "Pentagon Reviewing Base Defense as Experts Warn of Pacific Threats," *Air & Space Forces Magazine*, June 15, 2025, https://www.airandspaceforces.com/pentagon-reviewing-base-defense-as-experts-warn-of-pacific-threats/.

[5] Office of the Secretary of Defense, *Military and Security Developments Involving the People's Republic of China 2024*, 84.

[6] Sean M. Zeigler et al., *Assessing Progress on Air Base Defense: Past Investments and Future Options*, RRA3142-1 (RAND, 2025), 35, https://www.rand.org/pubs/research_reports/RRA3142-1.html.

[7] Office of the Director of National Intelligence, *Annual Threat Assessment of the U.S. Intelligence Community* (2024), 11, https://www.dni.gov/files/ODNI/documents/assessments/ATA-2024-Unclassified-Report.pdf.

capabilities to use in a crisis or conflict to degrade systems the U.S. military relies on for power projection."[8] Such capabilities would almost certainly be paired with improving electronic warfare techniques to jam American radar, communication, navigation, electro-optical, and hydroacoustic tools, attack computer and command networks, and damage or destroy information network and node infrastructure.[9]

Third, the combination of these factors—the United States' lengthy exterior lines of communication and China's developing precision strike capabilities— make American logistics capabilities especially vulnerable. Logistics are always targeted in war but, in a future war in the Indo-Pacific, China's kinetic and non-kinetic attacks against lines of communication and associated logistical infrastructure will likely be comprehensive with compounding effects. For example, "China's long-range missiles can destroy munitions or fuel depots at major hubs like Guam, can wipe out entire ramps of parked aircraft with effective cluster weapons, and can even hit moving supply ships at sea."[10] Attacks on information networks supporting logistical operations will degrade American visibility into its own situation and likely future Chinese lines of attack on additional logistical components. Each of these effects imposes obvious logistics costs on their own, but together they can intensify and exacerbate the difficulties inherent to moving troops and supporting materials to their destination on the necessary timetable.

The United States will thus face a contested logistics environment.[11] In a contested logistic environment "an adversary or competitor intentionally engages in activities or generates conditions, across any domain, to deny, disrupt, destroy, or defeat friendly force logistics operations, facilities, and activities."[12] Note that we are focused here solely on the United States' ability to move forces to and supply them within the theatre of operations during the run-up to and duration of combat operations; there are other logistical concerns to address with respect to the bolstering and hardening of the defense industrial base but, for the purpose of this analysis, we assume that requisite troops and materiel are available and in need transport and sustainment.[13]

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[8] Office of the Secretary of Defense, *Military and Security Developments Involving the People's Republic of China 2024*, 86.

[9] Jeffrey Engstrom, *Systems Confrontation and System Destruction Warfare: How the Chinese People's Liberation Army Seeks to Wage Modern Warfare*, RR1708 (RAND, 2018), 67, https://www.rand.org/pubs/research_reports/RR1708.html.

[10] Zachary Hughes, "Giving Our 'Paper Tiger' Real Teeth: Fixing the U.S. Military's Plans for Contested Logistics Against China," *Joint Force Quarterly* 115, no. 3 (2024): 29–30.

[11] LTC Amos C. Fox, "Contested Logistics: A Primer," Contested Logistics: A Primer, February 2, 2024, https://www.ausa.org/publications/contested-logistics-primer.

[12] Maj. Jon Michael King, "Contested Logistics Environment Defined," AUSA, February 1, 2024, https://www.army.mil/article/272922/contested_logistics_environment_defined. See also Lt. Gen. Mark Simerly and Col. Wes Adams, "The Defense Logistics Agency's Role in Overcoming the Challenges of Contested Logistics," *Defense Acquisition* 53, no. 6 (2024): 18.

[13] On the preparedness of the American defense industrial base, see, for example, Seth G. Jones, *Empty Bins in a Wartime Environment: The Challenge to the U.S. Defense Industrial Base* (Center for Strategic & International Studies, 2023), https://www.csis.org/analysis/empty-bins-wartime-environment-challenge-us-defense-industrial-base. On concerns regarding the safety and resiliency of the American defense industrial base in light of developing Chinese cyber capabilities, see, for example, Carley Welch, "China 'actively' Targeting US Industrial Base, Warns CYBERCOM Chief," *Breaking Defense*, June 27, 2024, https://breakingdefense.com/2024/06/china-actively-targeting-us-industrial-base-warns-cybercom-chief/.

In such a contested logistics environment, the United States will need to transport its ground forces and their associated equipment and supplies to theatre, land them ashore, deploy them to the battlefront, and resupply and reinforce them throughout operations, in the face of challenges not confronted since World War II—that is, not confronted by any currently active American military servicemember. The U.S. will need to control land, sea, and air lines of communication (threatened by the aforementioned kinetic and non-kinetic interdiction capabilities); secure routes with the appropriate port, base, and other infrastructure (varying widely, depending on the destination); possess transport equipment (potentially unavailable when needed, depending on the positioning and functionality of civilian vessels earmarked for military requisition in times of war); and employ trained personnel who understand how to perform logistical functions in the face of friction experienced by few and attacks unconfronted by anyone currently serving. These are all considerable hurdles to clear before attempting any combat operation.

Problem: Newfound Hurdles to Fighting with Allies and Partners

The United States would not be the only belligerent facing such challenges to logistical operations in a future conventional war in the Indo-Pacific. All of its allies and partners would be required to overcome the same hurdles, and each, with fewer resources to dedicate to the problem, would likely struggle more than would the United States. Critically, though, the collective logistical capacity of the United States and its allies and partners in combined operations cannot be understood as merely the sum of the logistical abilities and performances of the individual forces (planning on) fighting together. This is because *fighting alongside operational partners in a future war would introduce further logistical difficulties.* The resources required to equip and supply forces raised and trained by different countries will need procurement; the interoperability of logistics equipment, systems, and processes will need ensuring; and deconfliction of logistics efforts along shared lines of communication and distribution nodes will need achievement to make combined operations feasible.

Even if, for example, each partner force individually possesses robust and resilient logistical capacities that can withstand concerted Chinese efforts at degradation, the close proximity caused by operating in a shared battlespace introduces novel requirements for logistics operations using shared ports, railways and railheads, roads, and airspace; at minimum, deconfliction would be required and, more likely, partners would be forced to develop plans and processes for sharing resources, supply depots, transportation equipment and personnel, etc.[14] If individual partners are logistically less capable, one or more partners will have to over-provide resources, transport, and other services, introducing questions of interoperability not only in weapons, ammunition, supplies, and other equipment, but also processes for meeting individual units' requirements before and during combat.[15] Even if one partner assumes the responsibility for managing logistics for the entirety of the combined force—something that would be infeasible for the even United States to do in a future conventional war in the Indo-Pacific—interoperability problems would remain unsolved, as the requirements of individual forces raised, trained, and equipped by different political communities will differ along myriad

[14] For a description of these efforts during the preparation for and execution of Operation Desert Storm, see William G. Pagonis, *Moving Mountains: Lessons in Leadership and Logistics from the Gulf War* (Harvard Business School Press, 1994).

[15] This is similar to how the U.S. had to support its partners logistically during the Korean War; for a description, see Jeffrey Grey, *The Commonwealth Armies and the Korean War: An Alliance Study* (Manchester University Press, 1988).

dimensions.[16] In short, logistics are markedly more challenging when executed in preparation for and support of combined operations than solo operations, and some cooperative efforts must be taken, and structures installed, to facilitate collective transport and sustainment of troops drawn from multiple nations.

One intuitive solution to this problem is to adopt collective logistical systems and processes like those employed by NATO members. This is not feasible in the near-term, however, because NATO is unique and there is not an equivalent body (or elements of an equivalent body) in the Indo-Pacific. NATO is globally and historically distinctive as a collective logistics management organization in several respects. It has established logistics doctrine.[17] It has dedicated administrative bodies to move troops and material: the Logistics Committee coordinates policy and planning on military logistics matters, interoperability amongst NATO allies, and logistics cooperation with partners, while the Movement and Transport Committee focuses on movement of troops and material by land, sea, and air.[18] It also has mechanisms in place promoting the coordination of supply, including provision of joint management of available common supplies through the NATO Logistics Stock Exchange and allowing member nations to electronically purchase and sell supplies with a NATO Stock Number. In this way, it provides an alternative pathway for member countries to procure hard-to-source parts.[19] Further boosting NATO's logistical capacity is its ability to test members' collective logistics capacity. There are dedicated annual multinational exercises in which logistical challenges are identified and targeted for mitigation.[20] Finally, NATO promotes interoperability among member states by assisting with the coordination of defense industry production. NATO's coordination helps its members identify and procure the equipment to defend themselves, including ensuring national systems can integrate seamlessly and work together when needed.[21]

This robust NATO logistics infrastructure simply does not exist in the Indo-Pacific, nor can the United States and its allies and partners expect immediate implementation for a few reasons. First, as a practical matter, NATO's logistical capacity is the product of the eighty years of investment into its development and standardization. Second, the nature of international cooperation in the region makes initiating the kind of collective effort made by NATO exceedingly difficult. Unlike in Europe and the North Atlantic, where alliance and partnership

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[16] For extended assessments of interoperability requirements and shortcomings, even in U.S. relationships with close partners, see Jennifer D. P. Moroney et al., *A Capabilities-Based Strategy for Army Security Cooperation* (RAND Corporation, 2007); Christopher G. Pernin et al., *Targeted Interoperability: A New Imperative for Multinational Operations* (RAND Corporation, 2019).

[17] Defence Policy and Planning Division, "NATO Logistics Handbook," North Atlantic Treaty Organization Headquarters, 2012, https://www.nato.int/docu/logi-en/logistics_hndbk_2012-en.pdf; NATO Standardization Agency, "AJP-4.4: Allied Joint Movement and Transportation Doctrine," NATO Standardization Office, May 2013, https://www.coemed.org/files/stanags/01_AJP/ajp-4.4_edb_v1_e_2506.pdf.

[18] NATO, "Logistics Committee," NATO, July 29, 2024, https://www.nato.int/cps/en/natohq/topics_61715.htm.

[19] Beth Reece, "Global Logisticians Learn about DLA's Growing Support through NATO Logistics Stock Exchange," Defense Logistics Agency, March 27, 2024, https://www.dla.mil/About-DLA/News/News-Article-View/Article/3718005/global-logisticians-learn-about-dlas-growing-support-through-nato-logistics-sto/.

[20] See, for example, NATO, "National Logistics Directors Address Lessons Learned from NATO's Largest Exercise in Decades," NATO, November 21, 2024, https://www.nato.int/cps/en/natohq/news_230708.htm.

[21] NATO, "NATO's Role in Defence Industry Production," NATO, June 26, 2025, https://www.nato.int/cps/en/natohq/topics_222589.htm.

agreements manifest as a collective concern, the Indo-Pacific alliance and partnership system is a hub-and-spokes model with the United States acting as the nucleus that forges bilateral agreements with Asian partners that often exhibit significant disunity and internecine rivalry. As a result, there is no common strategic framework allowing for a collective logistics doctrine or standardization. Attempts have been made to create a shared logistical culture. The Indo-Pacific Logistics Network (IPLN) pilot project, for example, was launched in 2025 following a table top simulation exercise in Hawaii in May 2025 as an effort to facilitate faster and more coordinated responses to natural disasters by leveraging shared airlift capacity and logistics strengths amongst Quad members (Australia, India, Japan, and the United States).[22] These efforts, however, are in their infancy.

All of this indicates that, even if the United States and its allies and partners can individually build, protect, and operate effective logistical capacities during a future conventional war in the Indo-Pacific in which such efforts are contested (a dubious proposition for reasons laid out above), they are far from being able to collectively manage the logistical requirements necessary to execute effective combined operations during combat in the region.

The collective logistical incapacity of the United States and its allies and partners as they consider combined operations during a future conventional war in the Indo-Pacific is then likely to impact not only the effectiveness of any cooperative combat effort, but also the likelihood that various militaries will take part at all. *Allied and partner logistical concerns are a key hurdle to the ability to fight alongside others*. If they cannot get their troops to the front and sustain them over the expected course of combat, then belligerents are especially unlikely to undertake any combined effort.[23]

The absence of allies and partners on the battlefield would likely have deleterious effects on American warfighting capabilities. *Fighting alongside others has proven critical to effectiveness and efficiency on the battlefield in addition to easing economic, military, and political burden sharing concerns.* Historically, battlefield coalitions—amalgams of officers, troops, and materiel brought together by multiple distinct political communities for the purpose of jointly waging combat in the same operational battlespace—have proven to be a boon for belligerents fighting conventional wars. *Battlefield coalitions win more often than fighting alone*. Between 1900 and 2003, battlefield coalitions emerged victorious 53 percent of the time, compared to a 46 percent victory rate for forces fighting alone. *Battlefield coalitions are also more efficient*. When forces fight in combined operations, on average, they suffer 4 percent fewer casualties than when fighting alone. In a hypothetical battle involving 40,000 troops—the median number belligerent sides deployed in 492 battles waged during 62 conventional interstate wars fought between 1900 and 2003—this 4 percent difference is equivalent to a battlefield coalition suffering over 1,500 fewer casualties than a solo belligerent. Effectiveness and efficiency figures are even more

[22] Mandeep Singh, "Quad Logistics Integration Strengthens Indo-Pacific Defense Posture," *Indo-Pacific Defense FORUM*, July 10, 2025, https://ipdefenseforum.com/2025/07/quad-logistics-integration-strengthens-indo-pacific-defense-posture/; Office of the Spokesperson, "Quad Concludes Simulation Exercise to Advance Indo-Pacific Logistics Network," United States Department of State, May 7, 2025, https://www.state.gov/releases/office-of-the-spokesperson/2025/05/quad-concludes-simulation-exercise-to-advance-indo-pacific-logistics-network/.

[23] We make this argument in extended form in our book manuscript, Rosella Cappella Zielinski and Ryan Grauer, "Why Militaries Fight Together: Understanding Battlefield Coalition Formation during the Burma Campaign," unpublished manuscript, Boston, MA; Pittsburgh, PA, May 2025.

impressive when American forces fight in battlefield coalitions. When troops fielded by the United States fought in battlefield coalitions between 1900 and 2003, those groups won 86% of their battles and suffered almost 9% fewer casualties than forces fighting alone.[24]

In short, *it is likely that partner concerns about their own and collective logistical capacity impose significant constraints on their readiness and willingness to engage in security cooperation efforts and, specifically, combined operations during wartime*. Consequently, *ignoring or downplaying logistical concerns as part of a security assistant project would necessarily undermine efforts to field and fight effectively with a multinational force*.

Policy Discussion and Recommendations

To provide the requisite security assistance and ensure allies and partners are logistically capable of fighting alongside the United States and or groupings amongst themselves in support of combined operations in a future war in the Indo-Pacific, it is crucial a) all potential operational partners understand respective logistical capacities, especially under conditions of contested logistics; b) the United States invests in and bolsters allies' and partners' individual logistical capacity; and c) the United States prepare to absorb the costs and challenges of collective logistical operations by supporting partners and allies during a conflict with requisite equipment and supplies as well as extra- and intra-theatre lift capacity.

A clear, comprehensive, and accurate understanding of allied and partner logistical capacity under contested logistical conditions is crucial to being able to both effect and support combined operations during a future conventional war in the Indo-Pacific. Thus, the United States particularly, and all potential operational partners ideally, needs to develop stronger insight into and appreciation of allied and partner logistical capacity. Specifically, the United States needs to understand:

- Minimum logistical requirements for likely operations, including critical information about formations such as how many personnel are required, what equipment will be used, bulk fuel capacity requirements, type(s) of fuel to be used, and where and how repairs to damaged equipment will be made, how troops will be delivered to the battlefield and casualties will be evacuated, etc.
- Assuming effective Chinese contestation of logistical efforts, which of the anticipated requirements can be met by American military forces and which requirements will need allied and partner contribution and participation.
- What allies and partners believe they are currently capable of achieving logistically, both individually and as part of a combined force, and what they believe they still require to be logistically capable in anticipated operations.
- Assumptions potential operational partners have regarding American and other partner logistical support, especially in the face of kinetic and non-kinetic interdiction.

The United States and its allies and partners can gain this shared understanding through multilateral exercises (to improve logistical situational awareness and begin to resolve issues the

[24] Rosella Cappella Zielinski and Ryan Grauer, "A Century of Coalitions in Battle: Incidence, Composition, and Performance, 1900-2003," *Journal of Strategic Studies* 45, no. 2 (2022): 196, 201–2.

United States and its partners uncover during the exercises) and logistics liaisons. The United States should, accordingly:

- Bolster and expand current efforts to organize and execute multinational exercises focused on logistical operations, with an emphasis on training, coordination, and sustainment. Ideally, over time, these multinational exercises will move beyond being U.S.-led bilateral exercises and place the allied and partner units at the center. Models of such exercises included Allied Spirit, a U.S. Army exercise for multinational partners conducted at 7th Army Training Command training areas at Grafenwoehr and Hohenfels, Germany. Unlike other exercises, which feature U.S. formations in the lead role, with allies and partners supporting the force, Allied Spirit places an allied unit as the lead force.[25] The existing Cobra Gold exercise series, executed with Indo-Pacific partners, could serve as the foundation for such efforts.[26] The logistical components of such improved exercises should be real-world and real-time to the maximum extent possible, rather than carried out in simulation or table-top form.
- Promote and expand logistical liaisons at the unit, service, and combatant command level as well as within the Defense Logistics Agency. Allied and partner personnel should be embedded in such units in the United States, and American personnel should be embedded in allied and partner equivalent units. Priority should be placed on building up logistical liaison relationships with non-NATO allies and partners.
- Promote logistical understanding with allies and partners through increased personnel attendance at American Professional Military Education institutions and combined programs specifically addressing logistical considerations. Currently, only 8% of the students at the Eisenhower School for National Security and Resource Strategy are international students. Increasing this number and specifically increasing the number of international logistics officers from allied and partner nations in the Indo-Pacific region will facilitate increased information exchange and the necessary collective understanding of combined logistical capabilities and needs. Simultaneously expanding curricula on Joint logistics to include more focus on combined logistics, ideally with an emphasis on the Indo-Pacific region, will bolster understanding and help identify current weaknesses and paths forward.

The United States also needs to continue to invest in combined logistical capacity that will support potential operational partners. It can do so by:

- Developing a shared logistical culture through logistical liaisons and multinational logistic exercises as well as shared training at professional military education programs.
- Cross-training allies and partners on American sea, air, and land transport equipment.
- Promoting logistical interoperability by increasing advising on both acquisition decisions and process development.
- Building up both physical systems and logistics tactics, techniques, and procedures to ensure deconfliction in combined logistical operations.

[25] "Allied Spirit," U.S. Army Europe and Africa, March 14, 2025, https://www.europeafrica.army.mil/What-We-Do/Exercises/Allied-Spirit/.

[26] United States Department of Defense, "Spotlight: Cobra Gold," U.S. Department of Defense, accessed July 31, 2025, https://www.defense.gov/Spotlights/Cobra-Gold/.

- Exploring the possibility of modifying components of existing collective logistical models, ranging from the NATO Logistics Committee to the Ukraine Defense Contact Group, to determine what structures and processes might be applied in the unique hub-and-spoke alliance and partnership arrangement that currently exists in the Indo-Pacific.

Finally, to the extent possible, the United States should work to reduce reliance on lengthy lines of communications, so as to be better positioned to support allies and partners during a future war in the Indo-Pacific. Essential tasks here include:

- Moving more quickly and comprehensively to invest in in-theatre logistics hubs in allied and partner nations. Core efforts to be made are pre-positioning stockpiles—with all necessary attention paid to the capabilities and ranges of Chinese precision strike munitions and requisite defenses—and bolstering logistical infrastructure like ports, roads, airfields, warehouses, and the like.[27]
- Identifying materials that would be most advantageous to pre-position, such that the United States could more easily support not only American forces, but allied and partner formations.
- Engage with allies and partners diplomatically to ensure that all political and legal permissions to execute logistical operations on and through their territory and airspace are pre-approved, and prepare all necessary memoranda of understanding such that they are ready for signature and implementation in the event of war.[28]

Conclusion

A future conventional war in the Indo-Pacific will be unlike any that the United States has fought since the end of World War II. Among the many signal features of such a conflict would be the contested nature of American and allied and partner logistical operations. Logistical capacity is foundational for the successful execution of all military operations and, conversely, logistical incapacity is a core driver of allied and partner decisions to forego combined operations. Given the benefits of fighting through battlefield coalitions, it is in the American interest to provide the requisite security assistance ensure that both United States and allied and partner forces are logistically prepared to execute combined operations in the Indo-Pacific. Existing alliance and partnership networks in the region preclude the easy transposition of the robust—and largely successful—model of combined logistics that NATO has developed over the past eighty years. The United States and its partners are not wholly without foundation in developing their collective logistical capacity in the Indo-Pacific, but they do need to develop their collective understanding of each other's capabilities and current weaknesses before they can begin to

[27] Some such efforts are underway, but more effort by all services—and in close coordination with allied and partner services, is required. Meghann Myers, "Army Prepping for Pacific Conflict with Prepositioned Equipment, Logistics Hubs," *Defense One*, May 14, 2025, https://www.defenseone.com/threats/2025/05/army-prepping-pacific-conflict-prepositioned-equipment-logistics-hubs/405331/; Seth Robson, "US, Australian Troops Lead Record Logistics Push during Talisman Sabre Drills," *Stars and Stripes*, July 24, 2025, https://www.stripes.com/theaters/asia_pacific/2025-07-24/talisman-sabre-exercise-logistics-18537716.html.

[28] For an example of such an agreement, see Mallory Shelbourne, "Navy Inks New Logistics Deal with Japan, Australia," *USNI News*, July 22, 2025, https://news.usni.org/2025/07/22/navy-inks-new-logistics-deal-with-japan-australia.

effectively correct current flaws and bolster existing systems and processes. Increased military-to-military contacts and more frequent, realistic, and taxing logistical exercises will be core to this process and will strengthen the foundation for decisions about infrastructure and equipment investment. The result will be an increased likelihood that the United States will be able to fight effectively with allies and partners in a potential future conventional war against China.

Policy Recommendation Summary

To effect necessary security assistance and ensure allies and partners are logistically capable of fighting alongside the United States and or groupings amongst themselves in support of combined operations in a future war in the Indo-Pacific, it is crucial that

- The United States and its allies and partners can gain a shared understanding of respective logistical capacities through multilateral exercises (to improve logistical situational awareness and begin to resolve issues the United States and its partners uncover during the exercises) and logistics liaisons at the unit, service, and combatant command level as well as within the Defense Logistics Agency.
- The United States promote logistical understanding with allies and partners through increased personnel attendance at American Professional Military Education institutions and combined programs specifically addressing logistical considerations.
- Policymakers explore the possibility of modifying components of existing collective logistical models, ranging from the NATO Logistics Committee to the Ukraine Defense Contact Group, to determine what structures and processes might be applied in the unique hub-and-spoke alliance and partnership arrangement that currently exists in the Indo-Pacific.
- The United States more quickly and comprehensively to invest in in-theatre logistics hubs in allied and partner nations. Core efforts to be made are pre-positioning stockpiles—with all necessary attention paid to the capabilities and ranges of Chinese precision strike munitions and requisite defenses—and bolstering logistical infrastructure like ports, roads, airfields, warehouses, and the like
- The United States and its allies and partners identify materials that would be most advantageous to pre-position, such that the United States could more easily support not only American forces, but allied and partner formations

Questions for Forum

- How do allies and partners in the Indo-Pacific understand their logistical capacity? To what extent and to what end do they want United States support to build their logistical capacity?
- To what extent is the United States willing and or prepared to logistically support allies and partners in the Indo-Pacific during wartime?
- Does the DoD have enough capacity to work with partners to build such capacity?
- To what extent should the United States support the creation of a shared logistical doctrine and administrative bodies to coordinate logistical efforts, coordination of logistical command authority, and interoperability with allies and partners in the Indo-Pacific?
- Should the United States pursue an Indo-Pacific logistics committee (akin to NATO's Logistic Committee) to address policy development and planning on civil and military logistics matters, logistics cooperation, and coordinating authority across the whole spectrum of logistics functions in the Indo-Pacific?

Background Research - Paper 3

Gates Forum IV

The Changing Face of China's Security Cooperation: Implications for U.S. Security Force Assistance Programs

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Executive Summary

How can the United States redesign its security assistance to best advance its national interests, deliver effective results, and respond to changing international circumstances? This paper argues that in an era of great power competition oriented around the People's Republic of China (PRC) as the "pacing challenge,"[1] the United States will be able to most effectively deploy security force assistance as a tool of statecraft and American grand strategy only if it understands the changing face of Chinese security cooperation, a rapidly emerging phenomenon that is reshaping the global security environment. It outlines where and how China employs security assistance as a tool of its internal and external security goals, and identifies the comparative advantages that the PRC brings to bear in the security cooperation space. It then outlines the set of choices that China's growing security outreach presents to U.S. policymakers, and identifies opportunities to improve the United States' ability to succeed in strategic competition, as well as risks posed by the emerging competitive landscape. It concludes with recommendations and lays out some questions for the Forum.

China's Evolving Security Outreach: Examining Comparative Advantages

In the last several years, the PRC has emerged as a global security provider. Today, it offers security assistance to a growing number of countries, especially assistance focused on internal and non-traditional security. China conducts global security cooperation and outreach in three major categories: 1) security diplomacy at the global, regional, and bilateral levels; 2) provision of police and law enforcement training;[2] and export of surveillance and other policing technology.[3] These activities allow the PRC to use a relatively light and non-militarized footprint to bolster its presence, partnerships, and influence abroad.[4] They are most concentrated on China's regional periphery – in areas such as Southeast Asia, the Pacific Islands, and Central Asia – but are accompanied by narratives and diplomatic proposals that seek to reshape global security governance and cooperation at both the

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[1] Pete Hegseth [U.S. Secretary of Defense], "Secretary of Defense Pete Hegseth Delivers Keynote Address at Special Operations Week 2025," Transcript, U.S. Department of Defense, 6 May 2025, https://www.defense.gov/News/Transcripts/Transcript/article/4176603/secretary-of-defense-pete-hegseth-delivers-keynote-address-at-special-operation/

[2] Jordan Link, *The Expanding International Reach of China's Police* (Washington, DC: Center for American Progress, 2022), https://www.americanprogress.org/article/theexpanding-international-reach-of-chinas-police/

[3] Sheena Chestnut Greitens, *Dealing with Global Demand for China's Surveillance Exports* (Washington, DC: Brookings Institution, 2020), www.brookings.edu/articles/dealing-with-demand-for-chinas-global-surveillance-exports/; Sheena Chestnut Greitens, Rana Inboden, and Adam Klein, *China's Authoritarian Exports* (Strauss Center for International Security and Law, University of Texas at Austin, July 2025).

[4] Sheena Chestnut Greitens, "China's Use of Non-Traditional Strategic Landpower in Asia." *Parameters,* Vol. 54, No. 1 (Spring 2024): 35-50.

regional and the global level, and include some emerging security outreach to further-flung areas in Africa and Latin America.[5]

China's growing role as a security provider overturns conventional wisdom, which has long considered Asia (and to some extent the world) functionally divided between the United States as the global security provider and China as an economic partner. Third countries' security relationships with Washington and Beijing are evolving: many now seek security cooperation with both great powers at once. This is possible because the type of assistance that third countries can obtain from each great power is different, with the United States possessing comparative advantages in conventional external defense and military power, and China possessing comparative advantages in internal stability, social control, and regime security. In a recent article, my co-author and I termed this phenomenon of overlapping security assistance "security hybridization."[6] Security hybridization fundamentally differentiates today's global security environment from the conditions of US-Soviet rivalry during the Cold War, when Washington and Moscow simultaneously provided both internal and external security assistance to countries on their respective sides of the bipolar divide. It has important policy implications, discussed in more depth below.

The Conceptual Basis of China's Security Assistance

Beijing and Washington each provide security assistance that matches how they understand and address their own national security. Overall, the United States prioritizes military power in pursuit of regional security; China relies on law enforcement and internal security agencies to uphold regime security – as evidenced in the "White Paper on National Security" released in May 2025.[7] U.S. alliances and partnerships, therefore, tend to focus on deterring and combating external threats and maintaining regional peace and security, whereas PRC security relationships often center on managing internal instability and controlling domestic challenges to a country's political order and leadership.

This is, to be clear, a phenomenon in grayscale rather than in black and white: the People's Liberation Army (PLA) conducts traditional military diplomacy and cooperation, and the United States offers some foreign internal defense and law enforcement capacity-building assistance. The distinction, however, remains meaningful as there are significant differences in emphasis and resource

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[5] Ministry of Foreign Affairs [MOFA], PRC, *Proposal of the People's Republic of China on the Reform of Global Governance,* 13 September 2023, https://www.mfa.gov.cn/eng/zy/gb/202405/t20240531_11367498.html; Sheena Chestnut Greitens, Isaac Kardon, and Cameron Waltz, *A New Cop on the Beat? China's Internal Security Outreach under the Global Security Initiative* (Carnegie Endowment for International Peace, 2025).

[6] Sheena Chestnut Greitens and Isaac Kardon, "Security without Exclusivity: Hybrid Alignment under U.S.-China Competition." *International Security,* Vol. 49, No. 3 (Winter 2024-25): 122-163.

[7] State Council Information Office, PRC, "China Releases White Paper on National Security," *Xinhua*, 12 May 2025, http://english.scio.gov.cn/whitepapers/2025-05/12/content_117870467.html

allocation, even (or especially) in cases where security provision overlaps. Thus, while this activity exists on a spectrum, China's provision of internal security capabilities and tools poses a particular set of challenges for policymakers interested in effective re-design of U.S. security assistance programs.

China's security outreach is rooted in both the "comprehensive national security concept" (总体国家安全观, *zongti guojia anquanguan*) promulgated by Xi Jinping in 2014, and the Global Security Initiative (全球安全倡议, GSI), which was announced in 2022 and extends the comprehensive national security concept into China's foreign policy.[8] The comprehensive national security concept explicitly centers on regime security, and argues that the "fundamental task" or "core" of national security is the regime's "political security" – the security of China's socialist system, the authority of the Chinese Communist Party (CCP) and its leadership, and Xi Jinping as the core of that leadership.[9] Given a heavy emphasis on regime security, Beijing's efforts to secure China's political system and party leadership assign comparatively larger roles to law enforcement, paramilitary, and secret police agencies that focus on internal security and political policing, and use tools like surveillance, which China has developed and refined for internal security and stability-maintenance purposes.[10]

For the CCP, many of the most urgent security concerns arise from either domestic sources or external attempts to infiltrate China and destabilize or threaten party rule; this latter perception of threat makes a foreign policy component of China's security concept essential. As a result, the external dimensions of the comprehensive national security concept have gained prominence over the course of Xi's tenure. China's outreach appears to have accelerated in part thanks to Xi's urging in 2017 that the Chinese political-legal system (internal security apparatus) should adopt "a global vision for state

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[8] *Xinhua*, "习近平提出全球安全倡议" [Xi Jinping proposes Global Security Initiative]," 21 April 2022, https://web.archive.org/web/20220421024303/http://www.news.cn/politics/leaders/2022-04/21/c_1128580296.htm; *Xinhua*, "China Releases Global Security Initiative Concept Paper," 21 February 2023, https://english.news.cn/20230221/75375646823e4060832c760e00a1ec19/c.html; Ministry of Foreign Affairs [MOFA], People's Republic of China, *The Global Security Initiative Concept Paper,* 2 Feb. 2023, https://web.archive.org/web/20230221033350/https://english.news.cn/20230221/75375646823e4060832c760e00a1ec19/c.html; Wang Yi, "Acting on the Global Security Initiative to Safeguard World Peace and Tranquility," MOFA, April 24, 2022, https://archive.ph/OIP54; China Institute for International Studies [CIIS], *Report on the Implementation Progress of the Global Security Initiative* (July 2024), https://www.ciis.org.cn/english/NEWS_183/202407/t20240718_9313.html

[9] *Renmin Ribao,* "为什么说政治安全是国家安全的根本? [Why say that political security is the root of national security?]," 6 December 2021, https://archive.ph/I7Fz4#selection-2461.586-2461.788; Sheena Chestnut Greitens, "Xi's Quest for Order," *Foreign Affairs,* October 2022, https://www.foreignaffairs.com/china/xi-jinping-quest-order

[10] Minxin Pei, *The Sentinel State: Surveillance and the Survival of Dictatorship in China* (Cambridge, MA: Harvard University Press, 2024); Sheena Chestnut Greitens, "Domestic Security in China under Xi Jinping," *China Leadership Monitor,* Vol. 59 (Spring 2019), https://www.prcleader.org/_les/ugd/10535f_3956a9f198fa43f99ed6f8c5e89889f6.pdf

security work."[11] Since 2022, when Xi Jinping proposed the Global Security Initiative at a speech at the Boao Forum, GSI has become the organizing framework for these efforts. Xi and other senior Chinese officials have laid out the vision for GSI in a number of key documents and speeches: GSI has been bundled with the Global Development Initiative (GDI, proposed in 2021) and Global Civilizational Initiative (GCI, proposed in 2023) to form "three global initiatives" that are discussed as pillars of the PRC's proposal to create "a community of common destiny for mankind."[12]

Chinese official documents explicitly describe international security as a "support" in this framework,[13] suggesting that we should interpret China's global security behavior through the lens of how it supports regime security at home. Externally, China tends to establish security relationships that reflect its domestic emphasis on prioritizing stability and control in internal affairs, and the PRC's domestic security agencies, rather than its armed forces, are the lead actors in implementing much of its foreign security cooperation. This means that Chinese security assistance must be assessed not only by examining activities carried out by the PLA and the Central Military Commission's Office of International Military Cooperation (CMC-OIMC),[14] but civilian security actors such as the Ministry of Public Security (MPS), Ministry of State Security (MSS), Central Political-Legal Commission (CPLC), and People's Armed Police (PAP). The American foreign and defense policy community has, thus far, largely overlooked expansion and growth in external activity by this second set of actors, despite the significant role that they play in overall patterns of PRC security cooperation and outreach.

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[11] CGTN, "Xi Calls for Global Vision in China's National Security Work," 18 February 2017, http://www.china.org.cn/video/2017-02/18/content_40313020.htm

[12] 人类命运共同体, also translated as "community with a shared future for humankind." See *Xinhua*, "携手建设更加美好的世界——写在习近平主席提出构建人类命运共同体理念十周年之际［Working together to build a better world – Written on the 10th anniversary of Xi Jinping's proposal to build a community with a shared future for mankind]," 23 March 2023, https://web.archive.org/web/20230323121220/http://www.gov.cn/xinwen/2023-03/23/content_5747952.htm; *Xinhua*, "中央外事工作会议在北京举行 习近平发表重要讲话" [Central Foreign Affairs Work Conference Held in Beijing, Xi Jinping Delivers an Important Speech], *Xinhua*, December 28, 2023, https://web.archive.org/web/0/https://www.12371.cn/2023/12/28/ARTI1703764696024461.shtml; Wang Yi, "Acting on the Global Security Initiative"; MOFA, *Global Security Initiative Concept Paper*.

[13] "Xi Jinping: Adhere to the Concept of Comprehensive National Security and Take the Road of National Security with Chinese Characteristics" ["习近平：坚持总体国家安全观 走中国特色国家安全道路]," *Xinhua*, 15 April 2014, https://web.archive.org/web/20250316160504/http://www.xinhuanet.com//politics/2014-04/15/c_1110253910.htm

[14] Joel Wuthnow and Phillip Saunders, *China's Quest for Military Supremacy* (Polity Press, 2025).

China's 2025 "White Paper on National Security" describes GSI as bringing "a global outlook to the holistic approach to national security."[15] It also emphasizes the degree of success that the PRC has had in creating a "Safe China," in terms of low crime rates and expanding lifespan – a narrative that juxtaposes with China's criticisms of the United States in places like its annual report on human rights violations in the United States, which contains sharp criticism of the American failure to protect citizens from gun violence, crime, racism, and other non-traditional security threats.[16] In other words, China has developed, and actively deploys strategic narratives about, China's unique comparative advantages in the security space. China's corresponding assistance focuses on helping clients protect their regimes and achieve a type of security grounded in domestic political control and social stability—forms of security that are distinct from those that the United States emphasizes and provides, and for which the United States does not necessarily have global comparative advantages.

Beyond these strategic narratives, China's more concrete lines of effort as a global security provider generally fall into 3 broad categories. These are diplomatic outreach by the internal security apparatus to construct new security architecture at the global multilateral, regional, and bilateral levels; provision of police and law enforcement training programs; and the export of surveillance technology and other police equipment and services.

Diplomatic Outreach by China's Internal Security Apparatus

China's outreach via police and law enforcement diplomacy has become a major component of PRC foreign policy, and occurs at the bilateral, regional, and global levels.[17] Its flagship multilateral effort under the Global Security Initiative is the creation of the Global Public Security Cooperation Forum (Lianyungang) (GPSCFL), now the largest global security conference hosted each year by the PRC. GPSCFL, previously called the Lianyungang Forum (for the city in which it began), is hosted annually by the MPS. As Figure 1 shows, international participation in GPSCFL has grown significantly in the last several years; in 2024, MPS officials claimed that personnel from over 120 countries, regions, and organizations had participated in the GPSCFL.[18]

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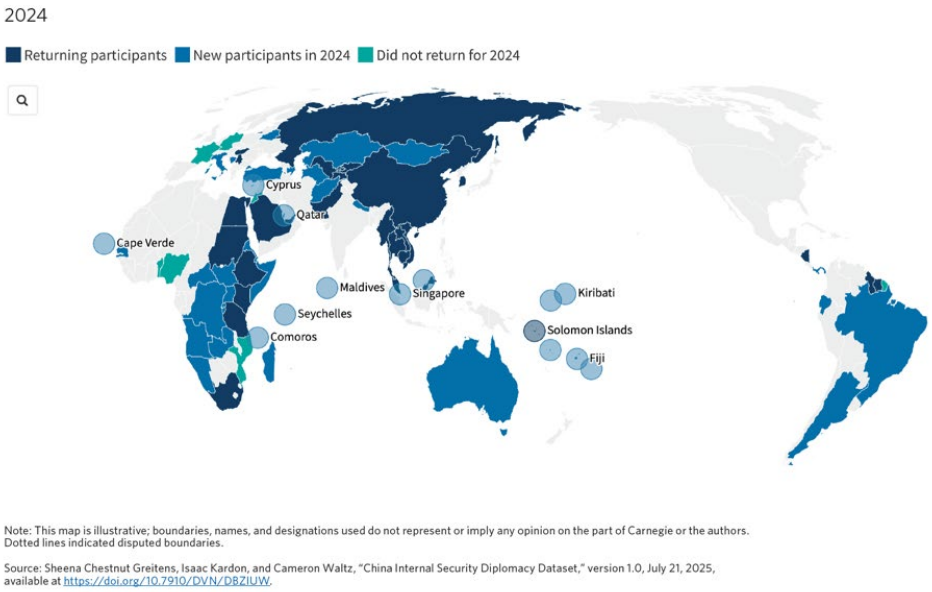
[15] Note that "holistic approach to national security" is another way to translate 总体国家安全观, or "comprehensive national security concept."

[16] State Council Information Office, PRC, "China Releases White Paper on National Security," *Xinhua*, 12 May 2025, http://english.scio.gov.cn/whitepapers/2025-05/12/content_117870467.html; State Council Information Office [SCIO], "China Issues Report on US Human Rights Violations in 2023," *Xinhua*, 29 May 2024, http://english.scio.gov.cn/m/scionews/2024-05/29/content_117221007.htm

[17] Chestnut Greitens, Kardon, and Waltz, *A New World Cop on the Beat.*

[18] *Global Times,* "China Proposes 10 Measures to Handle New Risks at Global Public Security Cooperation Forum," *Global Times,* 10 September 2024, https://www.globaltimes.cn/page/202409/1319580.shtml ; Wang Qingyun, "Police Training Offered to Enhance Intl Cooperation," *China Daily,* 10 September 2024, https://www.chinadaily.com.cn/a/202409/10/WS66df9b92a3103711928a70bf.html

Figure: Participation in China's Global Public Security Cooperation Forum (Lianyungang)[19]



China also engages in a robust pattern of regional and bilateral security diplomacy. Minister of Public Security Wang Xiaohong and head of the CPLC Chen Wenqing both meet regularly with international counterparts to discuss law enforcement and internal security cooperation.[20]

Moreover, under the auspices of the Global Security Initiative, as well as more broadly, China has engaged in regional security outreach through the Lancang-Mekong Security Forum in Southeast Asia,[21] the Shanghai Cooperation Organization in Central Asia,[22] and a new multilateral security dialogue with officials from the Pacific Islands Countries (PICs), which held its third iteration in fall 2024 in Fujian.[23] China has also begun to explore new mechanisms of regionally-scoped law enforcement collaboration with officials in Africa and Latin America.[24]

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[19] Figure from Chestnut Greitens, Kardon, & Waltz, *A New Cop on the Beat*, p. 14.

[20] Chestnut Greitens, Kardon, and Waltz, *A New Cop on the Beat; see also Chestnut Greitens 2024.*

[21] Bates Gill, Carla Freeman, and Alison MacFarland, *China's Global Security Initiative Takes Shape in Southeast and Central Asia* (Washington, DC: United States Institute of Peace, November 2024).

[22] *Reuters*, "China's Xi Urges Russia and Other Countries to Work at Preventing 'Colour Revolutions,'" *Reuters (website),* 16 September 2022, https://www.reuters.com/world/asia-pacific/chinas-xi-says-china-will-help-train-law-enforcement-personnel-sco-countries-2022-09-16/

[23] Xu Keyue, "China, PICs to Build Law Enforcement Team for Lasting Security," *Global Times*, 12 September 2024, https://www.globaltimes.cn/page/202409/1319725.shtml

[24] Chestnut Greitens, Kardon, and Waltz, *A New Cop on the Beat.*

Export of Surveillance Technology and Police Equipment

Alongside its efforts to construct new global and regional security architecture, and growing bilateral security outreach, China has become a leading exporter of surveillance technology and police equipment. By the late 2000s, China had developed a "vibrant and segmented security industry" in which the "surveillance giants" dominated export markets,[25] and these companies are major players in global markets for surveillance and security technology today. Figure 2 shows China's emergence as a key exporter of surveillance technology platforms, a phenomenon that began around 2008:

Figure: Export Destinations of Chinese Surveillance Technology Platforms[26]

Source: Author's dataset

Huawei, in particular, became known for its provision of "Safe City Solutions," platforms for use in policing and law enforcement that collect, integrate, and analyze data from a wide range of sources, from existing government records and databases to AI-enabled surveillance cameras.[27]

This trend continues today, and has increasingly intersected with other facets of China's security assistance abroad. In 2024, for example, GPSCF began hosting a public security tech expo that showcased a reported 45 Chinese domestic security companies.[28] One vendor described meeting

[25] Huang and Tsai.

[26] Figure from Chestnut Greitens, *Dealing with Demand for China's Surveillance Exports.*

[27] Chestnut Greitens, *Dealing with Demand for China's Surveillance Exports*; Chestnut Greitens, Inboden, and Klein, *China's Authoritarian Exports.*

[28] Lianyungang Forum. "The First Public Security Tech Expo (Lianyungang) Inaugurated." n.d. https://www.lianyungangforum.org/en/news/68.html

with government and corporate representatives from the Middle East, Southeast Asia, and Europe and said that participation had increased the company's "brand influence and market competitiveness in the field of public security technology."[29]

The PRC Ministry of Public Security also hosts the China International Exhibition on Police Equipment (CIEPE), which began in 2002. The 12th annual CIEPE occurred in May 2025 in Beijing, and an MPS official stated that the exhibition featured "30 international exhibitors from 11 countries, including the US, Canada, Australia, France, Germany, Italy, South Korea, the Czech Republic, Switzerland, Finland and Spain.[30]" The event showcased "intelligent unmanned equipment" for law enforcement, police robots "equipped with intelligent analysis and autonomous decision-making capabilities," and the "Police Hongmeng Operating System (PHOS, 警鸿操作系统)," a specialized version of Huawei's HarmonyOS platform intended for use by law enforcement for "public security prevention and control."[31] A police officer with the PRC Ministry of Public Security's First Research Institute commented that one of the advantages of the Police-Harmony OS was not just its ability to do real-time data integration across a range of traditional and intelligent police equipment, but the fact that the equipment involved used domestically-produced chips, which the official assessed as improving data security and "ensuring the reliability and confidentiality of public security operations."[32]

Finally, exports of surveillance technology and police equipment exist alongside China's growing arms exports. As Custer notes,[33] between 1995 and 2024, Beijing moved from being one of the largest recipients of global arms transfers to becoming a major supplier, though it still falls below the United States.[34] PRC exporters are particularly important in the global market for dual-use technologies, such as drones that have both military and commercial applications.

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[29] Eastern Communications,"东□ □ □ □ □ 连□ □ □ □ □ □ □ □ □ □ 备□ □ □ 现5G+□ 网□ □ 创□ 实□ [Eastern Communications appeared at the Lianyungang Public Security Technology Equipment Exhibition, demonstrating its innovative strength in 5G+ multi-network integration]," 13 September 2024, https://finance.sina.com.cn/roll/2024-09-13/doc-incnzmik8909824.shtml

[30] Deng Xiaoci, "Ministry of Public Security to stage 12th Police Expo, featuring AI+ robots," *Global Times,* 12 May 2025, https://www.globaltimes.cn/page/202505/1333863.shtml

[31] On use of the Harmony OS for law enforcement, see https://www.harmony-developers.com/p/the-mobile-police-terminal-based

[32] Deng Xiaoci, "China International Exhibition on Police Equipment kicks off in Beijing, with robots, AI products in focus," *People's Daily/Global Times,* 15 May 2025, https://en.people.cn/n3/2025/0515/c90000-20315274.html

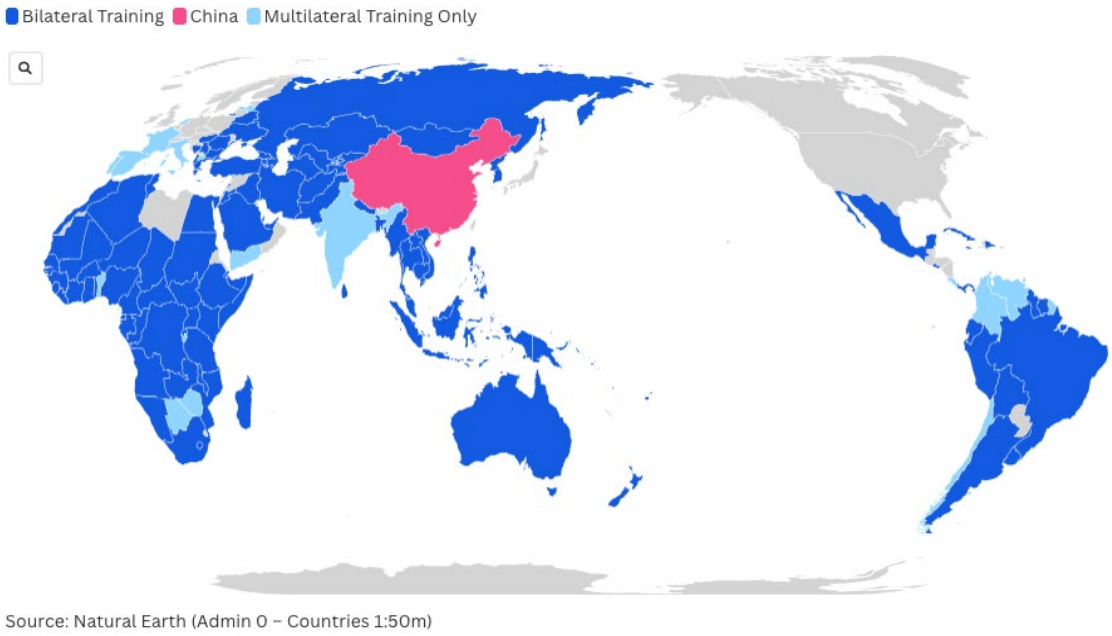
[33] See Custer, this volume.

[34] Manoj Kewalramani and Anushka Saxena, "Inside China's 'Low Cost' Arms Exports Serving Everyone from Pak to West Africa," *NDTV*, 17 June 2025, https://www.ndtv.com/opinion/inside-chinas-low-cost-arms-exports-industry-serving-everyone-from-pak-to-west-africa-8687911

Provision of Police and Law Enforcement Training

Finally, the PRC engages in police training. Like China's export of surveillance technology and police equipment, this activity has earlier roots: China began training peacekeeping police through its participation in United Nations peacekeeping missions.[35] Since then, a range of actors in the PRC have provided police trainings to counterparts in countries around the world. Recipients of China's police training are shown in Figure 3:

Figure 3: Foreign Police Trainings by PRC Ministries, Universities, and Companies (2000-Present)[36]



These programs are increasingly deployed in parallel with high-level security diplomacy and security technology offerings. In 2022, Xi Jinping offered to train 2,000 police and security officials in a speech at the Shanghai Cooperation Organization.[37] At the GPSCF in 2024, MPS Wang Xiaohong announced

[35] "Over 2,600 Chinese Peacekeeping Police Officers Sent to 4 Continents: Official," *Xinhua* (website), 10 September 2021, http://www.news.cn/english/2021-09/10/c_1310180173.htm

[36] Figure from Chestnut Greitens, Kardon, and Waltz, "China's Internal Security Training Dataset," forthcoming.

[37] *Reuters*, "China's Xi Urges Russia and Other Countries to Work at Preventing 'Colour Revolutions,'" *Reuters (website),* 16 September 2022, https://www.reuters.com/world/asia-pacific/chinas-xi-says-china-will-help-train-law-enforcement-personnel-sco-countries-2022-09-16/

that the PRC would provide police and law enforcement training to 3,000 officials from countries around the world in the coming year.[38]

China's law enforcement trainings also exist alongside the presence of Chinese Private Security Companies (PSCs) abroad, many of which are staffed by former military or law enforcement officials. Chinese PSCs have had an expanding presence, for example, in Central Asia, where they play varied roles across the region depending on local legal, political, and market constraints.[39] In Pakistan, attacks on Chinese nationals and presence have led to Chinese officials pressing for a joint security mechanism;[40] facing similar pressures, the military regime in Myanmar passed a law allowing the operation of Chinese security firms inside the country.[41] Today, an estimated 20 to 40 Chinese PSCs operate overseas, primarily for the protection of Chinese personnel, facilities, and projects.[42]

Why China's Role as a Security Provider Matters

The above section documented the breadth and nature of China's emerging role in global security assistance and cooperation. Jon Finer, who served as Deputy National Security Advisor under President Biden, notes that this is a major shift in the global security landscape. Security assistance, he observes, was, "for a long time, [something] that the United States almost uniquely offered to our partners in the world…. We've almost had a monopoly on this tool for advancing our interests really since the end of the Cold War." Today, however, "this is increasingly a contested space."[43] As a result of China's expanding activities in this domain, a growing number of governments can pursue security cooperation with the United States and the PRC simultaneously, focusing on different areas of emphasis and gaining distinct types of security cooperation from each. If countries desire both types

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[38] Wang Qingyun, "Police Training Offered to Enhance Intl Cooperation," *China Daily,* 10 September 2024, https://www.chinadaily.com.cn/a/202409/10/WS66df9b92a3103711928a70bf.html

[39] Odil Gafarov, "Boots on the Ground: What Chinese Private Security Companies do in Central Asia," *Carnegie Endowment for International Peace*, 1 August 2024, https://carnegieendowment.org/posts/2024/07/china-private-security-central-asia?lang=en

[40] *Dawn,* "Beijing pushing Islamabad on joint security plan to protect its citizens," 13 November 2024, https://www.dawn.com/news/1872071.

[41] Maung Kavi, "Junta Passes Law Allowing Chinese Security Firms to Operate in Myanmar," The Irrawaddy, 19 February 2025, https://www.irrawaddy.com/news/myanmar-china-watch/junta-passes-law-allowing-chinese-security-firms-to-operate-in-myanmar.html#google_vignette

[42] Hu Xinyue, *Forays Beyond Home Grounds: Challenges Facing Chinese Private Security Companies in Myanmar,* Singapore: S. Rajaratnam School of International Studies, 4 June 2025, https://rsis.edu.sg/rsis-publication/idss/ip25062-forays-beyond-home-grounds-challenges-facing-chinese-private-security-companies-in-myanmar/

[43] Irregular Warfare Initiative [IWI], "Security Hybridization: U.S., China, and the Future of Global Security Assistance," *Irregular Warfare Podcast,* 10 July 2025, https://irregularwarfare.org/podcasts/security-hybridization-u-s-china-and-the-future-of-global-security-assistance/

of assistance, they increasingly have the option to meet those demands by enlisting two different great power security partners. Neither China nor the United States demands exclusivity across the internal/external security spectrum, given that each is comparatively weak at the type of security at which the other excels, so third countries are not (yet) "forced to choose." The United States has not adequately accounted for the global weight of China's emerging security cooperation, in part because a significant part of it is non-military in character; the Pentagon's annual report on military and security developments involving the PRC, for example, devotes very limited attention to the non-military dimensions of China's security cooperation, despite the fact that this outreach matches the scale and scope of China's military diplomacy worldwide.[44]

The example of Vietnam, perhaps more than any other, exemplifies the challenges and concerns that this phenomenon can raise for American foreign policy and national security.[45] The United States has worked assiduously over consecutive administrations to expand its defense relationship with Vietnam; this has principally meant the U.S. Department of Defense working with the Vietnamese Ministry of National Defense to strengthen maritime capabilities and counter Chinese activities in the South China Sea. At the same time, Vietnam's internal security apparatus – led until recently by Tô Lâm, who has since become Vietnam's most senior Communist Party official – has actively built up its own cooperation with Beijing. These interactions are aimed, explicitly, at combating the threat of "color revolutions" and protecting regime security to "keep the red flag of socialism flying."[46] The dense web of ministerial-level interactions between Hanoi and Beijing far outstrip Hanoi's interactions with Washington, in both seniority and frequency.[47] During Xi Jinping's most recent state visit to Vietnam in April 2025 (his fourth since 2013), and despite ongoing tensions in the South China Sea, Tô Lâm discussed Hanoi's interests in strengthening defense and security ties with Beijing, and expanded security cooperation was one of areas prominently discussed in Chinese state media coverage of Xi's previous state visit, in December 2023.[48] Similar developments have occurred around the world, from police patrols in Hungary to law enforcement assistance in the Pacific

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[44] Chestnut Greitens, Kardon, and Waltz, *A New Cop on the Beat.*

[45] Sheena Chestnut Greitens and Isaac Kardon, "Refusing to Choose: Vietnam's Security Strategy under US-China Competition," *Foreign Policy* (Jan. 2025).

[46] State Council, PRC, "中华人民共和国和越南社会主义共和国关于进一步深化和提升全面战略合作伙伴关系、构建具有战略意义的中越命运共同体的联合声明 [Joint statement of the PRC and SVN on further deepening and enhancing the comprehensive strategic cooperative partnership and building a shared China-Vietnam community with a shared future]," *Xinhua*, 13 December 2023, https://www.gov.cn/yaowen/liebiao/202312/content_6920159.htm

[47] Chestnut Greitens and Kardon, "Security Without Exclusivity."

[48] "Vietnam's party chief wants enhanced defence, security, connectivity with China," *Reuters*, 13 April 2025, https://www.reuters.com/world/asia-pacific/vietnams-party-chief-wants-enhanced-defence-security-connectivity-with-china-2025-04-14/; *Xinhua*, "Key Takeaways from Xi's State Visit to Vietnam," *China Daily,* 15 December 2023, https://www.chinadaily.com.cn/a/202312/15/WS657bdafda31040ac301a7fcf.html

Islands to the recent launch of a Strategic Police Dialogue between China and the United Arab Emirates.

Implications for U.S. Security Assistance: Choices for Policymakers

This development raises important questions for the future of American security assistance programs as the United States moves to focus its national defense and national security strategies on strategic competition with China as the central pacing challenge. China's emergence as a global security provider brings several implications and questions to the fore, as security cooperation has become a contested arena of geopolitical competition and global governance. A 2024 report issued by the U.S. State Department's International Security Advisory Board concluded that the United States faces "hard choices and conflicting priorities" as it tries to deploy security assistance as a tool in strategic competition.[49] Why should policymakers, strategists, and practitioners who work on security cooperation and security force assistance care about who the PRC does security cooperation with, and how? What questions and choices does this development place before policymakers?

First, American policymakers must view these developments through the broader lens of a global, but asymmetric, security competition between the United States and the PRC. China's provision of internal security assistance allows it to expand its presence, partnerships, and influence across the Indo-Pacific and beyond. China has used police and law enforcement outreach to build a security presence and security partnerships in a wide range of places, including those that have defense relationships with the United States and therefore might not be willing to engage in certain forms of military-centric cooperation with the PRC, such as hosting a naval base.[50]

Such outreach can provide the PRC with several benefits. First, establishing a security presence, or simply engaging in conversations about potential security assistance, provides the PRC an opportunity to enhance its domain awareness and facilitate intelligence activities about a given country's security environment and Chinese interests therein: how its leaders see local infrastructure, social dynamics, and security threats. Second, these activities also build relationships with important parts of recipient governments – the security ministries. Where assistance occurs, it can provide resources that many leaders care deeply about: tools to secure their political survival and their hold on power. The relationship between security presence or assistance and broader political influence has always been a difficult one to assess with high confidence, but if the United States does not accurately understand where, to what degree, and how there is a parallel Chinese security presence and

[49] International Security Advisory Board [ISAB], *The Limits of Influence: U.S. Security Cooperation in an Age of Strategic Competition* (Washington, DC: U.S. Department of State, September 2024).

[50] Irregular Warfare Initiative, "Security Hybridization."

asymmetric competition, it runs the risk of overestimating its influence and leverage in a wide range of important bilateral relationships.

Second, the asymmetry of China's security outreach and the resulting "security hybridization" that is occurring – in which the U.S. and China both provide different types of security assistance to the same recipient – has important policy implications, including for political stability and political risk. To date, the United States has, in limited cases, been able to place bounds on PRC military presence in places where that would directly impact American military presence or operations (IWI 2025). This is, however, a very different global security environment overall than created under conditions of US-Soviet rivalry during the Cold War. During the Cold War's bipolar competition, Washington and Moscow simultaneously provided both internal and external security to client states on their respective sides of the Cold War divide. Today, in contrast, because each great power is comparatively weaker at providing the kind of assistance at which the other excels, exclusivity is difficult and countries can seek what former CIA Director William Burns memorably termed "non-monogamous" security relationships with both Washington and Beijing.[51]

This means where the United States military and other government actors are present to advance American interests, whether through a security presence or other footprint, they may find themselves operating in an environment that is also shaped by PRC presence, whether digital/technological or security presence. U.S. forces may also end up providing funding, training, and support to a country's military, while China provides support, equipment, and training to its domestic security services. This kind of parallel presence can exacerbate potential counterintelligence and operational security risks. Moreover, studies from comparative politics demonstrate that counterbalancing among rival security forces in autocracies or other weakly institutionalized political systems can heighten internal instability and affect coup risk,[52] making political instability more likely in a place where the United States has important interests at stake. Increasing security force overlap could also heighten localized competition between the two great powers, and increase the risk of conflict, especially – under these circumstances – irregular conflict and competition.[53] To accurately assess and manage these risks for the long-term, the United States must track the existence and assess the effects of overlapping security assistance.

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[51] William J. Burns, "Spycraft and Statecraft: Transforming the CIA for an Age of Competition," *Foreign Affairs,* 30 January 2024, https://www.foreignaffairs.com/united-states/cia-spycraft-andstatecraft-william-burns

[52] Erica DeBruin, *How to Prevent a Coup d'Etat: Counterbalancing and Regime Survival* (Cornell University Press, 2020).

[53] Alexandra Chincilla, Kyle Atwell, Alexis Bradstreet, Catherine Crombe, and Luther Leblanc, "Irregular Warfare and Strategic Competition," *Defence Studies*, 2023.

Third, China's emergence as a security provider may shape the global distribution of democracy and authoritarianism in ways that change how the U.S. assesses where it is feasible and worthwhile to provide its own forms of security assistance. Current and potential recipients of Chinese security assistance fall on a spectrum defined by two poles: 1) governments that seek PRC security assistance to copy its authoritarian control mechanisms and become more effective dictators themselves, and 2) governments whose leaders are not necessarily motivated by autocratic ambitions, but nonetheless seek out Chinese assistance because it provides a means to solve genuine governance and public safety problems. The first group presents a very different policy challenge, and has a more constrained set of potential policy solutions, than the second; that policy challenge is compounded by the risk that a country in the latter category could suffer democratic backsliding or an unanticipated autocratic reversal, meaning that analysts and decision-makers cannot assume that a country will always stay one "type" or another.

The United States should therefore be cautious – on strategic, moral, and legal grounds – about trying to outcompete China to strengthen the coercive capacity of a potential authoritarian or repressive government. Such assistance has, in the past, created blowback that generated friction once American partners or allies subsequently democratized (as happened in South Korea and the Philippines) – backlash that contributed to a significant scaling back of American foreign internal defense efforts. Moreover, providing such assistance may actually enhance the kind of "linkage," or density of ties to Western democracies, that is historically associated with democratization.[54] What this means is that greater US security involvement and assistance in a recipient country without strong democratic institutions may actually generate pressure within that society for expansion of political freedom and liberalization of governing institutions – the kind of internal threat of "color revolutions" that Beijing promises to provide security assistance to help its partners counter.[55] While scholars will note that the association between American security assistance and democratization has not always materialized, and in some countries has even produced opposite effects,[56] the risk of foreign pro-democracy subversion and "color revolution" nonetheless looms large in the threat perception of many authoritarian regimes. This raises the possibility that the US providing security assistance to such regimes will not reduce their perceived need for Chinese assistance, but amplify and increase it, creating the risk of a competitive spiral.

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[54] Steven Levitsky and Lucan Way, "International Linkage and Democratization," *Journal of Democracy* (2005).

[55] *Reuters*, "China's Xi Urges Russia and Other Countries to Work at Preventing 'Colour Revolutions,'" *Reuters (website),* 16 September 2022, https://www.reuters.com/world/asia-pacific/chinas-xi-says-china-will-help-train-law-enforcement-personnel-sco-countries-2022-09-16/; *Voice of America,* "China's Xi Says 'Color Revolutions' Must Be Prevented," 16 September 2022, https://www.voanews.com/a/china-xi-says-color-revolutions-must-be-prevented/6750450.html

[56] Adam Casey, *Up in Arms: How Military Aid Stabilizes – and Destabilizes – Foreign Autocrats* (Basic Books, 2024).

The other category of potential recipients of Chinese security assistance is a set of weakly governed polities without autocratic ambitions, but also lacking in strong state capacity. Leaders in these places may find China's domestic and non-traditional security assistance appealing for a different set of reasons: not because they aim to undermine democracy, but because they see no other viable method to strengthen the state's monopoly on force within its territory to achieve greater public safety for citizens – a legitimate goal for democratically elected leaders. In this case, China's assistance is meeting a genuine need and filling a gap in public goods provision, and sometimes one that the US and its partners have not fully or effectively met; the Chinese political system is also at times able to deploy that assistance faster and in a more targeted fashion than other potential providers. In these cases, pressure to reject China's offers of security assistance, unless a comparable substitute is offered, is likely to be ineffective or poorly received.

Chinese security assistance to such countries nonetheless has two potential downsides that should be accounted for in America's strategic calculus. First, increased Chinese assistance may diminish overall American or allied/partner influence in these places, which may matter for other American priorities in the region later, in ways that are not always fully predictable when a security assistance decision is made. Second, this group of recipients may be at risk of democratic erosion, autocratization, or increased human rights violations if proper institutional safeguards -- surveillance oversight, instantiation of democratic/rule-of-law policing norms, etc. -- are not put into place. There is, as yet, no systematic cross-national data enabling scholars or policymakers to predict the effects of Chinese security assistance on a given recipient state. To the extent that those outcomes that remains a priority for the United States in the emerging era of great power competition, the possibility of these secondary effects should be factored into policy decisions. It will be important for policymakers in Washington to identify which countries pursue security assistance from China because their leaders seek to erode democratic constraints, and which seek Chinese security assistance for more legitimate reasons, as the two groups demand different policy solutions and approaches to security force assistance. Who makes these determinations, based on what criteria, and how they factor into decisions about security assistance, will require an interagency assessment and decision process that should be carefully designed.

The goal of American security force assistance programs should not be to symmetrically mirror, match, or outbid the PRC in every case where Beijing is providing internal security assistance. Rather, the United States should figure out where and how using security cooperation and security force assistance can advance American national security priorities: where it matters most to do so, and where providing security assistance is likely to be an effective method of advancing American interests.[57] This calculus, in turn, will have to be embedded in a broader set of American strategic

[57] As the ISAB (2024) report notes, the United States currently lacks a clear standard for measuring the success of its own security assistance, let alone assessing whether Chinese and Russian efforts are succeeding, and by what standard.

tradeoffs that acknowledge a myriad of challenges that emerge and evolve in a world of finite American attention and resources.

Recommendations:

1. Develop a systematic mapping of China's security cooperation and security assistance worldwide, layered alongside existing assessments of PLA military diplomacy and cooperation activities. This data should be used to identify U.S. priorities in an era of strategic competition, and to specify *ex ante* the potential role, purpose, and efficacy of proposed American security assistance.
2. Develop more rigorous criteria to measure and assess the efficacy of American security force assistance, and corresponding metrics to assess the success of Chinese (and Russian) security assistance activities.
3. Separate high-priority potential recipients of Chinese security assistance into two groups: those that are interested for autocratic purposes, and those that are interested due to legitimate gaps in public safety capacity, in order to develop separate plans of action for each group.
4. Identify potential recipient countries where American allies/partners may be better placed to lead on police and civilian security cooperation and assistance programs (Australia in the Pacific Islands, Japan in Southeast Asia, South Korea in Latin America, etc.).
5. Develop an interagency process for strategic assessment of American security cooperation that integrates the various actors involved in foreign security cooperation across the civilian/law enforcement and military domains (including in particular the security cooperation activities carried out by the Department of Defense and Department of State under Title 10 and Title 22 authorities).

Questions for Forum Discussion:

1. To what extent (and why) is expansion of Chinese security assistance a threat to U.S. interests? Are there areas in which the U.S. can accept, or welcome, China providing some global or regional public security goods that complement rather than challenge American interests?
2. How feasible is it to try to limit the expansion of China's efforts in these areas? Where?
3. Should the U.S. simply become much more selective in its provision of security assistance? If so, what should the criteria and threshold for providing that assistance become?
4. Can the U.S. and its allies/partners communicate more effectively about the risks of Chinese security assistance? If so, how? What other measures, such as increasing the speed of US provision of security assistance, would make American offerings more competitive in places where they would advance U.S. interests?
5. For cases where recipients of Chinese security assistance seem clearly motivated by repressive and authoritarian goals, how should the United States formulate security assistance policy? What, if any, security force assistance should the U.S. offer that is consistent with American legal and moral obligations, as well as long-term strategic interests?
6. For cases where recipients of Chinese security assistance may not be motivated by a desire to strengthen autocratic rule, but might simply want solutions for genuine public security and safety problems, how should the United States prioritize and design assistance programs? How should it engage allies and partners – and what are the circumstances under which they might actually be better placed to take the lead?
7. How should the interagency process for security force assistance be re-designed to keep American strengths in existing SFA, but provide some assistance in the non-traditional security arena where the DoD may not be the best lead actor? How should the United States organize an effective division of labor with key allies and partners in this space?

Background Research - Paper 4

Gates Forum IV

Russian Security Assistance in Great Power Competition

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October 2025

Robert M. Gates Global Policy Center

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Executive Summary

Russia's successful expansion of its security assistance relationships is a consequence of the vacuum created by U.S. deliberate disengagement from some theatres, U.S. perceived failures to generate outcomes favourable to partner forces after protracted engagement, and increased Russian efforts to make a competitive offer. Russia has succeeded in spreading a narrative that the U.S. does not respect the sovereignty of partner states, and has used that to enable what partners want to do so that they switch security providers. Once Russia has established a presence it uses a number of methods to cement partner alignment, including the economic isolation of the territory, the political capture of the state's elites, and the use of foreign military sales to build institutional dependence. Countering Russia's growing security assistance must be grounded by refocussing U.S. approaches in those states where it wishes to compete on outcomes rather than process. To pursue outcomes away from the main effort Washington will have to better empower its representatives in country. The U.S. also needs to look to make its provision of security assistance more tailored to partner needs. There is also the leeway to be more confrontational in denying Russia access to theatres of operation. Such measures, however, are only likely to succeed if states see the U.S. as a reliable security partner. A more transactional approach may actually prove more effective, but at present few states have confidence that the U.S. will adhere to agreements it has made. Effective operational execution must have firm strategic foundations.

Introduction

The intensification of great power competition over the last decade has seen a transformation of the approach to security assistance by the United States, and the breadth of security assistance extended by the Russian Federation. For much of the unipolar era, the U.S. pursued an incredibly wide set of security assistance programmes. These programmes enabled the U.S. to maintain presence, relationships, and therefore access in many countries, were an avenue for promoting U.S. values in key states and was a way of upskilling the U.S. military by keeping them deployed and engaged with operational problems.[1]

The erosion of U.S. conventional supremacy and transition to an era of multipolarity has forced the U.S. to reduce the breadth of its security assistance and concentrate on key partners.[2] This has ceded ground to Russia and others who are now actively using security assistance as a way of displacing the U.S. from some states. At the same time, however, it is evident that in some areas the transition from western to Russian security assistance – for example in Mali, Burkina Faso and Niger – is partly reflective of Western failures, rather than Western or Russian strategy.[3]

This complicates analysis of the competitive balance, because it is necessary to determine where a shift in security assistance provision has been caused by a deliberate retrenchment by the United States and its allies, by effective competition by Russia, or by a failure of U.S. security assistance. Were it simply a question of categorising which states fall into which category that would be analytically simple. Instead, all three dynamics are often at play in each instance of a realignment of security assistance provision.

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[1] For an overview of the associated dynamics and issues consider, Tom Watts and Rubrick Biegon, 'Defining Remote Warfare: Security Cooperation', *Remote Warfare Programme*, no. 1 (2017): https://www.saferworld-global.org/resources/publications/1306-defining-remote-warfare-security-cooperation-by-rubrick-biegon-and-tom-watts, accessed 10 August 2025.

[2] A requirement strongly advocated by the current Undersecretary of Defense for Policy, Elbridge Colby, *The Strategy of Denial: American Defense in an Age of Great Power Conflict* (New Haven: Yale University Press, 2021).

[3] Jack Watling and Nina Wilén, 'Assessing the Causes of Strategic Realignment in Sahelian States', *The RUSI Journal*, vol. 169, no. 4 (2024), pp. 64–77.

This paper seeks to outline three things: how the Russian Federation is framing its offer relative to the United States and its allies, how the Russian Federation approaches the delivery of security assistance, and where the U.S. can consider strengthening its approach to security assistance in a resource constrained environment. The paper also addresses areas of Russian security cooperation that revolve around capability provision and are fundamentally different in character. The evidence for this paper is drawn widely from fieldwork in countries that have realigned, interviews and interactions with U.S. and allied forces responsible for security assistance in several countries, reviews of both Russian and recipients of security assistance public statements, and of non-public Russian documentation on security assistance programmes.

Dislodging the West

Russia defines itself as a great power: that is a state whose interests must be taken into consideration on any issue, primarily because of their ability to disrupt any solution if their interests are not met.[4] Russia's strategic ambition for such a status is premised on the ability to disrupt the interests of rival great powers internationally in order to maintain a way of imposing costs should a rival impinge upon its near abroad, or direct sphere of influence, which it defines as those states that if under the influence of a rival would pose a direct threat to the stability of its borders. It has not usually provided a values-based justification for this position; though Russia does discuss defending 'traditional values' this is not usually maintained as the foremost justification of policy. President Vladimir Putin has instead pushed an interests based justification of Russian policy, premised on a view that the world should see power lie with those who have natural resources, rather than those who profit from intangible services. This is both a pitch to poorer countries with less developed economies, but also a view that Russia can build leverage over its adversaries in Europe and North America, and influence in Beijing, by building relationships with states that have natural resources and therefore can disrupt the supply chains of industrial and service oriented economies.[5] It is important to note here that while Russia's securing access to natural resources is complementary to Beijing's need to protect its supply chains – and thus there is often some cooperation in security assistance between Russia and China – Russian officials see the provision of security assistance as a means of controlling access to natural resources and thereby making Russia indispensable to, and thereby maintain leverage over, Beijing. There is, therefore, also a competitive dynamic at work.[6] Russia therefore sees a strategic advantage in having relationships and presence worldwide.

The United States also espouses its right to assert its interests internationally. Unlike Russia, however, the U.S. has generally justified this by reference to a framework of laws, conventions, and moral assertions that it defines as an 'international rules-based system'. In many cases the need for consistency with this 'rules-based order' has imposed constraints upon the U.S. Russia, however, emphasises those areas where the U.S. reinterprets or applies its obligations inconsistently. For example, Russia contrasts the condemnation of Russia's annexation of Crimea with the U.S.'s recognition of Israel's annexation of the Golan heights.[7] Russian diplomats contrast the U.S. and

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[4] Cristian Nitoiu, 'Aspirations to Great Power Status: Russia's Path to Assertiveness in the International Arena Under Putin', Political Studies Review (Vol. 15, No. 1, February 2017), pp. 39–48; Jeffrey Mankoff, Russian Foreign Policy: The Return of Great Power Politics (Lanham, MD: Rowman and Littlefield Publishers, 2012), p. 12.

[5] Vladimir Putin, 'St Petersburg International Economic Forum Plenary session', 17 June 2022: http://en.kremlin.ru/events/president/news/68669, accessed 10 August 2025.

[6] This is not something the Russians emphasise publicly, but internal Russian documents discussing security assistance see Chinese provision of security assistance as a threat, and Russian provision of it as securing interests relative to Beijing.

[7] President Obama, 'Statement by the President on Ukraine', The White House, 20 March 20114: https://obamawhitehouse.archives.gov/the-press-office/2014/03/20/statement-

Europe's attempts to rally the world to defend Ukraine, including on the basis of humanitarian considerations, with their near silence on wars in Sudan and Ethiopia and lack of condemnation of Israel on humanitarian grounds over its operations in Gaza.[8] The narrative that Russia pushes therefore is that Russia's interests may differ from another state's but that is a bilateral issue. Russia asserts that the U.S., by contrast, will wield its multilateral influence to justify what is actually the selective pursuit of its interests, and that while the U.S. may be highly prescriptive as regards the laws and conduct of the governments it offers assistance to, its own policies are often motivated by racism.

Framing Western security assistance as fundamentally hypocritical is the first step in Russia's drive to convince security partners that the West is also ineffective. There are two lines of argument made here. First, Russian representatives argue that the drive for alignment with the international rules-based order, as a cover for selectively pushing U.S. interests, is in fact a means to interfere with the sovereignty of its partners.[9] It is even suggested that the U.S. is often more interested in this right to interfere with how a state functions than in addressing the security threat that is the ostensible reason for the presence of U.S. forces. In other words, the U.S. may perpetuate a security problem to maintain its presence.[10] Russian diplomats offer the deteriorating security situation in many of the states that have been recipients of U.S. security assistance as evidence of this. There is also sometimes an attraction to this narrative among political leaders receiving security assistance if they have worked with the U.S. for a long time and the challenges facing their country have not subsided. Suggesting that the U.S. is a cause of the problem allows them to shift responsibility for failure from themselves in the eyes of their domestic constituents.[11]

Second, the Russians frame the United States and its partners as unreliable. The argument boils down to the proposition that democratic government leads to instability in policy and so it is only a matter of time before a partner becomes a burden in the eyes of the U.S. government or the U.S. electorate. Moreover, the Russians argue that when a partner stops being submissive to U.S. interests, the U.S. will happily leverage the population in the country to oust them from power. The Russians for example contrast the U.S. demand that President Hosni Mubarak leave office with their defence of President Bashar al Assad, or for example the U.S. turning against Prime Minister Maliki in Iraq and President Karzai in Afghanistan. The Russians argue that they stick with their

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president-ukraine, accessed 10 August 2025; US Embassy in Israel, 'Proclamation on Recognizing the Golan Heights as Part of the State of Israel', 27 March 2019: https://il.usembassy.gov/proclamation-on-recognizing-the-golan-heights-as-part-of-the-state-of-israel/, accessed 10 August 2025.

[8] 'Russia condemns Israel's plan to expand Gaza operation', Reuters, 9 August 2025: https://www.reuters.com/world/middle-east/russia-condemns-israels-plan-expand-gaza-operation-2025-08-09/, accessed 10 August 2025; Anthony Zurcher, 'US shrugs off Gaza escalation - drifting further away from allies', BBC, 9 August 2025: https://www.bbc.co.uk/news/articles/cn92je014dyo, accessed 10 August 2025.

[9] This arises from the US pushing a Security Sector Reform agenda through Security Assistance, see, Patricia Sullivan, Lethal aid and human security: The effects of US security assistance on civilian harm in low- and middle-income countries, Conflict Management and Peace Science, vol. 40, no. 5 (2023), pp. 467-488; Max Margulies and Rachel Metz, 'Issue linkage in security assistance: A pathway to recipient security sector reform', Journal of Strategic Studies (2024), pp. 1–24.

[10] Valery Gerasimov, 'Tsennost' nauki v predvidenii' ['The Value of Science in Prediction'], VPK (Vol. 476, No. 8, 2013), <https://vpk-news.ru/sites/default/files/pdf/VPK_08_476.pdf>, accessed 8 August 2025.

[11] Thomas Durrell-Young, 'The "Politics" of Security Cooperation and Security Assistance', Joint Forces Quarterly, vol. 98, no. 3 (2020), pp. 60-67.

people, and in cases like Assad's where his own shortcomings led to the collapse of his armed forces despite Russian support, he was nevertheless evacuated and given sanctuary. Given that Russia pitches these narratives at elites, this example can still sound attractive.[12]

The critiques of U.S. security assistance above often project Russian practices onto the U.S. and are in some ways contradictory. Nevertheless, because Russia is at present often trying to displace the United States as a long-term security assistance provider, the targets for these narratives rarely have a clear picture of Russian practices with which to compare and contrast with the U.S. They certainly have deep and long-term frustrations with the U.S. Moreover, if Russia exaggerates U.S. malignity, these messages land because they are derived from valid criticisms of U.S. behaviour that resonates with target audiences. It is also worth noting that especially in Africa, South America, and Central Asia, the lived experience or corporate memory of Russia that sits within bureaucracies is of the late Soviet Union and is often quite positive. Many senior civil servants in these countries were educated at Soviet universities and have a romanticised memory of Soviet support to their states during the late Cold War.[13]

A final important point is that the frustration that has led states to move away from U.S. security assistance was a phenomenon before the election of President Donald Trump. The exact impact of the Trump Administration's approach on U.S. security assistance relationships is not yet fully clear. In one sense, President Trump's articulation of why the U.S. pursues its foreign policy aligns much more closely with Russia's framing of great power self-interest. In some respects, this reduces the bite of accusations of hypocrisy. The problem is that many populations aspired to a rules based order and so the U.S. has also in many respects abandoned its unique selling point. It is also evident that the unpredictability of the Trump Administration and its propensity to pursue contradictory policies on different files – arguing that it saw South East Asian nations as critical security partners before hitting them with massive tariffs – means that many states will be wary of increasing their dependence on the United States. The threat of withdrawal of U.S. military-technical assistance to Ukraine similarly both limits the differentiation with Russia and will make states wary of increasing exposure to U.S. defence industry. Russia can exploit this mistrust. Russia is seeding these narratives on fertile ground. But to reap such a harvest Russia must also have a proposition for what it can do in place of the United States and its partners.

The Russian Model of Security Assistance

The Russian approach to security assistance has both a long pedigree dating back to the revolutionary warfare conceptualised by the GRU in the two decades following the Russian Revolution,[14] and a recent history of experimentation and refinement. There is something of a division in the literature between those who have studied Russia's expeditionary activities – like those of the Wagner Group – and looked back from this organisation towards the Russian state,[15]

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[12] Øysten Rolandsen and Kjetil Selvik, 'Disposable rebels: US military assistance to insurgents in the Syrian war' Mediterranean Politics, vol. 29, no. 4 (2023), pp. 528–549.
[13] See Samuel Ramani, *Russia in Africa: Resurgent Great Power or Bellicose Pretender?* (London: Hurt, 2023).
[14] Philip Anulov, Вооруженное восстание [Armed Uprising] (Military–Political Academy, Department of Civil War, 1930); A Yu Neuberg, Вооружённое восстание [Armed Uprising] (Moscow: Sotsekgiz Publishing House, 1931); P A Karatygin, Партизанство. Начальный опыт тактического исследования [Guerilla Warfare: Initial Experience of Tactical Research], 1924; M A Drobov, Малая война: партизанство и диверсии [Small War: Guerilla Warfare and Sabotage] (State Military Publishing House, 1931).
[15] Foremost among these would be John Lechner, *Death Is Our Business: Russian Mercenaries and the New Era of Private Warfare* (London: Bloomsbury, 2025).

and those who have long studied the Russian Special Services and worked outwards towards its affiliated organisations like Wagner. Those who have studied Wagner and worked back have often endeavoured to establish contact with members of the group and have inferred a high degree of independence from the Russian state in its activities, especially among lower level personnel who have been easier to access. There is a corresponding tendency to frame their activities as opportunistic and lacking a consistent strategy.[16] Those who have studied the Russian Special Services by contrast have seen Wagner as a fairly typical – if disproportionately successful – example of precisely how the Russian Special Services runs and coordinates operations, with a consistent strategic approach implemented opportunistically. Personally, I sit in the latter school.[17] The former often provides a better empirical description of what has occurred but struggles to predict Russian activity in the future. The latter often provides an overly structured description of Russian operations but has provided a consistent means of predicting future activities. The debate has to some extent been overtaken by events after the direct takeover of Wagner by the GRU in response to a mutiny led by Yevgeny Prigozhin. Rather than tracing the history of post Soviet security assistance, therefore, this paper will endeavour to outline how the Russians approach these activities at the time of writing. In practice, the exact approach will vary depending on the prospective partner and the history of relations Russia has with the country. Nevertheless, after the mutiny by Wagner troops in June 2023 Russia has internally articulated a general approach that has consistent characteristics.

The initial pitch made to prospective partners is that the Russians recognise their security challenges and their frustrations with what their existing partners will not allow them to do.[18] The usual offer is for some form of force package that rather than operating independently from the partner at the strategic level, adjacent to the partner operationally, and trying to direct partner operations tactically, will subordinate itself to the partner's tactical and operational decision making, to enable their preferred strategy. The pattern of deployment has also become somewhat consistent. An airfield is selected as an operating base. GRU personnel arrive and begin to become liaison officers in the partner's units. A tactical group of forces is built up for the partner to employ. This generally includes a core contingent of infantry and reconnaissance troops supported by artillery, aviation, electronic warfare, and sometimes air defence. The subordination of these elements to the partner's operational plan and the comfort with casualties among the Russian contingent are used to emphasise that Russia enables the partner's sovereign decision making rather than supplanting it. Nor does Russia demand any exclusivity in the partner's relationship; they do not object to the partner maintaining troops from other countries close by. Indeed, they are open to integrating other partner forces into operations, as they did with Hezbollah and Iranian units in Syria.

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[16] Mark Galeotti emphasises the combination of entrepreneurialism with Putin's opportunistic and risk averse decision making to suggest the Kremlin was often led by the nose. See, Mark Galeotti, *Putin's Wars: From Chechnya to Ukraine* (Oxford: Osprey Publishing, 2022), pp. 180-191; Anna Arutunyan and Mark Galeotti, *Downfall: Putin, Prigozhin, and the fight for the future of Russia* (London: Ebury, 2024).

[17] Jack Watling, Oleksandr V Danylyuk and Nick Reynolds, The Threat from Russia's Unconventional Warfare Beyond Ukraine, 2022–24, RUI, 20 February 2024: https://www.rusi.org/explore-our-research/publications/special-resources/threat-russias-unconventional-warfare-beyond-ukraine-2022-24, accessed 10 August 2025.

[18] Russia pitches itself as an enabler of sovereignty, rather than a partner expecting obligations, see Antonio Giustozzi, Dr Joana de Deus Pereira and Professor David Lewis, Did Wagner Succeed in the Eyes of its African and Middle Eastern Clients?, RUSI, 9 January 2025: https://www.rusi.org/explore-our-research/publications/whitehall-reports/did-wagner-succeed-eyes-its-african-and-middle-eastern-clients, accessed 10 August 2025.

The military structure of Russian security assistance generally comprises groupings of between 50-150 troops, who are usually employed under a single front company. This group will divide into personnel who work within partner force units, providing liaison, and the main body who will operate as a Russian unit. Further Russian capabilities are then attached around the group to include attack aviation, reconnaissance specialists, UAV operators, air defenders, and command and control capabilities. The force will also often operate in a combined platoon multiple with partner forces. Limited effort is put into training the partner. Instead, the emphasis is in getting alongside them and upskilling them on operations. An important feature of Russian security assistance operations is that they tend to increase the tempo of partner activity and the Russian forces share risk with the partner force. This results in a steady rate of Russian casualties on operations and has even seen mass casualty incidents. Interestingly the latter, whether in Syria, or Mali, have not led to a political re-evaluation of the mission.[19] Owing to the pay structure for personnel on these operations, troops tend to spend both a long time on tour and regularly return to the same combat group for multiple tours, building close relationships with individuals in the partner force, though institutional relationships often remain comparatively weak.

The question invariably arises as to how such activities are to be resourced. Russia, as many complacent officials like to point out, has an economy the size of Italy and so how can it afford to maintain multiple expeditionary campaigns? The answer is usually to establish a company or set of companies that are granted concessions by the local government. This costs the partner government nothing – up front – because rather than giving a concession to a profit-making company it gives it to a Russian-controlled corporation that then uses its profits to fund the operations. The government still receives the taxes from the enterprise and the Russians fund their operations without drawing on the budget. The Russians often encourage a partner to strip concessions from other companies. Russia also offers to provide escort to mineral convoys and other security to related infrastructure, on the basis that its companies get a monopoly to do this and so force companies from other countries to do business with them. The Russians will also propose broader favourable economic deals such as the prospect of nuclear energy projects from Rosatom, or gold refining services. The problem is that for many international companies doing business with the Russians exposes them to the risk of sanctions while Russian gold refining practices do not conform to the procedures that make activities insurable for other companies. In practice, this leads to business being deterred, coopted, and for the market to appear very risky to external investors so that the Russians become extremely influential in the economy and the state in question loses options to engage internationally. It should be emphasised that Russia often keeps the finance from these activities outside of Russia, not only to fund the direct line of effort but also to hold gold beyond the U.S. sanctions net to fund wider Special Service operations.[20]

Another feature of Russian outreach is political services to the government it is assisting. The empowerment of local leaders to pursue policies that Western partners would not endorse has tended towards methods that are not compliant with international humanitarian law. It appears evident that Russia encourages such activities, including carrying out atrocities while on operations with partner forces. This often creates short term ‘progress’ in extending government control over territory, but clearly builds up resentment and resistance in targeted communities. Russian political

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[19] Fillip Lebedev, Felix Light and Jesica Donati, ‘Exclusive: The identities of Wagner mercenaries lost in a Mali ambush revealed’, BBC, 11 September 2024: https://www.reuters.com/world/africa/wagner-lost-veteran-fighters-mali-ambush-setback-russias-africa-campaign-2024-09-11/, accessed 10 August 2025.

[20] Olivia Allison, Nick Connon, Antonio Giustozzi and James Pascall, ‘Wagner’s Business Model in Syria and Africa: Profit and Patronage’, RUSI, 6 February 2025: https://www.rusi.org/explore-our-research/publications/occasional-papers/wagners-business-model-syria-and-africa-profit-and-patronage, accessed 10 August 2025.

technologists therefore seek to help leaders to promote their strategy to their domestic population and provide security to a country's leadership. Atrocities often leave the supported government isolated from the international community, thereby extending dependence on Russia. Meanwhile, the surrounding of the leadership in a cocoon of security provided by the Russian Special Services also gives the Russians disproportionate access and leverage over decision making. It makes it practically impossible for potential Russian competitors to access the country's leadership without the Russians having access to the discussions. By offering communications solutions and supporting intelligence collection, the Russians begin to co-opt strategic planning. This is not achieved by discussing and agreeing to a shared strategy, but rather through influence of the principal's decision making.

As discussed elsewhere in this series, Western security assistance is often overwhelmingly focussed on countering external threats to the state. China has largely avoided security assistance aimed at combat operations against external groups, focussing instead on training to security bodies intend to improve a government's internal security.[21] Indeed, ideologically the West defines the ability of a government to change while the state endures to be an aspiration in itself. China and Russia do not see the state and government as separate and Russia is much more prepared that China to offer services to secure the government from external and internal threats.

The successes that Russia has had in Africa using the methods outlined above means that the Russian Special Services are investing in expanding the forces available for such operations. Under the Centre for Special Activities of the GRU, headed by Andrei Averyanov, the Russian Expeditionary Corps is becoming a constellation of small corporate entities employing combat troops and support services. There is also a more systematic approach being taken by the SVR to provide corporate structures and financing for these operations, and to map and leverage networks of local officials trained in the Soviet Union. There is currently a tension between recruitment for these activities and the demands of Russia's full-scale invasion of Ukraine. The relentless need for personnel at the front and the desire to avoid pulling troops away from the primary theatre limit the scale of expeditionary activity that can be mounted at present. But if the conflict concludes then there will be a significant pool of combat hardened manpower to be diverted to these activities. It is therefore reasonable to assume that Russia will continue to pursue these efforts. Another reason for this is that Russia perceives itself to be in competition with China and believes that having a security presence on the ground in these territories gives it leverage with China in the struggle for influence, as Beijing has so far proven more reluctant to engage in combat operations abroad.

Military Cooperation Agreements

Russian security assistance operations are generally focussed on operational outputs as a means of building strategic access and influence. The Russians also pursue Military Cooperation Agreements which are more institutionally and industrially orientated. A number of these partnerships have long legacies dating back to the Soviet Union.[22] Foremost among these are India and Algeria. The

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[21] Erik Green, Meia Nouwens and Veerle Nouwens, 'The Global Security Initiative: China's International Policing Activities', IISS, 24 October 2024: https://www.iiss.org/research-paper/2024/10/the-global-security-initiative-chinas-international-policing-activities/, accessed 10 August 2025; Ilaria Carrozza and Nicholas Marsh, 'Great Power Competition and China's Security Assistance to Africa: Arms, Training, and Influence', Journal of Global Security Studies, Volume 7, Issue 4, (2022).

[22] It is noteworthy that Russian academics and diplomats ascribe these same factors to realignment away from their interests, see Vitaly Naumkin and Vasily Kuznetsov, 'The 1973 October War and the Soviet Union', Cairo Review for Global Affairs, no. 48, (Fall 2023), pp. 79–91.

backbone of this relationship is Russian defence industry and in India's case industrial collaboration. Indeed, the relationship with India is so close that the countries have collaborated on improving systems like Russia's Onyx P-800 Coastal Defence Cruise Missile, and Russia has loaned India an Akula class Nuclear Attack Submarine.[23] These relationships may be classified as containing an element of security assistance in that they often involve capability provision, maintenance support, training engineers and operators.

The foundations of Russia's success in providing military equipment has often arisen when Western equipment was unavailable, when there was a political drive to collaborate with Russia, or a state had a requirement for a defined volume of equipment at a lower price point than could be serviced by Western countries. India, for example, does procure Western systems when it can afford them and even retrofits Russian platforms with Israeli weapons and sensors because they are more effective. Nevertheless, when one looks at the price point for Western armoured vehicles and the cost of India buying enough to replace its existing fleets, its dependency on Russian equipment is likely to persist, and thus its close political relationship with Moscow. The success of Russian aircraft sales despite their inferiority to Western systems is also reflective of both cost and maintainability. Although China may seek to displace Russia as several African and South East Asian states look to update their aircraft fleets, the Russians maintain a competitive offer, while Western aircraft struggle to make affordable offers to these markets.

Recently, Russia has been able to expand beyond these more market orientated military cooperation relationships, however. During the full-scale invasion of Ukraine Russia has expanded its military cooperation with Iran. This has seen Iranian UAV technology transferred to Russia, improved, and then returned to Iran. It has also seen collaboration on missile development and an increased tempo of Russian Special Service visits to Iran, along with assistance from Russia to Iranian proxies in Lebanon and Yemen.[24] Similar dynamics have developed with North Korea where DPRK provision of artillery ammunition and ballistic missiles, along with soldiers being sent to fight under Russian command has been reciprocated with training to DPRK troops and collaboration on missile, UAV, and satellite technology.[25] These are both likely to become significant and deep relationships over time and given Russia's higher technological capacity when compared with both countries is a concern.

Prior to the full-scale invasion of Ukraine – which it is important to note Moscow originally thought would be over in a matter of weeks – Russia was signing a range of military cooperation agreements across Africa. This policy has continued, so that between 2015 and 2025 Russia signed military cooperation agreements with 43 states.[26] At present much of this has manifested in Russia

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[23] Douglas Barrie and Viraj Solanki, 'Purchasing from a pariah: India's arms-acquisition dilemma', IISS, 22 March 2022: https://www.iiss.org/online-analysis/online-analysis/2022/03/purchasing-from-a-pariah-indias-arms-acquisition-dilemma/, accessed 25 August 2025.

[24] Julian Waller, Elizabeth Wishnick, Margaret Sparling and Michael Connell, 'The Evolving Russia-Iran Relationship: Political, Military, and Economic Dimensions of an Improving Partnership', CNA, 2025: https://www.cna.org/analyses/2025/01/the-evolving-russia-iran-relationship, accessed 10 August 2025.

[25] James Byrne, Jospeh Byrne and Gary Somerville, 'The Orient Express: North Korea's Clandestine Supply Route to Russia', RUSI, 16 October 2023: https://www.rusi.org/explore-our-research/publications/commentary/report-orient-express-north-koreas-clandestine-supply-route-russia, accessed 10 August 2025.

[26] Anna Caprile and Eric Pichon, 'Russia in Africa: An Atlas', European Parliament Research Service, February 2024: https://www.europarl.europa.eu/RegData/etudes/BRIE/2024/757654/EPRS_BRI(2024)757

buying materiel for its military industries from these states. For example, Russia used to import Titanium from Ukraine but as this is no longer possible now imports it from several countries including Mozambique.[27] Cotton for explosives production, for example, is sourced from Mali. The demand for defence materiel from the Russian military means that foreign military sales are not being widely pursued, however this will not remain the case if there is a ceasefire in Ukraine.

Russia has invested massively in its defence industries over the course of the war. This has not only seen defence spending rise to 7% of GDP but the Russian state has also required enterprises over which it has control to invest their own capital in increasing production capacity and has established a mechanism of long-term lending to companies to enable them to further expand. Much of this production capacity is non-dual use.[28] A new plant, built in 2025, for example, will produce approximately 6,000 tonnes of high explosive a year.[29] Once hostilities cease in Ukraine, Russia will need to continue a high rate of military production, first to rearm its own forces but then to simply recover the loans to defence enterprises and avoid an economic shock. Indeed, several factories in Russia that previously produced consumer goods have converted to military production because of the favourable financing and assured government contracts, but without this they would have gone bankrupt. Thus, Russia will be eager for markets to export arms after the conclusion of fighting in Ukraine, and its expanding web of military cooperation agreements will provide these markets. Russia will be helped in this endeavour by the damage it has inflicted and further destruction it aims to deliver to Ukraine's defence industries which before the full-scale invasion were major competitors with the Russians in offering Soviet legacy equipment and servicing.

The attraction of Russian weapons systems is not only related to their price but also availability. For example, with a rapidly increasing use of UAVs around the world, there is a growing demand for short range air defence systems and electronic warfare. Russia has extensive battlefield experience countering UAVs and builds highly effective air defence and electronic warfare complexes. Although the West also produces highly effective systems in this area, it may be reluctant to see such technologies proliferate. The proliferation of advanced SAMS in particular poses a major obstacle to the efficiency of Western operations, as demonstrated by U.S. attempts to conduct strikes over Yemen in early 2025. This is a risk that will emerge once the war in Ukraine concludes. The West will face a dilemma between offering competitively costed solutions to these problems to states that are not necessarily trusted with advanced air defences, or see Russian defence industry fill up its order books and, once these relationships are established, work to translate sales into sustained access and sustained access and security assistance through training into influence. The West's past record as regards acting to see off known future risks is not impressive.

Ceding the Field

Russia’s plans to displace the West in Mali, Burkina Faso and Niger were known about well in advance. Indeed, the specific concessions that the Russians wished to take over were also identified. Nevertheless, the Russians succeeded. Reflecting on these expulsions, the Commanding General of

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654_EN.pdf, accessed 10 August 2025.

[27] Trade data on Russian imports seen by the author.

[28] Jack Watling and Oleksandr V Danylyuk, ‘Winning the Industrial War: Comparing Russia, Europe and Ukraine, 2022–24’, RUSI, 3 April 2025: https://www.rusi.org/explore-our-research/publications/occasional-papers/winning-industrial-war-comparing-russia-europe-and-ukraine-2022-24, accessed 10 August 2025.

[29] Maria Svetkova, Polina Nikolskaya, Anton Zverev and Ryan McNeill, ‘Russia building major new explosives facility as Ukraine war drags on’, Reuters, 8 May 2025: https://www.reuters.com/investigations/russia-building-major-new-explosives-facility-ukraine-war-drags-2025-05-08/, accessed 10 August 2025.

Africa Command, General Michael Langley, argued in June 2024 that the states in question would soon realise that what the U.S. had to offer was better and that the enthusiasm for Russia would burn itself out.[30] The prescription was thus continuity. A very similar view has pervaded discourse in Paris, where French commanders, despite being surprised as they have been expelled from country after country, have also essentially responded by suggesting that buyers remorse will see their partners invite them back in time.[31]

Prescribing more of the same, when the trajectory of the security environment deteriorated despite U.S. security assistance for over a decade is not a convincing argument. The reaction suggests that the U.S. and other states have failed to identify where they went wrong. Ultimately, these conflicts were never priority theatres. As a result little resource was available. In a resource scarce environment the U.S. prioritised counterterrorism, just as European states prioritised migration. Threats in terms of global terrorism were arguably degraded. But little progress was made in improving the security of the local population. Indeed, without the resources to enable partners to operate, much more effort was put into preventing them from pursuing various courses of action that would be politically uncomfortable for western capitals. The experience therefore of these partners was that the U.S. and European states had disinvested from solving problems while being heavily invested in process. While the Russians sold this as duplicity, it is more reflective of a lack of policy attention and therefore narrowly defined permissions for forces in country.

Russia's successes are heavily bound up in the fact that elites in many of the states where the U.S. provides security assistance do not believe that the United States is interested in the outcomes of their conflicts and do not trust that the U.S. will remain a reliable security partner. This is in part because permissions for operations in the U.S. are highly centralised so that when troops are not on a main effort they also lack the authorities to align with partner aims. When they are on the main effort meanwhile it is usually because the U.S. Government has core interests at stake that will override considerations of partners aims. Resolving this requires two changes. In the first place it requires the U.S. to place far more emphasis on outcomes and to be much more attuned to what local partners say they want. Second, because for those areas off the main effort, resources will be scarce, the U.S. needs to empower its personnel in country to use the resources under their command flexibly. The incident in Niger on 4 October 2017 when U.S. Special Forces were killed during a battle shows how the U.S. reacted in an extremely counterproductive manner. In the wake of the incident controls over what U.S. Special Forces did on deployment were tightened dramatically.[32] The result was a U.S. military presence which thereafter diverged from what the Nigeriens wanted. Instead, empowering local commanders to accompany, build influence, and work with partners is critical, even if it means exposing U.S. personnel to greater risk.

Another weakness of the U.S. approach to security assistance is the lack of a bespoke solution to partner forces. Within the U.S. military, U.S. Army Special Forces offer the cultural understanding and expertise to judge the effectiveness of a partner against their challenges and within their cultural context. They could be effective trainers in delivering bespoke assistance. Generally, however, they are not scaled to deliver this support to conventional forces and so focus on specialist partners.

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[30] Presentation watched by the author, Germany, June 2024.

[31] Though some are raising the alarm, see Alain Antil and Thierry Vircoulon, 'After the Failure in the Sahel, Rethinking French Policy in Africa', IFRI, 10 April 2024: https://www.ifri.org/en/memos/after-failure-sahel-rethinking-french-policy-africa, accessed 10 August 2025; Yvan Guichaoua, 'The Bitter Harvest of French Interventionism in the Sahel', International Affairs, vol. 96, no. 4 (2020), p. 910.

[32] Alice Hunt Friend, 'DoD's Report on the Investigation into the 2017 Ambush in Niger', CSIS, 15 May 2018: https://www.csis.org/analysis/dods-report-investigation-2017-ambush-niger, accessed 10 August 2025.

Training of conventional forces is often left to Security Force Assistance Brigades. These units, however, have a strong tendency to assess partner capability against U.S. Army standards even if these standards are not relevant to the threat or budgetary and cultural context of the partner force.[33] They tend to teach U.S. military planning processes that are overly complex for the level of education or institutional capacity of the partner, and their teaching rarely delivers a sustained improvement of partner capability. This, combined with the short tours and rapid rotation of U.S. personnel often creates a very disparaging view of partner capabilities among U.S. forces. The irony is that U.S. relations with partner forces, after an initial period of enthusiasm, often sour over time. It is worth noting that the coup leaders in Mali, Burkina Faso, and Niger who ultimately expelled U.S. forces had been extensive recipients of U.S. training.[34] There is thus a need for a much more bespoke approach to building and measuring partner capacity. This is not necessarily an area of Russian strength. Indeed, the Russians are often highly contemptuous of the partner force. But these personnel also do not pretend to offer more. Russia is also often displacing the status quo whereas the U.S. must work out how to defend and build upon long term relationships.

From a competitive standpoint it should also be noted that the U.S. has often made the operating environment quite permissive for Russian outreach. This has often been a result of a desire to avoid bilateral escalation between the powers. Given the aggressiveness with which Russia is trying to undermine U.S. interests and the conventional violence it has inflicted on Ukraine and unconventional violence it has unleashed across Europe, there are grounds to be much more direct in denying or imposing costs on Russian entry into contested theatres. Here, the lack of Russian political concern for the lives of its expeditionary corps, who are in any case fighting under contract and are often deniable, opens up widespread opportunity to disrupt and deny their ability to operate, without risking bilateral escalation.

Finally, if the U.S. wishes to build long term institutional relationships with states, the sale rather than donation of capability has an anchoring effect. U.S. gifting of equipment that cannot be sustained by the partner is less effective than sold equipment. Here, however, the cost of U.S. equipment is a massive barrier to this being viable for many states. It is often argued that U.S. prices reflect the greater quality and capability of the equipment. This is partially true. Israel, however, has demonstrated clearly that comparable levels of capability can be achieved at significantly lower cost, as has Ukraine. This is generally through ruthless simplification of platforms to focus complexity on where it is critical to the equipment's mission. This is critical to the U.S.'s own interests. The U.S. is now in an arms race with China. Its qualitative edge in that race is being quickly eroded. Quantitatively it is losing. If the cost of U.S. systems cannot be brought down, the U.S. will lose this race. At the same time, simplifying and reducing the cost of core defence material is vital if the U.S. is to make its foreign military sales and the security assistance that can be anchored by them attractive in an increasingly competitive global market.

None of the adjustments to the U.S. approach to security assistance, described above, will reverse the trend of eroding influence if the U.S. is not seen as reliable at the strategic level. The issue is not that the U.S. is becoming more transactional. Transactional relationships are valid, often stable, and can endure. In many respects the U.S. would have better relationships if it were more transactional in its approach as it would force an honest conversation about what both parties expect from

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[33] Jack Watling and Nick Reynolds, *War By Others' Means: Delivering Effective Partner Force Capacity Building* (London: Routledge, 2021), pp. 62-79.

[34] Jesse Dillon Savage and Jonathan Caverley, 'Training the Man on Horseback: The Connection Between U.S. Training and Military Coups', War on the Rocks, 9 August 2017: https://warontherocks.com/2017/08/training-the-man-on-horseback-the-connection-between-u-s-training-and-military-coups/, accessed 10 August 2025.

relationships. The issue is that very few states today have confidence that the U.S. will adhere to what it has agreed to when it matters. Even when deals are struck, they are often torn up shortly afterwards. In this environment, the U.S. becomes a highly unattractive partner, even to long term allies. It must be acknowledged that adjustments to the implementation of security assistance will only work if they have a stable political foundation. In the current context, therefore, the fundamental question is whether the U.S. wants to have strong security assistance relationships or whether it wishes to retreat from most theatres of competition.

Coda: Unresolved Business

This paper raises several questions that are worthy of further discussion and study as regards what the United States can do to effectively compete with Russia.

1. How can the U.S. establish collaboratively define shared problems to solve with partners without creating expectations that will either disappoint the partner or divert disproportionate resources to lower priority theatres?
2. How can the U.S. continue to compete effectively in states where Russia has poisoned the market for Western business and tarnished the Human Rights record of local partners?
3. How can the U.S. increase the risk of Russian Security Assistance so that operations are not cost neutral or self-sustaining and thereby stretch Russian capacity?
4. How can the U.S. empower its personnel locally without accruing political risk centrally?
5. How can the U.S. expand defence industrial relationships for serviceable equipment in lower income countries while its own industry is gearing up to support U.S. forces in a contest with the PRC where qualitative advantage is a priority?

Recommendations

Based on what this paper has argued it is recommended that the U.S.:

- review its security assistance programs to define desired partner outcomes and how the U.S. can enable those outcomes, or whether there is an incomparability in objectives and thus a high risk of divergence.
- better empower subordinates in country to plan and execute campaigns, especially in lower priority theatres where the lack of political attention is likely to otherwise restrict authorities and thereby limit the ability to deliver for the partner.
- explore how it can better tailor conventional security assistance to partner needs and in particular cultural approach to operations, rather than endeavouring to replicate U.S. military practices.
- be more aggressive in confronting Russian theatre entry, including using kinetic actions against undeclared Russian forces where they engage – for example – in attacks on civilians or other actions that create a legal basis for countering them.
- endeavour to simplify and reduce the cost of its defence materiel both for its own needs in matching Chinese defence output, and to be competitive in becoming the primary provider of equipment to a broader range of security partners. There is a need to work out how to enable partners to tackle emerging threats without proliferating high risk systems.
- Work to reassure partners of U.S. strategic reliability.

Background Research - Paper 5

Gates Forum IV

Navigating a Competitive Marketplace: U.S. Security Assistance in the Global South

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1. Introduction

Security assistance—the provision of arms, training, and technology from one state to another—is one element in a toolkit which states use to curb the influence of would-be competitors and advance their national interests. Over the last three decades, this marketplace has been dynamic. Some suppliers held steady or reduced the volume and type of assistance they provided, while others expanded their engagement and sophistication of their offers. Many traditional players provided security assistance diffusely across a broad and varied set of countries. Emerging suppliers more often concentrated on distinct market niches based on economic, religious, or political interests.

The players have become more heterogeneous, and the toolkit has also evolved. Arms transfers to upgrade a partner's military kit and capacity-building programs remain standard playbook features for advanced and emerging economies.[2] Controversially, dual-use technology exports, joint security operations, and private military and security companies (PMSCs) are on the rise, which may make local populations safer or less secure.

Security assistance relationships require not only willing suppliers but also motivated recipients. This chapter examines the competitive supply- and demand-side dynamics of security assistance in the Global South–an imperfect shorthand for an incredibly diverse set of roughly 130 low- and middle-income countries with varying political clout, economic prospects, and relationships with the United States (U.S.).[3] As a group, "Global South countries have growing political and economic importance and a history of banding together to pressure advanced economies to change international rules, norms, and institutions that they view as unfair to their interest."[4]

This article assesses how U.S. security assistance compares with the available alternatives in the Global South. It is organized around four questions. Who are the leading suppliers of security assistance? In which markets are these suppliers most competitive—and why? How might the U.S. employ offensive and defensive measures to ensure competitors' efforts do not undercut its influence and interests? This global analysis emphasizes geographies less covered by other papers in this volume: Europe, North Africa, the Middle East, and the Asia-Pacific.

An exhaustive assessment of all security assistance providers active in the Global South is beyond the scope of this piece. Instead, this article primarily compares how China, Russia, and the United States supply security assistance to low- and middle-income countries. Other major suppliers, such as France, Israel, Türkiye, and the United Arab Emirates, are included to a limited degree as relevant to the discussion of competitive dynamics in Global South markets. These actors have an important commonality: they were each represented among the top-20 suppliers of arms globally in the last decade.[5] Yet, they are still helpfully diverse in regime type, economic status, geostrategic posture, and cultural context.

The discussion places relatively greater weight on arms transfers (e.g., orders serviced, weapons delivered, capability transferred),[6] for which there is more comprehensive data available from the Stockholm International Peace Research Institute's (SIPRI) Arms Industry Database, which collects comparable data on supplier activities annually. However, security assistance is about more than arms alone, and a singular focus on these transfers could underestimate the offer of non-traditional players. To the extent possible, this paper integrates qualitative and quantitative insights about less easily observable tools such as technology, training, and joint operations. Nevertheless, this discussion is more bounded due to a deficiency of comparable information.

The remainder of this paper provides an overview of major security assistance suppliers and their respective positioning in the Global South (Sections 2-4), discusses the competitive dynamics of security assistance markets (Section 5), and concludes with implications, recommendations, and questions for U.S. policy (Section 6). Global trends are interwoven with insights from nine demand-side cases to spotlight security assistance in specific contexts: Algeria, India, Iraq, Morocco, Myanmar, Pakistan, Serbia, Ukraine, and Vietnam. Cases were selected to vary by income level, regime type, geographic region, and dominant supplier.

2. United States

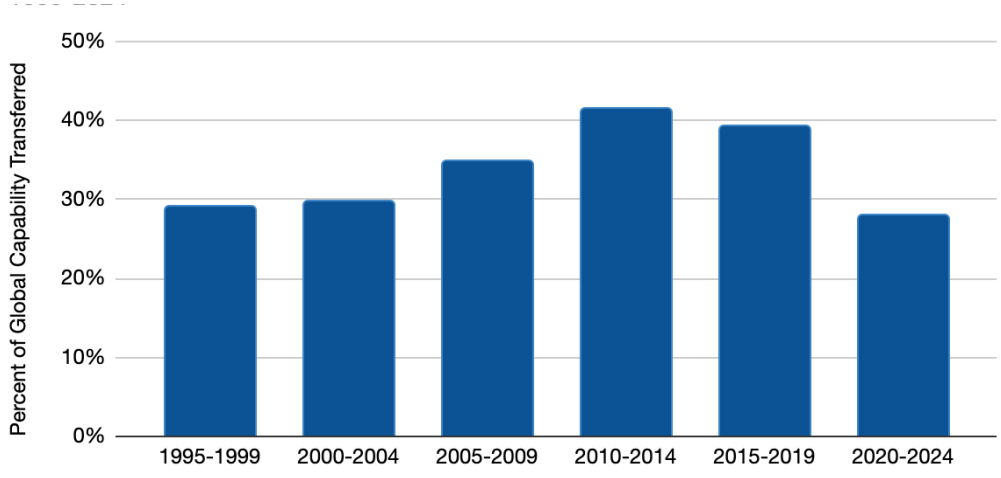
As Sheena Chesnut Greitens describes in her chapter for this research volume, U.S. security assistance has emphasized equipping foreign militaries with the requisite arms and training to help America deter and combat threats to regional security. Renanah Joyce argues in her contribution that the degree to which America has prioritized this instrument of power has evolved in response to how U.S. policymakers understand prevailing risks.

The U.S. was the largest arms supplier globally over three decades (1995-2024).[7] It led the field by a wide margin in orders serviced (29 percent), weapons delivered (52.6 percent), and arms capability transferred (34.6 percent). U.S. transfers were diffuse. High-income countries in the Americas, Europe, and the Middle East were a revealed priority. The U.S. share of capability transfers peaked in 2010-2014 before tapering off in the last decade (Figure 1).

OECD countries[8] and those that host U.S. military bases[9] attracted more capability transfers. Saudi Arabia was the biggest recipient overall, but Ukraine attracted an outsized share of U.S. arms more recently.[10] Only six of the 28 countries that received greater than 1 percent of U.S. arms transfers were low- and middle-income countries. This subgroup included "war on terror" allies (e.g., Egypt, Iraq, Pakistan, Afghanistan, Morocco), historical recipients of U.S. economic development assistance,[11] and India, which, as a QUAD member, cooperates on maritime issues, cybersecurity, and counter-terrorism.[12] Figure 2 visualizes arms transfers to each Global South country (size of the bubble) and the share of that local market held by the U.S. (color gradient).

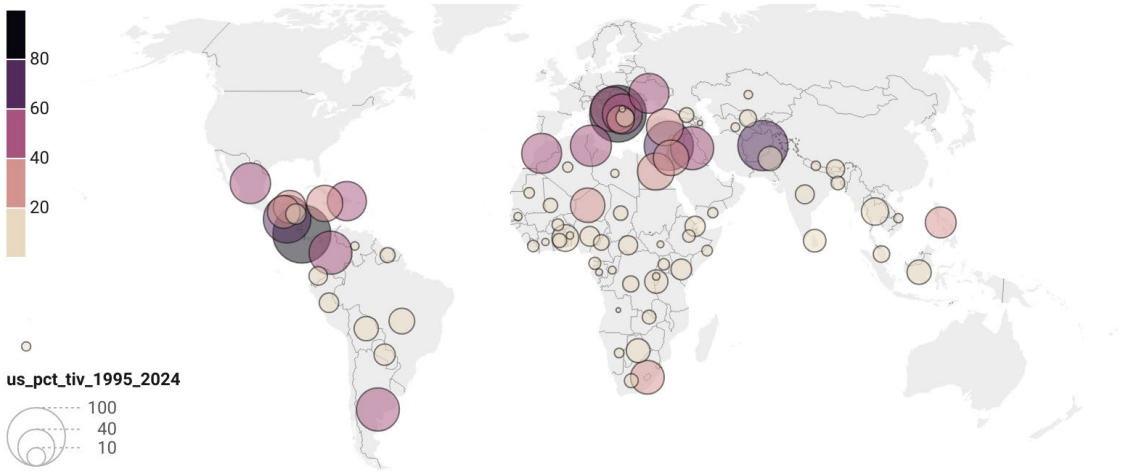
The U.S. achieved a dominant share (greater than 45 percent) of the arms market in 15 low- and middle-income countries.[13] Countering sources of instability from terrorism and drug-trafficking was a common concern, from religious extremism in the Middle East and Africa to transnational crime in Latin America. Projecting strength vis-à-vis Russia was a shared interest with Europe. Box 1 looks at three illustrative cases where the U.S. was the dominant supplier.

Figure 1. U.S. Share of Global Arms Capability Transferred, All Countries, 1995-2024



Source: SIPRI Arms Industry Database. Notes: Trend-indicator-value (TIV) of U.S. arms capability transferred to other countries, all income levels, as a share of global supply, 1995-2024.

Figure 2. U.S. Share of Arms Capability Transferred, Global South Only, 1995-2024



Source: SIPRI Arms Industry Database. Notes: Trend-indicator-value (TIV) of U.S. arms capability as a share of that transferred by all suppliers to a given low- or middle-income country, 1995-2024.

Box 1. U.S. Arms and Tech Transfers in Context

Morocco: The largest destination for U.S. arms in Africa, Rabat sources American equipment from tanks, armored personnel carriers, and radar to aircraft, rocket launchers, and missiles. A "major non-NATO ally," Morocco can purchase previously owned defense articles at discounted cost through the Excess Defense Articles program and new weapons via the U.S. Foreign Military Financing and Direct Commercial Sales programs.[14]

Iraq: Provision of military kit is one aspect of America's support to the Iraqi armed forces, including munitions and logistics equipment, small arms, protective gear, drones and radar, mine-resistant and armored vehicles, and aircraft.[15] Iraq purchased some of this equipment through programs that provide access to American weapons at reduced cost (e.g., Excess Defense Articles) or with flexible financing terms (e.g., subsidized credit agreements).[16]

Ukraine: The volume and sophistication of U.S.-supplied arms to Ukraine ramped up substantially after Russia's 2022 invasion.[17] Washington deployed more resources to aid Ukraine in 2022 than it had given to any other country in a single year since the Cold War.[18] Examples include tanks, armored and mine-resistant vehicles, patrol boats, aircraft, air and coastal defense systems, missiles, unmanned aerial systems, and surveillance and armed drones.[19] Some weapons were available at reduced cost (e.g., Excess Defense Articles, Presidential Drawdown Authority) or with flexible credit lines (e.g., Foreign Military Financing). U.S.-approved third-party transfers allowed NATO allies to reallocate U.S.-origin weapons from their stockpiles for Ukraine's use.[20]

U.S. programs to train foreign military and security services range from formal educational opportunities under the International Military Education and Training program to shorter, professional courses to build capacity and relationships with counterparts. Counterterrorism, counternarcotics, and counterinsurgency were traditional emphases of U.S. training programs. As Jim Marckwardt argues in his chapter, the capacity-building mission of U.S. assistance evolved from narrow tactical domain knowledge to helping develop institutions for partner nations to "manage their defense sectors effectively, transparently, and under civilian control."

While there have been successes, such as PLAN Colombia, the focus of Marckwardt's chapter, there have also been nadirs in the history of U.S. capacity-building efforts, the most scrutinized of which is Iraq, where American forces attempted to rebuild the army after the 2003 U.S.-led invasion, stabilize the country, and pave the way for coalition troops to exit.[21] Realizing this vision has been expensive, and success elusive.[22] Despite larger numbers, superior equipment, and advanced training, the Iraqi Army was outmaneuvered by Islamic State fighters in 2014.[23]

The lessons from this episode apply to the future of U.S. security assistance in Iraq and beyond. Rather than overly relying on arms transfers and military advisers, some proposals suggest a greater U.S. focus on getting the incentives right for partner government and security services to counter threats on their own, such as through enhancing the capacity of civilian law enforcement, joint operations command centers, and conditioning future assistance on advancing needed security sector reforms.[24]

The U.S. employs joint exercises to project strength, build capacity, and prepare for future conflicts in coordination with partner nations. Over three decades, there has been a marked uptick in the number of exercises organized and a growing diversity in the participating nations and scenarios.[25] Comparable data across suppliers over time is in short supply. Still, the U.S. led the field in the number of countries (80 percent) with which it held joint exercises between 1990 and 2016, compared to 60 percent for NATO, per one estimate.

There is a clear shift in how policymakers have deployed this tool of security assistance over the years. The share of "non-allied countries" participating in U.S. joint exercises catapulted from roughly 25 to 70 percent between 1990 and 2016.[26] Similarly, the U.S. has not made democratic governance a litmus test for joint military exercises, as 40 percent of participating countries by 2016 were autocracies, up from approximately 25 percent in 1990.[27]

Why might this be? Joint exercises strengthen operational capacity, tactical interoperability, and strategic coordination between partner nations' militaries. They also serve a secondary purpose of "political signaling" and power projection to deter potential rivals and those who support them.[28] Past research has found that participants in joint exercises are less likely to engage in conflict with each other and more likely to align forces in a dispute with an external actor.[29]

U.S. government personnel, including members of the armed services and civilian agencies, are often the face of American security assistance, but not always. Many private military and security companies come from Western democracies like the United States.[30] American PMSCs account for a commanding share of an industry worth roughly US$224 billion.[31] As Renanah Joyce discusses in her chapter, U.S. PMSCs not only engage in arms manufacturing and sales, but also training and joint operations abroad with counterpart armies.[32]

Private contractors comprised one-quarter of U.S. personnel in conflict zones like Iraq and Afghanistan by 2016.[33] However, American PMSCs are non-exclusive in their dealings. An estimated 80 to 90 percent of contracts were with parties outside of the U.S. government and NATO allies.[34] Some American PMSCs, along with those from other countries, have been scrutinized for the legality of their actions, the practice of hiring paid mercenaries, and alleged violations of human rights and international norms.[35]

Box 2 looks at how the U.S. deploys training and operational support in Morocco, Iraq, and Ukraine in three illustrative cases.

Box 2. U.S. Training and Operational Support in Context

Morocco: U.S.-Moroccan joint exercises improve synchronization to engage in non-traditional threats such as electromagnetic warfare (Arcane Thunder 2024) and violent extremism (Flintlock).[36] Moroccan students train at U.S. armed service schools,[37] and the Utah National Guard supports joint security and humanitarian operations, exchange programs, and an airshow exhibition.[38] The U.S. bolsters civilian law enforcement and public safety through landmine disposal programs to safely dispose of unexploded ordnance from the Western Sahara conflict.[39] Modernizing Morocco's armed forces, countering weapons of mass destruction, and addressing regional instability were key facets of a ten-year Military Cooperation Agreement signed in 2020.[40]

Iraq: The U.S. has trained the Iraqi security services in counterterrorism, intelligence gathering, safe landmine disposal, surveillance and reconnaissance, recognition and interdiction, and counterproliferation.[41] Roughly 350 members of the Iraqi Security Forces have attended U.S. military schools since 2015.[42] About 2,500 U.S. military personnel work with Iraqi and Kurdish counterparts on drone strikes and intelligence gathering efforts.[43] The Iraqi Counterterrorism Service has collaborated with U.S. Special Operations Forces for over 20 years,[44] through the Counter-ISIS Train and Equip Fund and Iraqi Security Forces Fund, to deliver equipment and training.[45]

Ukraine: The U.S. has provided platform-specific training for Ukrainian counterparts to operate American-made weapons systems, conduct demining activities,[46] and monitor export control compliancee.[47] The two militaries regularly engage in bilateral and multilateral exercises such as Rapid Trident (an annual computer-assisted exercise)[48] and Sea Breeze (an annual amphibious warfare exercise).[49] The California National Guard has advised the Ukrainian defense forces for 29 years.[50] Since 2022, a command center in Germany has coordinated joint U.S. and Ukraine efforts to counter Russian aggression, from supply chain management for weapons systems to operational planning.[51] The Security Assistance Group-Ukraine and the Combined Joint Special Operations Task Force have supplied signals, imagery, and human intelligence[52] to inform Ukraine's targeting strikes and tracking of active threats.[53] A Remote Advise and Assist Cell provides "remote support and real-time data sharing".[54]

3. Russia

Russia positions itself as a purveyor of modern weaponry and dual-use technologies at low cost, with minimal conditions.[55] The Kremlin recognizes that building partner capacity via technology transfers, localized arms production, and joint exercises enhances its appeal. Moscow deploys Russian PMSCs at scale to exert influence with countries experiencing insecurity at home and fraying relations with the U.S. or colonial powers like France.[56] Nevertheless, the Ukraine war

has disrupted supply chains, distracted the Kremlin's attention, and exposed Russia's customers to U.S. third-party sanctions.[57] Moscow's loss may be Beijing's gain, as China has become a substitute for some countries wary of the high transaction costs of relying on Russia for security.

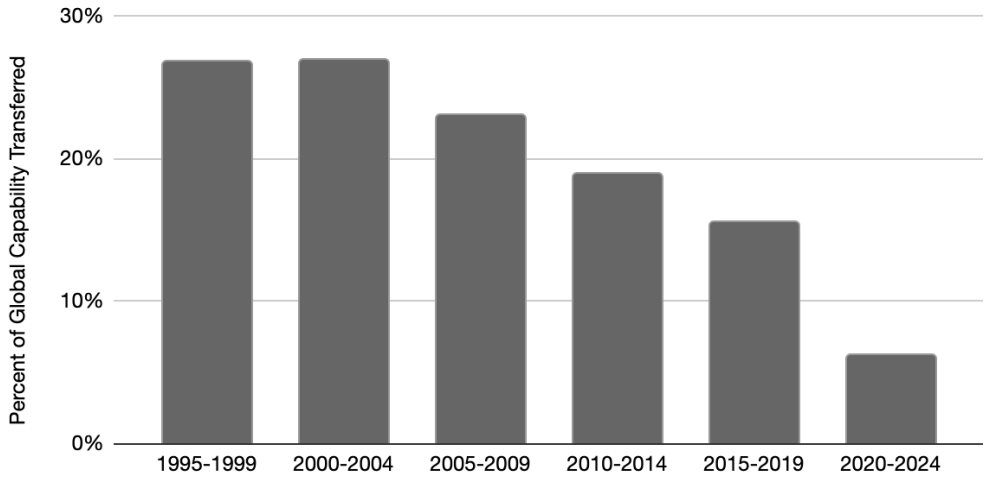
Russia was the second biggest supplier of arms globally, accounting for 10.5 percent of orders serviced, 16 percent of weapons delivered, and 21.4 percent of arms capability transferred between 1995 and 2024. Holding a majority stake in most defense-related firms, the Kremlin has a "direct material interest in the financial revenues,"[58] but its arms transfers have declined by double digits across all three measures over the three-decade period (Figure 3).[59]

Compared to the U.S., Russia concentrates its assistance, with India and China each receiving roughly a quarter of the Kremlin's capability transfers. Twelve additional countries account for between 1 and 10 percent each.[60] These recipients share several commonalities. All are low- or middle-income countries. Five host Russian military bases or have installations protected by Russian forces.[61] Seven are targets of U.S. or UN Security Council arms embargos or sanctions.[62]

Russian companies are market leaders in selling systems to monitor telecommunications, along with facial and speech recognition, to security services worldwide.[63] These products give intelligence agencies a backdoor into their countries' Internet, with real-time surveillance.[64] The Kremlin is developing AI-enabled solutions for predictive policing analytics,[65] and Global South countries clone its laws to facilitate information control, citizen surveillance, and repression.[66]

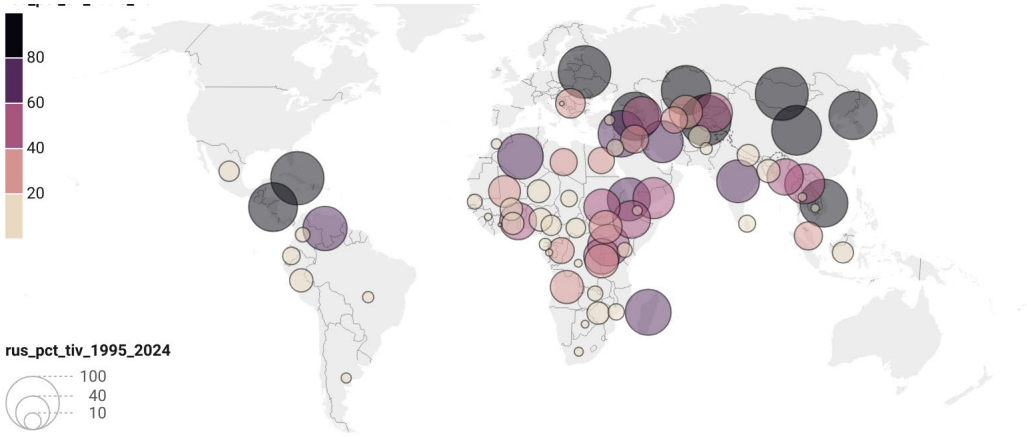
Russia has achieved a dominant share (over 45 percent) of the arms market in 25 Global South countries,[67] including targets of arms embargoes and members of Russia-led affinity blocs like the European Eurasian Union and the Shanghai Cooperation Organization. Russian dominant markets span Asia-Pacific, Africa, Latin America, Europe, and the Middle East. Box 3 provides a closer look at arms transfers in the context of three cases–India, Algeria, and Vietnam–where Russia was the dominant supplier over the three-decade period.

Figure 3. Russia Share of Global Arms Capability Transferred, All Countries, 1995-2024



Source: SIPRI Arms Industry Database. Notes: Trend-indicator-value (TIV) of Russian arms capability transferred to other countries, all income levels, as a share of global supply, 1995-2024.

Figure 4. Russian Share of Arms Capability Transferred, Global South Only, 1995-2024



Source: SIPRI Arms Industry Database. Notes: Trend-indicator-value (TIV) of Russian arms capability as a share of that transferred by all suppliers to a given to a low- or middle-income country, 1995-2024

Box 3. Russian Arms and Tech Transfers in Context

India: Fifty-nine percent of India's defense equipment originates from Russia, with the Kremlin supplying army tanks and rocket-launch systems, navy attack submarines and guided missile destroyers, and air force aerial tankers, helicopters, and aircraft, among other weaponry.[68] Even as Indian leaders seek to increase domestic arms production, [69] they can justify continued purchases because of Moscow's willingness to pursue joint ventures with Indian firms to localize weapon production for domestic use and resale to third countries.[70]

Algeria: Supplying over 70 percent of Algeria's weapons since the 1990s, some of Russia's first big deals were inked in the early 2000s for battle tanks, fighter jets, and surface-to-air missile systems. Moscow allowed Algeria to be among the first foreign buyers of its fifth-generation stealth fighters and S-400 surface-to-air missile systems.[71] Russia has thus far avoided granting manufacturing licenses, sharing underlying technologies, or pursuing joint ventures to localize production.[72] However, the Kremlin is revisiting this posture, pledging in 2023 to expand technology transfer and joint production.[73]

Vietnam: Russia holds a commanding share of roughly 80 percent of Hanoi's arms imports over the last three decades. The Kremlin supplies a variety of weaponry, including submarines, frigates, patrol boats, corvettes, aircraft, tanks, coastal defense systems, and anti-aircraft missiles.[74] It has been Vietnam's primary arms supplier since the 1950s, which presents Hanoi with formidable interoperability challenges to integrate legacy Russian systems with alternative suppliers.[75] Russia has signed licensing deals with Vietnamese firms to produce Russian arms using the original design or modified versions to better fit the local market.[76] In exchange for access to Cam Ranh base to support its operations, Russia agreed to help repair and develop the facilities and dockyards.[77]

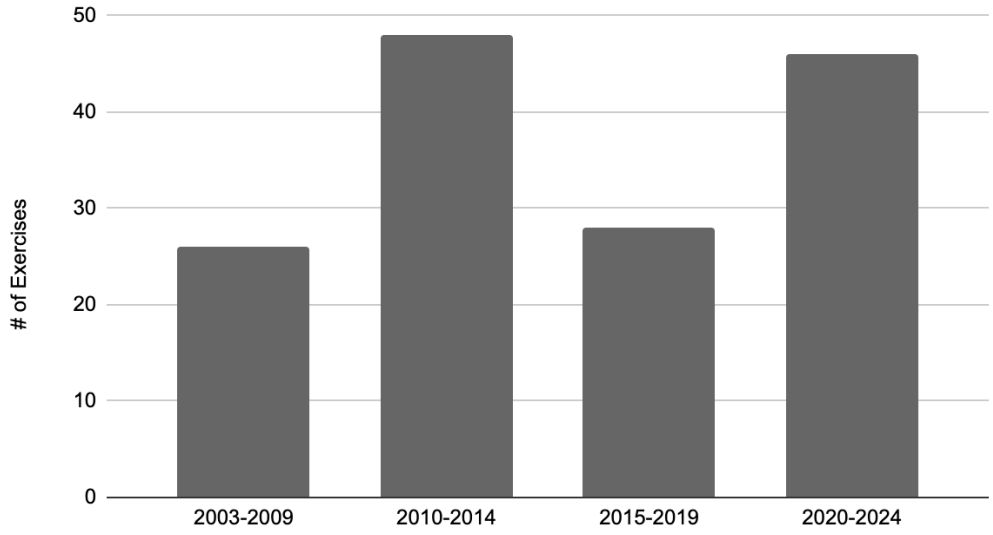
Russia has been a prolific organizer of competitions, exercises, and other training. The Kremlin's International Army Games spotlight Russian military hardware and build relationships among counterpart militaries from roughly 30 countries. The Russian army holds a regular joint exercise series named for different Russian military districts: "Zapad," "Vostok," "Tsentr," and "Kavkaz."[78] Other armed services, like the Navy and Air Force, hold bilateral and multilateral joint exercises.

The Kremlin has held approximately 148 joint military exercises with 68 counterpart nations between 2003 and 2024 (Figure 5).[79] Five countries were the most frequent participants in joint military exercises with Russia over two decades (2003-2024). Repeat customers include near-peer competitors like China, which participated in 111 joint exercises alongside Russia, along with post-Soviet countries such as Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan located within the Kremlin's traditional geographic zone of influence (Figure 6).

Russia hosts personnel from foreign militaries and civilian security services for vocational training and offers more formal scholarship opportunities to attend its academies. The Kremlin not only trains active duty personnel but also the next generation of foreign military leaders. Past research uncovered Russian support for youth-focused military academies and summer camps in ethnic Russian enclaves, such as Transnistria and Gagauzia (Moldova), Gudauta (Georgia), and Crimea (Ukraine), featuring hand-to-hand combat and reconnaissance training.[80]

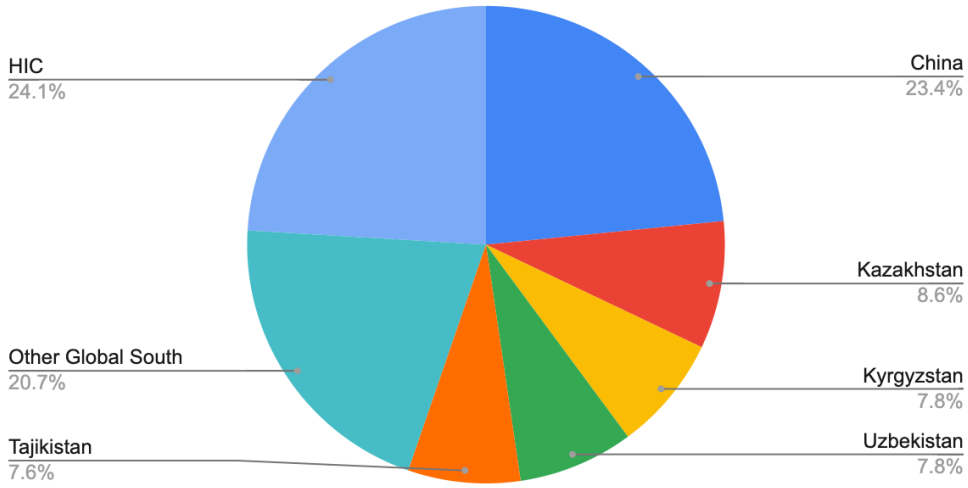
The Kremlin is a prolific exporter of doctrine, processes, and systems to facilitate information sharing and joint operations on counterterrorism, counternarcotics, and organized crime.[81] This has included support to incumbent political regimes (e.g., helping Armenian police develop a criminal database and conduct joint drills to improve border control)[82] and law enforcement in restive regions and autonomous territories (e.g., training for Republika Srpska's Ministry of Interior, a joint information operations center with Abkhazia's Internal Affairs Ministry).[83]

Figure 5. # of Joint Military Exercises Organized or Attended by Russia, 2003-2024



Sources: CSIS. China Power Dataset on China-Russia Joint Military Exercises for 2003 to 2024. Joint Military Exercises Involving Russia dataset for 2009 to 2018 from Formin, I., Shavlay, E., Stolyarova, S., and N. Silaev. "Joint Military Exercises Involving Russia.tab", *Joint Military Exercises Involving Russia*, https://doi.org/10.7910/DVN/UZHJMW/E7MKPU.

Figure 6. Frequency of Participation in Joint Military Exercises with Russia, 2003-2024



Sources: CSIS. China Power Dataset on China-Russia Joint Military Exercises for 2003 to 2024. Joint Military Exercises Involving Russia dataset for 2009 to 2018 from Formin, I., Shavlay, E., Stolyarova, S., and N. Silaev. "Joint Military Exercises Involving Russia.tab", *Joint Military Exercises Involving Russia*, https://doi.org/10.7910/DVN/UZHJMW/E7MKPU.

Russian PMSCs gained notoriety given the Kremlin's appetite to deploy them at scale in combat operations.[84] At times, Russian PMSCs allow the Kremlin to insulate a friendly regime (e.g., protection services, site security, training, and advisory services) from domestic or international pressure.[85] Moscow also weaponizes Russian PMSCs to provide plausible deniability in working with local proxy militias or opposition groups to disrupt regimes hostile to its interests.[86]

With activities spanning "30 countries across four continents,"[87] Russian PMSCs are more involved in kinetic operations than Chinese or Western counterparts, with a growing presence in Africa and Latin America.[88] Russian PMSCs are viewed as more likely to cause harm to local communities and skew governance practices, without democratic checks and balances at home.[89] They historically have close ties to the Kremlin but do not always operate at the behest of the state.[90] The Wagner Group is a case in point: the Kremlin dismantled and reconstituted its capabilities under the Africa Corps to give Moscow greater control over its operations, after a 2023 "mutiny" against Vladimir Putin's authority.[91]

Box 4. Russian Training and Operational Support in Context

India: Russia has invested in India's defense industrial base since the Cold War—building factories, training workers, and transferring technology.[92] The India-Russia Intergovernmental Commission on Military and Military-Technical Cooperation emphasizes joint research and training.[93] India and Russia participated in 16 joint military exercises between 2012 and 2020 across the service branches.[94] A Reciprocal Exchange of Logistics Agreement expands joint exercises across land, air, and sea to enhance interoperability between Indian and Russian armed forces for military and humanitarian operations.[95]

Algeria: The two countries have made strengthening cooperation in military training and research a priority.[96] Algerian intelligence and military officers participate in Russian exchange programs or training courses, and there have been reports of Russian military advisors training elite Algerian military units.[97] Algerian and Russian forces participate in joint exercises for knowledge exchange and interoperability in counter-terrorism operations (e.g., 2021 in North Ossetia, 2022 in Southwest Algeria) and naval maneuvers (e.g., 2021 in the Mediterranean, 2022 in Vostok).[98]

Vietnam: Vietnam has regularly participated in Russia's annual International Army Games (or "War Olympics") since 2018, serving as a co-host in 2021.[99] The Kremlin conducts joint exercises with the Vietnamese military bilaterally (e.g., the Continental Union 2022 exercise focused on improving capabilities for managing complex tactical situations)[100] and with ASEAN peers (e.g., the 2021 Russia-ASEAN Naval Exercise for maritime security cooperation and force interoperability).[101]

4. China

Beijing has transformed itself from one of the largest arms recipients to a major supplier. While the Chinese government doubled down on domestic arms production[102] to reduce dependence on foreign suppliers, an import byproduct was the sale of "export variants" overseas.[103] Foreign militaries are important customers for weapons and participants in capacity-building efforts. Still, Beijing's network-building with counterpart civilian agencies charged with internal security, law enforcement, and intelligence is the jewel in the crown of Chinese security assistance.

As Chesnut Greitens elaborates in her chapter, China's civilian-centric approach is an extension of how Beijing conceptualizes its security: to preserve the Chinese Communist Party's (CCP)

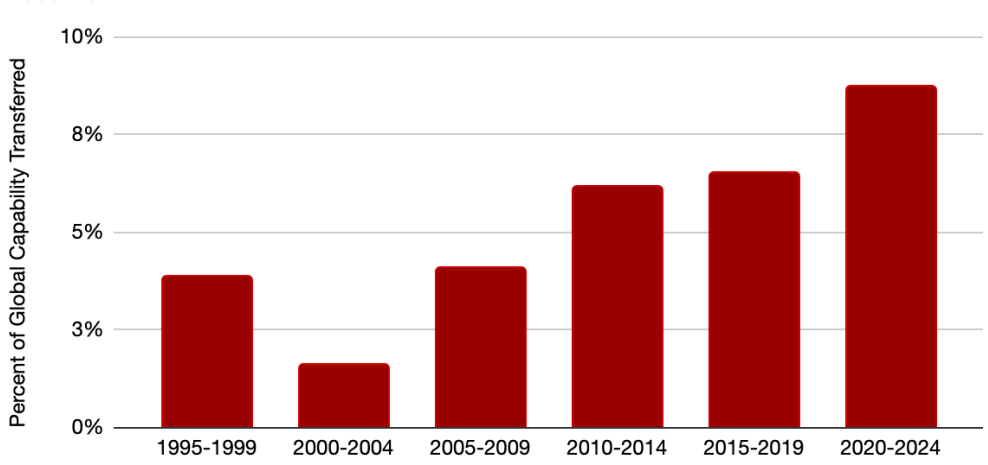
unrivaled hold on power by proactively managing instability and countering challenges to its authority, at home and abroad. Local law enforcement, paramilitary, and intelligence agencies are central to Chinese President Xi Jinping's Global Security Initiative (GSI),[104] with China's Ministry of Public Security (MPS) and the CCP's Political-Legal Commission (CPLC) as two of its most prolific implementers and cheerleaders.[105]

China was the fourth biggest supplier of arms globally, accounting for 5.6 percent of orders serviced, 2.15 percent of weapons delivered, and 4.7 percent of arms capability transferred between 1995 and 2024. If Russia's story has been one of relative decline in stature as a go-to arms supplier, China has been on the opposite trajectory. In the last five years, Beijing has displaced Russia to become the second largest arms supplier, accounting for 9 percent of global arms capability transfers (Figure 7).[106] Chinese firms began at the low end of the value chain, supplying small arms and light weapons, before graduating to major arms with advanced technologies, from aircraft and submarines to drones and missile systems.[107]

All but one of Beijing's top arms recipients were low- and middle-income countries. China transfers an outsized share of its arms capability to Pakistan (44 percent) and Bangladesh (10 percent). Fifteen other countries each attracted between 1 and 10 percent of China's transfers, spanning Africa, Asia, and Europe, Latin America, and the Middle East.[108] Top recipients included targets of U.S. or UN Security Council arms embargoes or sanctions,[109] but Beijing did not prioritize countries where it has military bases.[110] Several were members of affinity blocs in which China plays a leadership role (e.g., BRICS+, the Shanghai Cooperation Organization).[111]

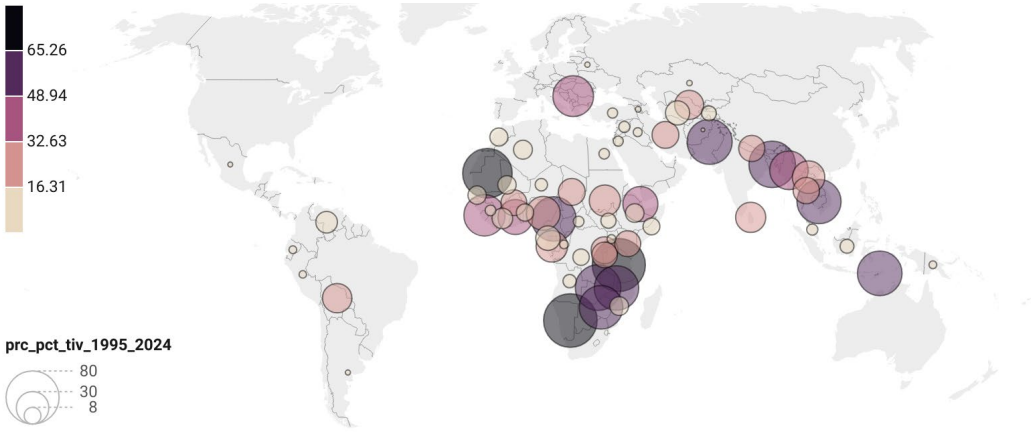
China has parlayed overlapping economic and security ties to achieve a dominant share of the arms market in 14 Global South countries.[112] Its dominant markets were concentrated in Sub-Saharan Africa and the Asia-Pacific, with Serbia emerging as Beijing's gateway into Europe. Consistent with Beijing's priority to secure its global infrastructure investments, these countries are BRI members with access to Beijing's debt-financed development. "GSI-friendly countries" are also top recipients of Chinese arms.[113]

Figure 7. China Share of Global Arms Capability Transferred, All Countries, 1995-2024



Source: SIPRI Arms Industry Database. Notes: Trend-indicator-value (TIV) of China's arms capability transferred to other countries, all income levels, as a share of global supply, 1995-2024.

Figure 8. China Share of Arms Capability Transferred, Global South Only, 1995-2024



Source: SIPRI Arms Industry Database. Notes: Trend-indicator-value (TIV) of China's arms capability as a share of that transferred by all suppliers to a given a low- or middle-income country, 1995-2024

Beijing is a go-to supplier of dual-use technologies for surveillance, reconnaissance, facial recognition, drones,[114] biometrics, and telecommunications monitoring. China's promotion of military-civil fusion lowered barriers for its firms to be first-movers in bringing products to

market that are readily adaptable for use in commercial, civilian, and military arms contexts.[115] These technologies may yield valuable benefits (e.g., safer cities, enhanced visibility, greater intelligence, reduced casualties) but can just as easily become instruments for states to monitor, control, and repress their own populations.[116] Beijing piloted similar technologies and tactics to support the intimidation and policing of Uyghur minorities in the restive Xinjiang province.[117]

Chinese officials make extensive use of global and regional security forums (e.g., Global Public Security Cooperation Forum) to cultivate demand for dual-use technology exports.[118] Analysis of Chinese artificial intelligence (AI) exports spotlights how Beijing distributes its systems for civilian policing and intelligence gathering across the Global South. Thirty-four percent of its AI exports over two decades were oriented toward “Safe City”, “Smart City”, or “e-government” projects.[119] Other security-focused AI-exports included “advanced computing and data storage, security scanners, unnamed vehicles, and remote sensing and seismic monitoring.”[120]

Box 5. Chinese Arms and Tech Transfers in Context

Pakistan: China is Pakistan's largest arms and dual-use technology supplier,[121] delivering surface-to-air and air-to-air missiles, aircraft, tanks, submarines, frigates, and unmanned aerial vehicles for surveillance and reconnaissance.[122] After the 2025 outbreak of hostilities with India, China offered to sell Pakistan advanced J-35 stealth fighters, KJ-500 AE&WC aircraft, and HQ-19 air defense systems.[123] In keeping with Pakistan's aspirations to indigenize its arms production,[124] some of China's weapons deliveries incorporate technology transfer and local production initiatives.

Myanmar: Myanmar's ruling junta employs Chinese dual-use technologies and digital tactics to quell opposition forces.[125] China's Ministry of Public Security coordinated with Myanmar's leaders to roll out biometric databases for a new digital unique identification system,[126] while Chinese companies mainstreamed facial recognition for 'Safe City' initiatives and telecom surveillance to support monitoring of calls, messages, and Internet use of dissidents.[127] Beijing sent new weapons and replacement parts for aging equipment, including aircraft, helicopters, cargo planes, tanks, and unmanned aerial vehicles.[128] Chinese-made UAVs for combat and surveillance operations offer the junta a cost-efficient means to minimize losses while expanding territory.[129]

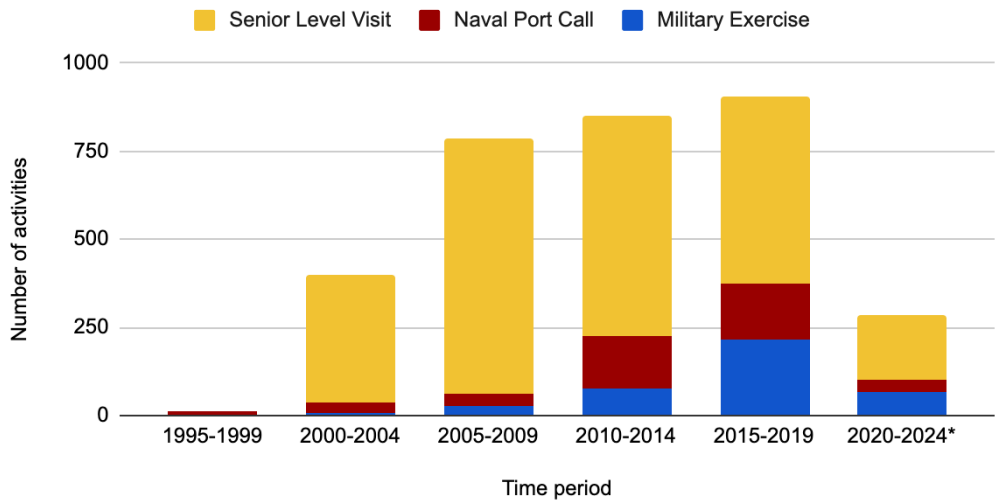
Serbia: China has outmaneuvered Russia to become Serbia's primary arms supplier, including surface-to-air and laser-guided missiles, along with surveillance and attack UAVs.[130] Transfer of Chinese technology to local firms is also credited for allowing Serbia to bring its Pegasus drone to market and rebuild surveillance capabilities.[131] Chinese companies have positioned themselves as a dominant force to help the government mainstream dual-use digital technologies with civilian and military applications.[132] Collaborating with Serbian counterparts, they have opened data centers, developed high-speed wireless internet, installed surveillance cameras with AI-enabled facial and license recognition software as part of 'smart, safe cities' initiatives.[133] Critics worry this facilitates state surveillance and creates a "technological backdoor for China to extract [sensitive] data."[134]

4.2 Chinese Training and Operational Support

Like other major powers, China deploys other instruments to deepen relationships with and build capacity among partner nation militaries. From 1995 through 2024, China engaged in 396 joint military exercises, 417 naval port calls, and 2,426 senior leader visits with 163 countries, according to the National Defense University.[135] Early on, Beijing leaned heavily on ceremonial interactions targeting elites (e.g., port calls, leader visits), with narrower reach and shorter duration (Figure 4). During Hu Jintao's second term and Xi Jinping's tenure, there was greater emphasis on joint exercises, involving a broader base of individuals and requiring more intensive coordination to execute well. The most recent five-year period coincided with the COVID-19 pandemic, which disrupted the ability of Chinese military leaders to deploy in-person

diplomacy tools. The joint exercises became more ambitious, with complex multi-domain scenarios.[136]

Figure 9. Chinese Military Diplomacy and Training, 1995-2024



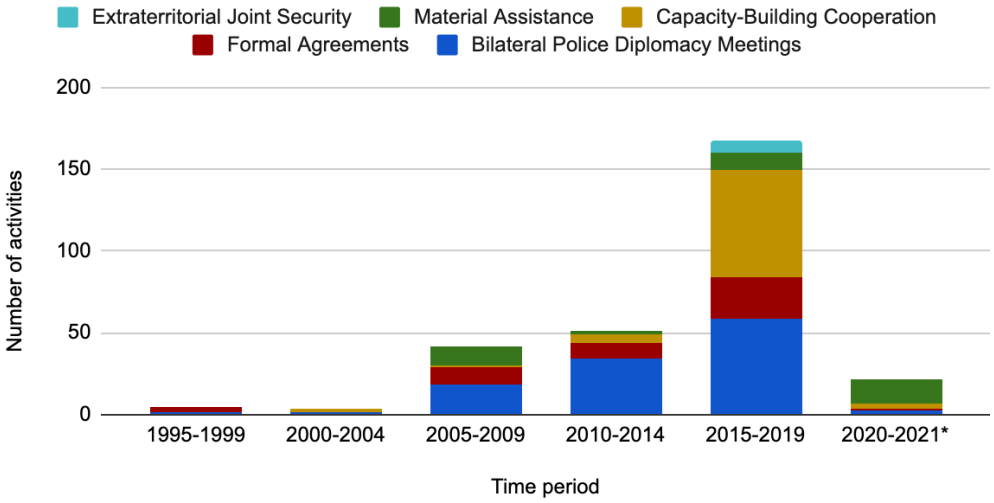
Source: Saunders, P.C. and M. Ha. (2025). China's Military Diplomacy Dataset. June 23, 2025. National Defense University Press.

Informal training and professional military education are important tools to deepen ties with partner nations. China's engagement in this realm appears to be bi-directional—both sending Chinese military personnel to study elsewhere and inviting counterparts to study in China's higher education institutions.[137] Rowland (2024) reports that 1700 Chinese military personnel studied in over 50 countries between 2012 and 2019, while 10,000 foreign military personnel from 130 countries studied in China during the same period.[138] Beijing's GSI has explicitly outlined quota targets for each geographic region for the training of both military and civilian security personnel.[139] For example, with the Forum on China-Africa Cooperation, China has explicitly set an ambitious goal of granting 6,500 military scholarships and 2,000 earmarked for police and law enforcement from 2024 to 2027 alone.

China's vision to position itself as a global leader in security cooperation extends to civilian law enforcement. Beijing's Ministry of Public Security participated in 114 bilateral meetings, signed 51 formal agreements, supported 77 training and capacity-building activities, supplied 39 donations of equipment or investigative technologies, and engaged in 7 extraterritorial joint security efforts in support of law enforcement efforts in other countries.[140] A new dataset on China's non-military security diplomacy indicates that after a brief COVID-19 lull, there has been

renewed enthusiasm for such people-to-people exchanges, with an estimated 322 total interactions between senior leaders at China's major internal security agencies and foreign counterparts via 228 events over the last three years.[141]

Figure 10. China International Policing: Ministry of Public Security Activity, 1995-2021



Source: Center for American Progress. Ministry of Public Security Database on Bilateral Foreign Engagements.

Pooling resources and best practices to prepare for and respond to threats related to terrorism, biohazards, cyberattacks, among other emergencies, are common thematic areas of such cooperation.[142] China has promoted minilateral dialogues on security at the ministerial level in the Pacific islands, and it has formed joint operations centers in ASEAN and Central Asia related to cooperation on counterterrorism, counter-narcotics, and transnational crime.[143] China has focused primarily on using private security companies for passive security services. However, it has pursued joint venture partnerships with firms in host countries, seeking to play a more active role in counterterrorism, combat, and policing operations.

Box 6. PRC Training and Operational Support in Context

Pakistan: The two countries have held numerous bilateral joint exercises by air (i.e., Shaheen joint aerial exercises),[144] and sea (i.e., the Sea Guardians series).[145] Pakistan hosted the ninth multinational maritime joint exercise series coordinated by Beijing to promote anti-piracy operations and secure sea lanes.[146] Beijing and Islamabad seek to secure investments in the China-Pakistan Economic Corridor and the deep-water port facility at Gwadar, targeted by the Baloch Liberation Army and the Tehreek-e-Taliban Pakistan militant groups.[147] They conduct multi-week counter-terrorism drills (i.e., the Warrior series),[148] and intelligence agencies work together to improve early warning systems.[149] Gilgit-Baltistan police officers conduct police and paramilitary training with counterparts from China's Xinjiang Police Academy, focused on border security and counter-terrorism,[150] and the Balochistan provincial government visited China to discuss security cooperation to curb terrorist threats.

Myanmar: Beyond military kit, Beijing has trained Myanmar's Air Force (in 2022) and assisted its naval shipyard.[151] China is forming a joint private security corporation with robust surveillance and intelligence capabilities in collaboration with Myanmar's security agencies, to facilitate a "de facto Chinese military presence on the ground without official deployment of troops" to protect BRI investments, which have been attacked by opposition forces.[152] Beijing has promoted joint ventures in other places to safeguard its investments and personnel from terrorism and instability in borrowing countries, but other governments have been resistant.[153]

Serbia: Serbian and Chinese police have conducted joint patrols since 2019 in cities across Serbia with high levels of Chinese tourists or personnel involved in Beijing's BRI investments.[154] Serbia was the first country in Europe to host a joint exercise with the Chinese security services. The exercise required Serbian and Chinese police forces to respond to a terrorist incident at a Chinese factory in Smederevo.

5. Demand Side: Security Assistance in the Global South

Nine demand-side cases in this paper each had one security assistance supplier contributing a dominant share of their arms imports over the last three decades: Russia (Algeria, India, Vietnam), China (Myanmar, Pakistan, Serbia), or the United States (Iraq, Morocco, Ukraine).[155] Nevertheless, in an era of intensified geostrategic competition, recipients hedge their bets by accepting "overlapping security assistance" from multiple players.[156] Global South countries shop to find the best combination of partners from available offers to advance their interests.

In practice, most countries purchase weapons from NATO suppliers or a China-Russia axis.[157] This may say more about path dependence than preference, given low levels of interoperability

between military systems from different suppliers. Of course, arms transfers are seldom standalone overtures and often part of a comprehensive set of engagements promoting economic and security cooperation. This section draws insights from the case study countries to pinpoint factors that appear to influence how countries approach selecting security partners.

Global South countries seek security partners to help them project strength outward to deter the territorial ambitions of troublesome neighbors. Algeria, Vietnam, and India, for example, view Moscow as a counterbalance to the expansionist ambitions of their respective regional rivals: Morocco's interests in the Western Sahara,[158] China's territorial claims in the South China Sea and South Asia,[159] and concerns over a "hostile Pakistan."[160] Beijing is Pakistani leaders' best bet to blunt India's influence and Kashmir claims.[161] Morocco relies on the U.S. to strengthen its hand in a rapidly escalating diplomatic rivalry with Algeria, with whom it cut ties in 2021.[162] Ukraine's security assistance relationship with the U.S. expanded in response to Russia's escalating campaign of aggression, from the 2014 Crimea annexation and Kremlin-backed proxies in the Donbas to information influence campaigns and full military invasion in 2022.[163]

Small and middle powers jealously guard their autonomy amid intensified competition between China, Russia, the European Union, and the United States. Global South leaders practice "strategic neutrality," embracing "non-alignment" and balancing relationships with multiple powers to hedge risks and increase their bargaining position.[164] Serbia, for instance, pursues closer ties with Beijing (one of the few major powers willing to back its position on Kosovo's independence) not only as a cost-effective way to modernize its legacy defense systems, but also to gain political "leverage" with the West.[165]

Dealing with instability at home is another critical factor for Global South leaders in selecting their security partners. Algeria and Morocco look to Russia and the U.S., respectively, to assist them in navigating spillovers of unrest from resurgent armed conflict in the Sahel, along with addressing root causes of terrorism.[166] Pakistan's big bet that it can parlay Chinese investment into making the country a "regional hub for trade, transit, and production" is in dire jeopardy from terrorist threats that threaten to destabilize hard-won economic gains.[167] Baghdad faces a daunting challenge to secure its borders, counter Iranian-backed militias, reintegrate Shiite paramilitaries, and rebuild the economy to address underlying drivers of conflict.[168]

Autocracies and democratic backsliders consider less discriminating security assistance partners to be invaluable allies in forestalling domestic pressures that would threaten their authoritarian rule.[169] Algeria pursues a strategy of "legitimacy through militarization,"[170] a "facade of civilian power," while the military governs behind the scenes.[171] Serbia seeks political cover for growing illiberalism.[172] Following a 2021 coup, Myanmar's ruling junta aims to "outlast" the resistance that opposes its rule.[173]

Economics factors into how Global South leaders weigh the attractiveness of potential partners. The defense industry is central to India's plans to bolster manufacturing to catalyze growth. Russia has obliged with joint ventures and localized production for export variants of its weapons systems. China is not only Islamabad's primary security partner, but it holds roughly a quarter of Pakistan's external debt, related to flagship projects like the China-Pakistan Economic Corridor and the Gwadar deep-water port.[174] Beijing's bankrolling of the China-Myanmar Economic Corridor has endeared it to Myanmar's isolated ruling junta, which seeks to unlock resource rents to finance the regime.[175] In 2023, a Free Trade Agreement with Beijing granted Serbia discounted access to Chinese defense-related products for over fifteen years,[176] building upon their increasing economic interdependence in light of China's sizeable BRI investments.[177]

Many Global South leaders want to diversify, rather than become reliant on one source of security assistance. Algerian leaders are reluctant to compromise their nonalignment policy and wary of Russia's growing influence in the Sahel,[178] prompting them to source some arms from China, along with Western powers.[179] Algeria and Vietnam signed cooperation agreements with the U.S. in 2025 and 2023, respectively.[180] Iraq aims to normalize diplomatic relations with its neighbors and the Islamic community worldwide,[181] as it prepares the planned exit of U.S.-led coalition forces by 2026.[182] In many contexts, players like Europe, Israel, Türkiye, and the UAE may be alternative, or at least supplemental, security assistance providers (see Box 7).

Strategic miscalculations or recalibrations create opportunities for competitors to displace an incumbent security provider. Russia's invasion of Ukraine chilled demand for its arms in four respects: concerns over Moscow's ability to deliver promised weapons systems on time, vulnerability of the Kremlin's customers to sanctions imposed by the West, difficulties paying for arms shipments in U.S. dollars, and skepticism over the effectiveness of Russian kit in light of its battlefield losses.[183] The Trump administration, meanwhile, is recalibrating the U.S.

posture in supporting Ukraine in the war with Russia, taking steps earlier this year to reduce its military assistance and pause intelligence sharing.[184] This will likely increase uncertainty among Global South leaders about America's continued reliability as a security partner.

Box 7. Other Noteworthy Security Assistance Suppliers: France, Israel, Türkiye, and the UAE

France: Once the dominant security assistance player in Francophone Africa, France's traditional role was upended recently. France accounted for 8 percent of all orders serviced, 4 percent of weapons delivered, and 7 percent of capability transfers over the last three decades. Its most significant shares of the local arms market (greater than one-third) were among former French colonies, such as Senegal, Benin, and Mozambique.[185] French troops and military bases were a fixture in West Africa since 2013 to combat terrorism and extremism (e.g., Operations Serval and Barkhane).[186] However, African public dissatisfaction with a worsening security situation, accusations of "neocolonial overreach," and a series of military coups strained relations with France.[187] West African leaders retreated from prior cooperation agreements with France, and French troops exited their last military base in the region in July 2025.[188] Russia's growing presence has captured the most media attention in France's absence, but West African leaders want to recalibrate their partnerships, rather than simply substituting Paris with Moscow. This has created opportunities for non-traditional security players like Türkiye, the United Arab Emirates, China, and even Hungary to engage.[189] France may still play an important security assistance role, but most likely in other geographies such as Egypt, India, Ukraine, and the Middle East, which were also major recipients of French arms over the last decade.[190]

Türkiye: Religion, rather than income, has been a commonality across the major recipients of Türkiye's security assistance. Countries with Muslim majority populations attracted most of Türkiye's arms transfers, in keeping with the pan-Islamic and pan-Turkic emphasis of President Recep Tayyip Erdoğan's foreign policy.[191] Support for Muslim or Turkic minorities and diaspora communities was a feature of Türkiye's engagement with Ukraine,[192] Georgia, Poland,[193] and the Philippines.[194] However, Ankara's security assistance is not exclusively shaped by shared religious and ethnic ties. It pursues a "triangular balancing act," maintaining economic and diplomatic ties with Russia, defense cooperation with NATO, and shoring up non-NATO allies.[195] Countries that host Türkiye's bases, such as Qatar and Iraq, were among the top recipients of its arms capability transfers. Türkiye has a growing profile in Africa, which has a strong appetite for Turkish-made drones and conventional weapons,[196] brokering security agreements with 30 African countries in areas from technical and scientific cooperation to joint exercises and training military and civilian security personnel. The Turkish PMSC, SADAT, has operated in Africa since its 2013 involvement in Libya's civil war, offering protection, advisory, and training services in Somalia and the Sahel.[197]

United Arab Emirates: Like Türkiye, the UAE prioritizes arming religiously like-minded countries: 13 of the 16 top recipients of its arms capability transfers over three decades were home to majority Muslim populations.[198] Nearby Egypt and Jordan attracted the most attention, but the UAE is expanding its reach farther afield, particularly in sub-Saharan Africa. Ankara has bankrolled sizable investments in critical infrastructure projects (e.g., energy, ports, extractives), alongside multi-faceted security assistance spanning arms, training, and joint operations in 8 of 12 East African countries.[199] These deals have enabled the UAE to quietly build up ownership and long-term access rights to dual-use ports in Djibouti, Eritrea, Somalia, Sudan, Somaliland, and Tanzania.[200] The UAE uses its PMSCs as "commercial surrogates" which engage in a range of security-related activities focused on anti-piracy in Somalia, countering the Houthis insurgency in Yemen, and supplying paid mercenaries for Libya's National Army forces.[201] Its PMSCs have a direct line to the UAE's Crown Prince, which allows the regime to readily deploy private armies to advance the state's interests.[202] In Africa, the UAE and other non-traditional security assistance providers are attractive components for a hedging and diversification strategy, as they offer ample resources with minimal strings, and increase their negotiating room with great powers like the U.S., China, and Russia.[203]

Israel: Israel has made "arms diplomacy" front and center of its foreign policy overtures with countries like the Philippines, Myanmar, Thailand, Vietnam, and Indonesia.[204] Israel has long supplied weapons to other countries, but its security exports globally have boomed over the last decade and a half, growing from US$7.4 billion in 2009 to US$13.1 billion by 2023 (a 77 percent increase).[205] Tel Aviv has received a relatively less hostile welcome in Southeast Asia than it has in other parts of the world, where it was criticized over the Israel-Palestine conflict. While there have been expressions of public discontent and even government rhetoric may officially denounce Israel's actions, there remains a strong appetite in Southeast Asia for Israeli security assistance. Israel is a useful part of a hedging and diversification strategy for countries wary of a rising China: it offers relatively sophisticated weapons systems for purchase, casts a blind eye towards recipients' human rights credentials, and willingly pursues joint ventures and localized production of export variants of its arms in the region.[206] However, there are indications that Southeast Asian countries may want more concessions to secure their continued status as a growing consumer base for Israeli arms. For example, the Philippines recently signaled that it would make new arms deals contingent upon Israel backing its claims in the South China Sea to strengthen its leverage with Beijing.[207]

5. Conclusion

China and Russia are assumed to be indiscriminate suppliers of security assistance, as compared with the U.S.; however, the reality is more complex. Beijing, Moscow, and Washington have all proven willing to supply arms and training to varied partner countries regardless of their human rights and governance track records. Several of the largest Global South recipients of U.S. arms are not free or partly free according to the Freedom in the World index published by Freedom House. Moreover, a growing share of participants in U.S. joint exercises are autocracies.

Still, China and Russia demonstrate a higher tolerance than the U.S. when it comes to the final destinations for its arms and the use cases for dual-use technologies. The U.S. requires approval for any transfers of its military kit to third parties, while China and Russia do not require end-user certificates, allowing weapons to be resold to unknown entities. Beijing and Moscow have attracted scrutiny over their willingness to export dual-use technologies and surveillance practices which enable authoritarian regimes to repress their own citizens.

China and Russia are seen as one-stop shops. Chinese and Russian firms can export nearly all categories of conventional weapons. China does not participate in international arms control pacts such as the Wassenaar Arrangement and Missile Technology Control Regime.[208] Russia tokenistically participates in these regimes but willfully disregards the rules. Both are go-to suppliers of dual-use technology for partner nations' domestic security. There are complaints

about quality and ease of maintenance as recipient countries have had to shelve or ground weapons from both suppliers due to difficulties getting replacement parts, structural deficiencies, or a lack of capacity to service them locally.

For resource-constrained economies, Russia and China offer more affordable equipment with less stringent conditions. They provide cheaper weapons with flexible financing terms via loans and export credits. Countries trade access to commodities for military hardware and policing technologies. Beijing and Moscow also donate equipment for civilian law enforcement agencies as in-kind support to build goodwill and cultivate influence. A common complaint is that Beijing only exports less advanced technologies, holding back more advanced systems for use at home. Nevertheless, Pakistan's recent conflict with India showcases that China is willing, under certain circumstances, to export some of its more sophisticated technologies to its closest partners, shrinking the technological gap. In fact, the relatively poor performance of Russian weaponry in the Pakistan-India dispute, along with the Kremlin's challenges in its conflict with Ukraine, may reset the calculus for Global South countries to source Chinese hardware at Russia's expense.

Compared to the U.S., China and Russia are seen as more friendly to the interests of Global South countries in bolstering their domestic defense industries. They are willing to support technology transfer by localizing production of critical systems (albeit still relying on Chinese or Russian technology, systems, and standards). They pursue joint ventures with local firms to co-create products and develop export variants for resale to third countries. The response to China's interest in joint venture private security companies and the activities of Russian private military contractors in supporting local militias or dictators has been mixed.

Both China and Russia have been more deliberate, than the U.S., about exploiting synergies within the security assistance toolbox and with other aspects of foreign policy. Technology transfers generate arms revenues in third countries. Expos, joint exercises, and hosting regional and global security fora bolster political and diplomatic credibility. Russia uses security as a door-opener to broker economic deals to mitigate growing international isolation due to U.S. sanctions. China uses economic leverage to require greater security cooperation to protect its BRI investments. Beijing's October 2025 announcement of new export restrictions on rare earth metals could fuel demand for its arms as China's competitors deal with supply chain difficulties. China enjoys a near monopoly of more than 90 percent of rare earth mining, separation, and processing that are critical to weapons manufacturing.

Amid discussions of great power competition, U.S. policymakers might be tempted to focus exclusively on countering security assistance offers of Russia and China. This would be a mistake for the assistance marketplace has become more heterogenous, and Global South leaders seek overlapping security relationships to hedge their risks and navigate geostrategic competition. Traditional suppliers like Russia[211] and France[212] have experienced disruptions in their network of security assistance partnerships. Non-traditional players like Türkiye, Israel, and the United Arab Emirates, among others, expand the options available for Global South. Diversification is easier said than done, however, as lack of interoperability and security concerns create a forced choice: it is difficult for countries to mix and match equipment from multiple suppliers.

5.1 Policy Recommendations

- **Recommendation #1. Deliver security assistance with the end in mind: prioritize long-term partner capacity over short-term arms sales to address concerns about U.S. reliability.** Explore joint ventures and technology transfer incentives to be responsive to the desire of local governments to build their domestic defense industries. Condition future security assistance on demonstrated progress against security sector reforms and strengthening civilian institutions. Incorporate theory and practice in capacity building through blending access to formal professional military education with application through joint operations, training exercises, and other peer-to-peer knowledge exchange.

- **Recommendation #2. Exploit disruptions in Russian supply chains to expand American presence in less dominant markets and dilute competitor influence on partner nations.** Maintain sanctions pressure on third countries to reconsider the increased transaction costs of doing business with Russia. Identify Russia-dominant or battleground countries (no one power has yet claimed a dominant stake) of strategic interest to the U.S. and propose attractive counteroffers (e.g., integrating technology transfer, joint ventures, economic deals) for the Kremlin's dissatisfied customers before they jump to China as a substitute.

- **Recommendation #3. Spotlight hidden costs and quid-pro-quo obligations of competitor security assistance offers to counter perceptions that the alternatives are good enough.** Conduct a thorough comparative assessment of the competitiveness of America's security assistance programs (e.g., arms, technology, training) relative to foreign alternatives offered

by traditional and emerging players. Communicate the lifetime cost-benefit ratio for arms, considering not only the initial purchase price but also hidden costs of ongoing maintenance and early retirement of lesser quality systems. Raise awareness about how competitors may use economic leverage to access critical infrastructure, exploit unseen backdoors in dual-use technologies, and take advantage of vulnerabilities in local governance in ways that undercut partner nations' long-term national security.

- **Recommendation #4. Pool resources and expertise with international partners to mitigate dependence on Chinese-sourced rare earth elements for domestic weapons industries.** Broker joint venture partnerships with international allies and partners to mobilize capital and technical knowledge necessary for rare earth exploration and processing. High potential partners include countries with sizeable known rare earth reserves (e.g., Australia, Brazil, India, Saudi Arabia, Vietnam), along with Canada who is actively exploring new deposits.[213]

5.2 Discussion Questions

- What unique areas of comparative advantage does the U.S. already have, or could it develop in the future, as part of its security assistance offer in the Global South?
- What are the most persistent and problematic counternarratives about the U.S. security assistance offer that have taken root within low- and middle-income countries?
- How might the U.S. incorporate technology transfer, localized production, and joint ventures in its arms transfers in ways that are a win-win for partner nations and American interests?
- How might the U.S. better synergize its economic statecraft and security assistance toolkit to increase its attractiveness and influence in partner countries?
- In what ways do competitor-dominant security assistance markets create vulnerabilities for U.S. interests and those of partner countries? How could the U.S. best mitigate these risks?
- What areas of low-hanging fruit might exist for the U.S. to cooperate with like-minded allies to improve its security assistance offer for low- and middle-income countries?

- How might U.S. security assistance be better designed and delivered to plan for long-term partner capacity rather than dependence on U.S. financing or troops on the ground? Under what conditions should the U.S. exit or enter a security assistance relationship?

Endnotes

1. The author acknowledges helpful peer review comments by Dr. Jonathan Solis (AidData), William & Mary Chancellor Robert M. Gates (Gates Global Policy Center), Mr. Blaise Misztal (JINSA), Mr. Paul Nantulya (Africa Center for Strategic Studies), Dr. Sheena Chesnut Greitens (University of Texas-Austin), among others, on a draft of this article. Mr. Bryan Burgess and Mr. John Custer (AidData) provided useful data and visual inputs.
2. Security assistance suppliers hail from all regions and income levels, according to the Stockholm International Peace Research Institute (SIPRI). SIPRI. Arms Industry Database, https://www.sipri.org/databases/armsindustry.
3. This paper follows the same definitional convention to a similar paper for the previous Gates Forum on Sanctions. See Custer, S. (2024). *U.S. Sanctions and the Global South: Navigating Networked Resistance, Competing Narratives, and Unintended Consequences*. In: Sanctions and the Symphony of Power: Revitalizing American Economic Statecraft. AidData and William & Mary's Global Research Institute: Williamsburg, VA.
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5. Only twenty suppliers each controlled more than 1 percent of arms transfers globally over the last decade. SIPRI. Arms Industry Database.
6. The SIPRI database considers the volume of transfers (e.g., count of orders, quantity of weapons) and the capability transferred through these deliveries (e.g., trend-indicator-value). TIV assesses the value of "the known unit production costs of a core set of weapons" and considers factors such as "size and performance characteristics (weight, speed, range and payload); type of electronics, loading or unloading arrangements, engine, tracks or wheels, armament and materials; and the year in which the weapon was produced". Not a financial value, per se, TIV is the best available measure to compare "transfers of military capability" between different suppliers and recipients. Ibid.
7. SIPRI, Arms Industry Database.
8. Thirteen of the 28 recipients that accounted for more than 1% each of U.S. capability transferred (TIV) were OECD countries including Australia, Canada, Germany, Greece, Israel, Italy, Japan, Netherlands, Norway, Poland, South Korea, Türkiye, United Kingdom. Ibid.
9. Eighteen of the 28 recipients that accounted for more than 1% each of U.S. capability transferred (TIV), host U.S. military bases including Australia, Bahrain, Egypt, Germany, Greece, Italy, Iraq, Japan, Kuwait, Norway, Poland, Qatar, Saudi Arabia, South Korea, Japan, Singapore, Türkiye, United Arab Emirates, United Kingdom.
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111. The four BRICS+ countries include: Egypt, Iran, Indonesia, and Saudi Arabia. The two SCO members were Iran and Pakistan.
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204. Salman, Y. (2025). Arms Diplomacy and Human Rights: The Case of Israel's Relations With the Philippines and Myanmar. *Journal of Asian and African Studies*, *0*(0). https://doi.org/10.1177/00219096251359244. Ningthoujam, A.S. (2020). The Military-Security Dimension of Israel-Southeast Asia Relations. January 7, 2020. Middle East Institute. https://mei.edu/publications/military-security-dimension-israel-southeast-asia-relations; Othman, S.A. (2025). An Uncomfortable Truth: Israel Among Us in Southeast Asia. March 3, 2025. Independent News Service. https://theins.news/postview/2530-an-uncomfortable-truth-israel-among-us-in-southeast-asi a
205. Salman, Y. (2025). Arms Diplomacy and Human Rights: The Case of Israel's Relations With the Philippines and Myanmar.
206. Ningthoujam, A.S. (2020). The Military-Security Dimension of Israel-Southeast Asia Relations.
207. The New Arab. (2025). Philippines conditioning arms deals with Israel on South China Sea recognition: report. May 21, 2025. https://www.newarab.com/news/philippines-pressing-israel-take-sides-dispute-china
208. Nantulya, P. (2025). China Widening its Influence in Africa through Expanded Security Engagements. Africa Center for Strategic Studies. June 10, 2025.

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[211] The war in Ukraine has disrupted supply chains, distracted the Kremlin's attention, and increased the costs (through exposure to U.S. sanctions) of doing business with Moscow, such that Global South countries are rethinking Russia's reliability.

[212] Strained relations with its former colonies in Francophone Africa, related to worsening security and accusations of neocolonial overreach, prompted France's withdrawal from its military bases in the region in the last few years.

[213] Barskaran, G. and M. Schwartz. (2025). Developing Rare Earth Elements Hubs: An Analytical Approach. Center for Strategic and International Studies. July 28, 2025. https://www.csis.org/analysis/developing-rare-earth-processing-hubs-analytical-approach#h2-identifying-ideal-partners-for-investment-in-international-midstream-hubs

Background Research - Paper 6

Gates Forum IV

Understudied But Growing: Chinese Military and Security Cooperation in Africa

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Executive Summary

China's role as a security actor in Africa is longstanding but frequently overlooked. China's People's Liberation Army (PLA) trained anti-colonial and anti-apartheid movements from the 1950s and worked with independent countries to build regular militaries, making Africa its first theater of overseas security cooperation. Although engagement waned during the Cultural Revolution and again in the late 1990s, Beijing reemerged with renewed vigor through the Forum on China–Africa Cooperation (FOCAC) in 2000. This framework institutionalized and routinized China–Africa relations, creating a platform for rapid expansion in economic, political, cultural, and security domains.

Today, Chinese security cooperation in Africa is comprehensive and multi-layered. The PLA operates its first overseas base in Djibouti, learning lessons for its future basing needs, sustains naval task group rotations in the Gulf of Aden off the Somali coast, and contributes more peacekeepers than the other permanent members of the UN Security Council combined, mostly in Africa. Professional Military Education (PME) has become a centerpiece of China's engagement, with thousands of African officers enrolled annually in Chinese academies under generous training packages. The Ministry of Public Security (MPS) has also emerged as a critical actor, training African police, exporting surveillance systems, and promoting Beijing's Global Security Initiative (GSI).

China has become a leading supplier of affordable defense equipment, providing 70 percent of African militaries with armored vehicles, Unmanned Aerial Vehicles (UAV), and other systems. Case studies of Algeria and Kenya highlight Beijing's tailored approach—with liberation movements that had longstanding contact with the Chinese Communist Party (CCP) and the PLA, and countries that were more aligned with Western powers and whose ties to China were traditionally weak and oftentimes conflictual.

Overall, China's security cooperation has five distinctive features: 1) Reinforcing economic and other non-military lines of effort, 2) Cementing the party in power regardless of political inclinations, 3) Establishing elite access both in democratic and undemocratic settings, 4) Embedding Chinese norms and practices to shape African security architectures and policy choices, and 5) Challenging U.S. influence. In return, China hopes to: 1) Secure sustained African political support for its global ambitions and initiatives, 2) Cultivate greater willingness by African countries to advance its interests, 3) Position itself as a partner of choice in affordable military hardware, training, education, and technologies, and 4) Dissuade African countries from efforts to either isolate China or undermine its global interests.

China's routine, institutionalized, and growing security engagements in Africa blunts U.S. influence, particularly in PME and other areas like UAV technologies, surveillance systems, construction of sensitive military facilities, and overall foreign aid, which almost always includes security packages. The U.S. need not match China's investments dollar-for-dollar but can leverage its strengths in highly sought-after education and training, innovation, unscripted professional exchanges, and world class leadership development. Expanding PME slots through pooled mechanisms with allies, fostering co-investment and burden sharing models with them, and sending more U.S. officers to study in African PME institutions and build partnerships are some cost-effective ways to compete. Smart, collaborative, and demand-driven engagement could sustain U.S. influence without replicating China's model.

Introduction

China is not a new security actor in Africa. Most African countries have had longer contact with China's PLA than most Western militaries. After fighting in the 1950-53 Korean War, the PLA's next foreign assignment was to train and equip anti-colonial and anti-apartheid African movements.[1] By 1963, when the Organization of African Unity (OAU) was formed, China had a fully-fledged military cooperation program in place—its first after Korea.

China is frequently described as focusing on countries rich in extractives or in key nodes in its ambitious program to construct new economic corridors linked to the Chinese economy known as the Belt and Road Initiative (BRI). However, China has strong security ties in non-resource rich countries like, Kenya, Rwanda, Senegal, the Seychelles, and Lesotho. The same is true of other landlocked countries that don't feature prominently in the BRI, like Rwanda, South Sudan, Uganda and Zimbabwe among others. While economic calculations undoubtedly shape China's calculations, other factors like historical ties, strategic location, and strategic competition are equally important.

The first part of this study examines the evolution of China's security and military and military cooperation. Next, it uses case studies to illustrate how key concepts were applied in practice. It then discusses PME as a key area in which China is outpacing the U.S. and other Western powers in Africa. It then discusses policy implications and options.

Tracing Chinese Security Cooperation in Africa

1955-1966: Growth and Consolidation

Shortly after the founding of the People's Republic of China (PRC) in 1949, the CCP instructed the PLA to "resolutely support the African struggles against colonialism."[2] African fighters started arriving in China for military training as early as 1957. [3] By the 1960s China had trained around 40 African movements in its military institutions and the continent.[4] From December 13, 1963, to February 5, 1964, then Chinese Premier, Zhou En Lai and Vice Premier He Long visited 10 African and six Asian countries to "revive the Bandung spirit."[5] The mood of the times is captured by a comment by a Mozambican guerilla in 1971: "It is Chairman Mao who has changed our mental outlook, strengthened our fighting will, and taught us how to fight."[6]

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[1] The Stimson Center, dir, Zhou Bo: How Many Military Bases Does Beijing Need? (Washington DC, The Trialogue), https://www.youtube.com/watch?v=6aAMtySRhS8

[2] Lefkowitz, Melissa. "Revolutionary Friendship: Representing Africa During the Mao Era." China-Africa Relations: Building Images through Cultural Cooperation, Media Representation, and on the Ground Activities (China Policy Series), Routledge, 2017.

[3] Cook, Alexander C. "Third World Maoism." Chapter. In A Critical Introduction to Mao, edited by Timothy Cheek, 288–312. Cambridge: Cambridge University Press, 2010.

[4] Eisenman Joshua (2018) "Comrades-in-Arms: The Chinese Communist Party's Relations with African Political Organizations in the Mao era, 1949–76," Cold War History 18, no. 4:429-445

[5] Legum, Colin. "Guerilla Warfare and African Liberation Movements." *Africa Today* 14, no. 4 (1967): 5–10. http://www.jstor.org/stable/4184810.

[6] Nantulya, Paul, "Tanzania and China: Old Comrades in Arms," (Forthcoming).

1967-1974: The First Slump

The Cultural Revolution (1966-1976) saw extensive purges in the Chinese government, party, and military. One third of all Chinese embassy staff and Ambassadors in Africa were recalled in 1967 for "re-education."[7] They were replaced by less experienced diplomats focused more on "weeding out traitors" than consolidating ties.

This tumultuous period overlapped with the Sino-Soviet split, which intensified in the late sixties. China pressured African movements seeking aid from it to sever ties with the USSR. China also supported smaller splinter groups against Soviet-backed movements, which sharpened infighting among them movements. Many movements were unwilling to ditch Russia, however, as its economic and military aid were of a scale that China, then a poor country, could not match. Some relocated their fighters to Russia, a major blow to China at the time.

Examples of movements that switched from Peking to Moscow include South Africa's African National Congress (ANC) and the Popular Movement for the Liberation of Angola (MPLA).[8] China in turn backed their rivals, the Pan Africanist Congress of South Africa (PAC) and Union for the Total Liberation of Angola (UNITA), respectively—a policy it followed with other OAU recognized movements that received Russian support. This dented China's prestige. Indeed, between 1965 and 1970, no additional newly independent African country established relations with Peking. Premier Zhou En Lai described this downturn in the following terms, "We have much less understanding with Africa than we did in 1963, 1964, and 1965."

1971-1982: The First Revival

China regained lost ground after reestablishing stability at home. It reorganized its economic and military aid and stopped asking its partners to denounce the Soviet Union.[9] By the mid-1970s, China's aid program in Africa was larger than that of the U.S.[10]China also abandoned its earlier policy of backing proxies to just having friendly relations.[11] This paid major dividends. In 1971, African countries held the decisive vote that admitted the PRC into the United Nations (UN).[12]

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[7] Eisenman, Joshua (2018), "Comrades-in-Arms: The Chinese Communist Party's Relations with African Political Organizations in the Mao era, 1949–76," Cold War History 18, no. 4:429-445

[8] Voevodskiy, Alexandr. "7 The Sino-Soviet Split"

[9] Shinn, David H., 'China–Africa Ties in Historical Context', in Arkebe Oqubay, and Justin Yifu Lin (eds), China-Africa and an Economic Transformation (Oxford, 2019; online edn, Oxford Academic, 20 June 2019), https://doi.org/10.1093/oso/9780198830504.003.0004, accessed 1 July 2025

[10] Brautigam Deborah (2010), China, Africa and the International Aid Architecture, African Development Bank, https://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/WORKING%20107%20%20PDF%20E33.pdf

[11] Nantulya, Paul (2023), Chinese Professional Military Education for Africa: Key Influence and Strategy, United States Institute of Peace, Special Report, No 521, https://www.govinfo.gov/content/pkg/GOVPUB-Y3_P31-PURL-gpo222444/pdf/GOVPUB-Y3_P31-PURL-gpo222444.pdf

[12] Shinn, David H., 'China–Africa Ties

26 African countries—led by Tanzania—voted for Beijing; only 15 voted with Taipei. 10 of the 15 countries that supported Taiwan shifted recognition to Beijing a few years later. By 1980, 44 African countries recognized Beijing (currently all African countries apart from Eswatini recognize Beijing).[13]

China's aid projects sent a powerful message that China was back in Africa in a significant way and stood in solidarity with African causes. One such project is the 1,860-kilometer (1,067 mile) Tanzania-Zambia (TAZARA) Railway, also called the "Uhuru" (Freedom) Railway—China's most expensive project at the time, and which is now being refurbished and upgraded at the cost of $1 billion[14] Completed in 1975, it connects landlocked Zambia at Kapiri Mposhi to Tanzania's Dar-Es-Salaam port. China seized on the opportunity after the World Bank, U.S., United Kingdom (UK), Japan, and the USSR, declined to fund it.

TAZARA advanced Southern African liberation struggles by reducing the dependence of the anti-apartheid Frontline States Alliance, co-led by Tanzania and Zambia, on the economic, transport, and logistics infrastructure of apartheid South Africa and colonial Zimbabwe (Rhodesia). This restored China's image as an ally of African countries. According to former OAU Secretary General and Tanzanian Prime Minister, Ahmed Salim Ahmed, "Now China has become a very important pillar of South-South cooperation. And of course, the Freedom Railway was an eloquent manifestation in very difficult times."

1979-1989 The Second Slump

Africa was largely marginalized in the decade leading to the end of the Cold War. China's new Paramount Leader, Deng Xiaoping, prioritized rapid economic modernization and attracting Western foreign direct investment. African countries played a minimal role in both endeavors. Under Deng, China's annual economic, development, and military aid to Africa dropped to $94 million, down from $319 million from 1976–1980. [15] Trade volumes sank from 10 percent in the 70s to under four percent in the 90s.[16] The high politics of global competition that characterized China's Africa policy in the 50s shifted to purely commercial engagement. China was also inward-looking. As Deng observed, "some developing countries would like China to lead the third world, but we absolutely cannot do that, and besides, we aren't strong enough. There is nothing to be gained by playing that role."

The PLA underwent a major reorganization, diverting its attention from training foreign officers. As African student numbers in Chinese military schools plummeted, enrollment in US programs rose. Notably this included former liberation movements which initially had limited contact with the U.S.

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[13] Sun Yun, (2014), China's Aid to Africa: Monster or Messiah? Commentary, Brookings Institution, https://www.brookings.edu/articles/chinas-aid-to-africa-monster-or-messiah/

[14] Nantulya, Paul, Lucie Béraud-Sudreau, David Brewster, Christopher Cairns, R. Evan Ellis, April Herlevi, Roderick Lee, Meia Nouwens, Rebecca Pincus, and Joel Wuthnow. "'Only with Deep Roots Can a Tree Yield Rich Fruit:': The People's Liberation Army in Africa." Edited by Roger Cliff and Roy D. Kamphausen. Enabling a More Externally Focused and Operational PLA — 2020 PLA Conference Papers. Strategic Studies Institute, US Army War College, 2022. http://www.jstor.org/stable/resrep42811.7

[15] Jindong Yuan, Fei Su, and Xuwan Ouyang(2022). China's Evolving Approach to Foreign Aid, Stockholm International Peace Research Institute. Sweden. Retrieved from https://coilink.org/20.500.12592/2pbp7f on 03 Jul 2025. COI: 20.500.12592/2pbp7f.

[16] Shinn, David H., 'China–Africa Ties

Between 1985 and 1992, the US International Military Education Program trained 3,408 African military professionals.[17] China trained less than a third of that number over the same period. [18]

1992 to 2018: The Second Revival

China pivoted back to Africa and the Global South after incurring sanctions and embargoes from the West over the PLA's crackdown on student protestors in Tiananmen Square in June 1989. These coincided with civic revolutions that toppled communist regimes in Europe and the USSR itself. China's leaders believed the West would bring those revolutions to its doorstep. According to Deng Xiaoping "there are many who would like to see China develop but there are others who are out to get us."[19]

Faced with protests from their own citizens against one party rule, many African leaders found common cause with China against the West, with some even sending messages of support.[20] China reciprocated by building networks of solidarity in Africa to circumvent its isolation. In 1991, then Chinese foreign minister. Qian Qichen visited 14 African countries, echoing Zhou En Lai's two-month visit during the Mao years. Since then, every Chinese foreign minister has visited 4-5 African countries at the start of every year as the first major item on China's diplomatic calendar.[21]

This upward trajectory culminated in the creation of FOCAC in October 2000—China's first regional multilateral organization. This returned China's Africa policy to the high politics of global competition reminiscent of the Mao Zedong era, with the U.S. once again the central focus of China's concept of strategic competition. As shown in Annex 1, China leveraged FOCAC to surpass the U.S. in nearly every metric: critical infrastructure, government tenders, trade volumes, port developments, Foreign Direct Investment (FDI), education of African students, professionals, officials, and leaders, number of cultural institutes, media presence, and mineral supply chains and refining.

In 2000, China lagged far behind the U.S. in each of these 10 sectors; that had changed by the 7th FOCAC Summit in 2018. By this time, China was also enrolling 2,000 African military officers annually in its military schools, up from less than 200 in 2000. Back then, the U.S trained triple that number.

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[17] "Recommendations to the U.S. Government for the Promotion of Human Rights in Africa," *Amnesty International* (1998), https://www.amnesty.org/es/wp-content/uploads/2024/02/afr010011998en.pdf

[18] Nantulya, (2023), "Chinese Professional Military Education in Africa,"

[19] Xiaoping, Deng (2012), The Selected Works of Deng Xiaoping, trans and ed, Intercultural Press (Beijing).

[20] Large Dan, Alden Chris, de Oliviera Ricardo Soares, "China Returns to Africa: Anatomy of an Expansive Engagement," *Real Instituto Elcano*, Working Paper No 51, 2008, https://media.realinstitutoelcano.org/wp-content/uploads/2021/11/wp-51-alden-large-soaresdeoliveira-china-africa-engagement.pdf

[21] Olander Eric, "China's Leaders Spend a Lot of Time in Africa, Where They Go May Surprise You," *China Global South Project*, Interview with Hannah Ryder, CEO of Development Reimagined, February 10, 2018, https://chinaglobalsouth.com/podcasts/podcast-china-africa-visits-hannah-ryder/

2018- Beyond: Consolidating China's Rise

FOCAC has fostered deeper levels of policy coordination between China and African countries, closer coordination in multilateral domains, and shared perspectives on global reform. African countries have also increased their participation and membership in China's alternative global organizations.

China's security cooperation has grown alongside these general trends. In 2017, the PLA Navy opened its first known overseas base in Djibouti. It is a dual-use facility that started out as a commercial port that was upgraded for military purposes.[22] Questions have been raised as to whether dual use basing, which closely aligns with China's operational patterns of behavior, can be replicated elsewhere in Africa. As of 2025, Chinese state-owned firms were involved in an estimated 78 ports across 32 African countries as builders, financiers, or minority and majority operators.[23] This represents over a third of all African port developments, a significantly greater Chinese presence than anywhere else in the world and a major component of China's BRI.[24]

China's base in Djibouti increased the regularity and complexity of the PLA's joint drills with African countries. Indeed in 2018, the PLA conducted six exercises, the highest in a single year, and started participating in other multinational exercises hosted by African countries.[25] The base also marked an evolutionary step in the PLA's continuous deployments of anti-piracy Naval Task Groups (NTGs) in the Gulf of Aden off Somalia's coast since 2008. These missions, which increased in duration, tempo, and sophistication, are China's first operations outside the Western Pacific.[26]

Senior Colonel (Ret.) Zhou Bo, commander of the PLA's Naval Task Groups from 2009-2015, describes them as a "stepping stone" for China's "far seas operations" a term the PLA uses for overseas power projection.[27] He explains that after each rotation, 45 in number by 2025, the Task Groups sail around the world to familiarize themselves with uncharted waters, including in the Atlantic, Mediterranean, and Baring seas. "Sometimes it could even last for 10 months. So that is why we are making progress in our own way, without fighting a war."

African countries have also been a "proving ground" for the PLA in terms of building field experience in peacekeeping operations. China initially shunned these as tools of Western hegemony but later embraced them to burnish its global leadership credentials.[28]

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[22] Paul Nantulya "Considerations for a Prospective New Chinese Naval Base in Africa," Africa Center for Strategic Studies, (May 12, 2022), https://africacenter.org/spotlight/considerations-prospective-chinese-naval-base-africa/

[23] Nantulya Paul, "Mapping China's Strategic Port Development in Africa," Africa Center for Strategic Studies, (March 10, 2025), https://africacenter.org/spotlight/china-port-development-africa/

[24] Nantulya "Mapping China's Strategic Port Development in Africa,"

[25] Paul Nantulya, "The Growing Militarization of China's Africa Policy," Spotlight, Africa Center for Strategic Studies, (December 2, 2024), https://africacenter.org/spotlight/militarization-china-africa-policy/

[26] Center for the Study of Chinese Military Affairs, Chinese Military Diplomacy Database, version 4.98 (Washington, DC: National Defense University, August 2024).

[27] Nantulya, "The Growing Militarization of China's Africa Policy"

[28] Nantulya Paul, "Developing Countries are the Foundation: The Peoples Liberation Army Reaches out to Africa," in George R. Shatzer and Joshua M. Arostegui, ed., Decisive Decade: PRC Global Strategy and

Since 2015, China has contributed more troops to UN missions than the other permanent members of the UN Security Council combined. China relied on African experience to build its capacity because not only do 78 percent of all UN peacekeepers serve in Africa, but nearly half of them are African. China is also the second largest contributor to the UN peacekeeping budget and the overall UN budget after the U.S.[29] Beyond this, China's PLA has conducted 23 military exercises, 51 naval port calls, and 320 senior defense exchanges in Africa since 2000.[30] China has also deployed 24 military and civilian medical teams on 1–2-year rotations in over 48 countries.

Less noticeable but no less important are China's domestic security engagements, which occur with greater frequency than those of the PLA. At least 2,000 African police personnel trained in China between 2018 and 2021. The current FOCAC 2025-2027 Action Plan envisions training 1,000 more. In October 2024, China's MPS provided an additional 5,000 training opportunities to Global South countries. This will likely increase the African numbers.[31]

China's leaders have increasingly turned to their police and law enforcement agencies and security firms to fulfil external security demands due to their continuing aversion to putting boots on the ground.[32] The MPS trains thousands of African police forces and has agreements with dozens of African countries on extradition and joint law enforcement. African countries are also important customers of Chinese national security wares, borrowing $3.5 billion for such purposes between 2003 and 2017 alone.[33] Currently, China supplies 70 percent of Africa's digital infrastructure, which includes surveillance technologies. As of 2025, 22 African countries had contracted Chinese firms like Huawei to develop such systems.[34]

China has used its public security engagements to position itself as a powerful ally committed to the survival of its closest partners, especially those preoccupied with regime stability. In exchange for strengthening their enforcement machinery, China procures more influence and enhances its preferential status. The systems it provides are relatively affordable and have fewer end user conditionalities. Since 2022, China's public security engagements have been branded under the GSI, its latest effort to promote alternative security paradigms and practices.[35]

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the PLA as a Pacing Challenge – 2023 PLA Conference – Updated and Expanded (Carlisle, PA: US Army War College Press, 2024), https://press.armywarcollege.edu/monographs/966

[29] Fung, Courney, "China's Small Steps into UN Peacekeeping Are Adding Up," IPI Global Observatory, May 24, 2023, https://theglobalobservatory.org/2023/05/chinas-small-steps-into-un-peacekeeping-are-adding-up/

[30] Nantulya, "The Growing Militarization of China's Africa Policy"

[31] Paul Nantulya, "Africa as a Testing Ground for China's Global Security Initiative," Africa Center for Strategic Studies, (August 4, 2025), https://africacenter.org/spotlight/africa-china-global-security-initiative/

[32] Paul Nantulya, "China's Growing Police and Law Enforcement Cooperation in Africa," in Nadege Rolland, ed, Political Frontlines: China's Pursuit of Influence in Africa, (June 1, 2022), https://www.nbr.org/publication/chinas-growing-police-and-law-enforcement-cooperation-in-africa/

[33] Paul Nantulya, "China's Policing Models Make Inroads in Africa," Africa Center for Strategic Studies, (May 22, 2023), https://africacenter.org/spotlight/chinas-policing-models-make-inroads-in-africa/

[34] Bulelani Jili, "The Spread of Surveillance Technology in Africa Stirs Security Concerns," Africa Center for Strategic Studies, (December 11, 2020), https://africacenter.org/spotlight/chinas-policing-models-make-inroads-in-africa/

[35] Nantulya, "Africa as a Testing Ground for China's Global Security Initiative"

Notably, China's MPS was central in creating the GSI and mainstreaming it into China's security assistance. It helped create FOCAC's China East Africa Ministerial Conference on Law Enforcement and the China Africa Police and Law Enforcement Forum.[36] In September 2024, the MPS signed a Memorandum of Understanding (MOU) with the 14 member states of the East African Police Chiefs Cooperation Organization. It has similar arrangements with the Southern African Regional Police Chiefs Co-operation Organization (SARPCOO).

What China Gains From its Security and Military Cooperation in Africa

China has used its security assistance to generate influence in different ways. It moved swiftly to cultivate deep security ties with the Southern African movements that switched sides to the Soviet Union or severed ties with China for backing their rivals. China employed a similar strategy to build trust with South Sudan's Sudan People's Liberation Movement (SPLM) which was suspicious of Beijing's longstanding backing of successive Khartoum governments during their 50-year civil war. China's security assistance packages also deepened relations with countries like Burkina Faso, Cameroon, Kenya, Tunisia, Zaire (Democratic Republic of Congo), Liberia, and Senegal that had either severed or suspended ties with Beijing, or recognized Taiwan at different points. Indeed, countries that previously had poor relations with China are now some of its strongest military and security partners.

China's military and security engagements have also strengthened access to top officials, policymakers, and military and security sector leaders. China offers them security hardware with few conditionalities and flexible terms, generous training and education packages, and extensive support for their party-political projects. They in turn offer support to advance and protect Chinese interests in different ways, from acceding to extradition requests, to giving access to their security facilities, and even deploying their own forces to interdict threats to Chinese investments.[37]

China has also had some success in socializing and winning support for its institutional and norm-building efforts. African countries first endorsed the GSI at the 8th FOCAC Implementation Meeting in 2022, for instance. This was formalized at the 9th FOCAC Summit in 2024. Since then, GSI integration has featured in every new bilateral agreement between China and African countries and is one of the pillars of FOCAC's 2024-2027 Action Plan.[38]

China has positioned itself as a partner of choice in niche areas. As of 2025, 70 percent of Africa's militaries operate Chinese armored vehicles.[39] Key considerations include affordability, customization, filling market gaps, and broader strategic partnerships. Chinese UAVs have also found a large market in Africa.[40]

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[36] Nantulya, "Africa as a Testing Ground for China's Global Security Initiative"

[37] Nantulya, "Africa as a Testing Ground for China's Global Security Initiative"

[38] Nantulya, "Africa as a Testing Ground for China's Global Security Initiative"

[39] Paul Nantulya, "China Widening Its Influence in Africa through Expanded Security Engagements," Africa Center for Strategic Studies, (June 10, 2025), https://africacenter.org/spotlight/china-influence-africa-security-engagements/

[40] DefenceWeb, "Chinese UAVs Finding a Large Market in Africa," Web Article, (January 8, 2025), https://www.defenceweb.co.za/aerospace/aerospace-aerospace/chinese-uavs-finding-a-large-market-in-africa/

China is the world's largest exporter of these systems, having sold 282 combat drones to 17 countries since 2010, while the U.S. sold only 12 combat UAVs.[41] Algeria, Democratic Republic of Congo (DRC), Ethiopia, Egypt, Kenya, Morocco, Nigeria, and Rwanda are on a growing list of African customers of Chinese UAVs. In August 2024, Uganda partnered with China North Industries Corporation (NORINCO) to build a workshop in the country to co-produce UAVs under Chinese license.[42]

China's military and security engagements are complementary to its economic, financial, commercial ties, and not its primary instrument of strategic influence, though. China for the time being remains averse to a large and costly military footprint notwithstanding the militarization of aspects of its Africa policy. Accordingly, the PLA does not appear to be fixated on outpacing the large-scale multinational exercises conducted by U.S. and other Western powers or matching their extensive network of bases and contingency locations. Instead, China has focused on entrenching itself as a dominant and indispensable power in Africa's industrialization, trade and export infrastructure. "Diversifying our external partnerships does not mean letting go of China or making binary choices" notes a retired Chairperson of the African Union (AU) Commission. "China is the top trade partner for all but two African countries, meaning our export trade volumes are driven in large part by our relations with China. This will become even more important as we make progress in greater market access and value addition.

When it comes to military competitiveness, China appears to have opted for activities where it can get maximum value with limited effort. PME is often cited by Chinese military experts as an "inexpensive" instrument of strategic influence. Some Chinese analysts describe this as "shi ban gong bei" (事倍功半) which translates to "achieving twice the result with half the effort." In the area of basing, China, for now, has opted for a light footprint and dual-use facilities that can support commercial, civilian, and military operations. It remains to be seen to whether China will abandon *shi ban gong bei* for heavier military engagement after completing its military modernization in 2049.

Case Studies in Chinese Security and Military Cooperation

This section discusses China's tailored approach to building security and military cooperation using the case studies of Algeria and Kenya. These countries offer insight into how China cultivates countries with whom it shares deep historical ties and those that were traditionally pro-West.

Algeria

Historical Ties

China trained Algeria's ruling National Liberation Front (FNL) from its inception in 1954 in its war of independence against France, putting it in the same league as other liberation movements that trained with the PLA from the outset. "The Chinese know what it means to be colonized. Their commitment came from their own experience," said Retired Algerian Colonel, Drid Ahmed Lakhdar during a memorial visit

[41] DefenceWeb, "Chinese UAVs Finding a Large Market in Africa,"

[42] Gary Mortimer, "Buyer to Builder: Uganda's Defence Industry Takes Off China Partnership Soars with UAV Workshop," SUAS News, (April 2024), https://www.suasnews.com/2024/04/buyer-to-builder-ugandas-defence-industry-takes-off-china-partnership-soars-with-uav-workshop/

to China by Algerian war veterans in July 2025.[43] As independence neared, China prepared Algeria's future officers in multiple batches, each lasting two years.

Algeria's future airmen were provided with an entire Chinese airbase for such training.[44] "That's where the foundation of Algeria's air force was laid," recalls Lieutenant Colonel Boudaoud Lounes.[45] Algeria has this in common with the Tanzania Peoples Defense Force (TPDF) which was developed by the PLA from its foundational stages.

Education, Training, Exchanges, and Institution Building

500 Algerian officers attend PME annually in Chinese officer academic institutions. Many of these schools have special relationships with Algeria, like the PLA Army Command College, Nanjing.[46] The two countries also have robust defense exchanges through their Comprehensive Strategic Partnership, the first in the Sino-Arab world and the Forum for China Africa Cooperation (FOCAC) mechanism. Key cooperation priorities are set forth in the Algeria China Five Year Plan (FYP), modelled after China's own FYPs.

Chinese firms are also heavily involved in Algeria's indigenous defense industries as is the case in at least 30 other African countries. A Presidential Decree in 2023 established a Technical System Development Establishment which launched a joint venture with China to co-produce heavy Chinese weaponry under license including the CS/LM5, CSLM12 multi-barrel rotary machine guns, LG5/QLU-11 automatic grenade launchers, and Chinese Type 056 corvettes.[47]

Military Sales

Between 2008-12 and 2013-17, Algeria's Chinese weapons imports grew 46-fold, while Russia's decreased by 35 percent.[48] Remove Algeria and Chinese weapons sales to Africa decrease by 12 percent over both periods.[49] While the preponderance of Algeria's advanced weaponry has been sourced from Russia for decades, Chinese firms have made inroads since 2022 as Russian exports struggle to retain market share due to sanctions over its invasion of Ukraine.

Some heavy Chinese armaments in Algeria's inventory include self-propelled mortars and howitzers, multiple rocket launchers, and towed guns.[50] Notably between 2014 and 2018, the bulk of China's global shipments of advanced weaponry—roughly 64 percent—went to three countries: Algeria, Bangladesh,

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[43] Xinhua, "Feature: Friendship Across"

[44] Xinhua, "Feature: Friendship Across"

[45] Xinhua, "Feature: Friendship Across"

[46] Zoubir, Y.H. (2023) Algeria and China: Shifts in political and military relations. *Global Policy*, 14(Suppl. 1), 58–68. Available from: **https://doi.org/10.1111/1758-5899.13115**

[47] NORINCO, "The 40th Anniversary Event of China-Algeria Military Industry and Trade Cooperation Held Successfully" Press Release, January 2, 2024, http://en.norinco.norincogroup.com.cn/art/2024/1/2/art_6488_469018.html

[48] Nan Tian, "China's Arms Trade: A Rival for Global Influence?," Interpreter (website), September 17, 2018, https://www.lowyinstitute.org/the-interpreter/chinas-arms-trade-rival-global-influence.

[49] Nan Tian, "China's Arms Trade"

[50] Martin Guy, "Algerian Navy Takes Delivery"

and Pakistan.[51] In 2024, China became the sole supplier of Algeria's main battle tanks after Russia failed to meet the country's orders for over two years.

Internal Security

Algeria and China have a long-lasting police, law enforcement, and public security partnership under their FYPs for 2014-2019 and 2022-2026, and lately under the GSI. Over 300 Algerian officials, including from the internal affairs ministries, received training from the China National Academy of Government under the 2014-2019 FYP.[52] In February 2025, these partnerships were extended to Special Operations Command of the Algerian National Police which will work with their Chinese counterparts on counterterrorism, tactical interventions, and law enforcement.[53]

Kenya

Historical Ties

China and Kenya don't share the same heritage that China has with countries founded by former national liberation movements like Algeria. Kenya/China relations remained turbulent and were even suspended at some point. This changed in the 1990s when the then Kenyan President, Daniel Arap Moi, adopted a "look east" policy as relations with traditional Western partners became strained. He believed they sought to topple him during the clamor for multi-party politics.[54]

The then ruling Kenya African National Union (KANU) launched extensive exchanges with the CCP to build solidarity with Kenya and learn from its governmental methods of control, but not so much its political ideology. [55]

Once KANU/CCP ties were strengthened and regularized, Kenya and China developed military exchanges at the highest level, held alternately in Nairobi and Beijing from the early to late 1990s. This paved the way for Chinese military sales to Kenya. Some of the early procurements included six 17-seater Y-12 aircraft manufactured by Harbin Aircraft Manufacturing Corporation. [56]By 1999, Kenyan officers started training in Chinese PME institutions for the first time.

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[51] Raska Michael and Bitzinger, Richard, "Strategic Contours of China's Arms Transfers," Strategic Studies Quarterly 14, no. 1 (Spring 2020)

[52] Paul Nantulya, "China Escalates Its Political Party Training in Africa," Africa Center for Strategic Studies, July 29, 2024, https://africacenter.org/spotlight/china-escalates-its-political-party-training-in-africa/

[53] Hana Saada, "Chinese Police Delegation Visits Algeria's Elite Special Operations Command," Dzair Tube Media Group, (June 2, 2025), https://www.dzair-tube.dz/en/chinese-police-delegation-visits-algerias-elite-special-operations-command/

[54] Ministry of Foreign Affairs, "Bilateral Relations between China and Kenya," Embassy of the PRC in the Republic of Kenya (website), accessed on April 2, 2021, http://ke.china-embassy.org/eng/sbgx/t169682.htm.

[55] Ministry of Foreign Affairs, "Bilateral Relations:

[56] Nantulya, "Only with Deep Roots Can a Tree Yield Rich Fruit"

China invested heavily in building party-to-party ties with Kenya to build political trust before moving on to military-to-military ties and eventually military and security cooperation. China's military and security cooperation with countries like Botswana, Cote' D'ivoire, Senegal, Liberia, and Malawi which like Kenya were traditionally closer to the West or politically neutral developed in strikingly similar ways. All Moi's successors have invested in sustaining strong economic, political, and security ties with China.

Professional Military Education, Training, Exchanges, and Institution Building

Kenya typically sends 60-70 officers annually for training in China, roughly the same numbers Nigeria sends. Kenyan officers mostly train at the strategic level, namely the PLA National Defense University (NDU) and its associated colleges.[57] Kenya and China also have regular contacts at the defense minister, defense chiefs, and service chiefs' levels. Kenya and China upgraded their relations to a "Strategic Comprehensive Cooperative Partnership" in 2025, the highest level of relations China can have with a foreign country. The Kenya China Defense Framework meets regularly to review defense cooperation in three main areas: education and training, joint exercises, and technology transfer. As part of this partnership, Chinese firms participate in the Kenya Ordnance Factories Corporation (KOFC), the country's defense industry arm. In 2021 NORINCO won a $24 million tender to supply bullet manufacturing materials to KOFC. [58]

Military Sales

Between 2000 and 2018, more than 50 percent of Kenya's weaponry was Chinese.[59] Kenya's more recent Chinese procurements include Z-9 combat helicopters from the China National Aero-Technology Import and Export Corporation (CATIC) in 2024, an assortment of military vehicles and engineering equipment in 2022, and an assortment of battle tanks, armored personnel carriers, and spare parts in 2016.[60] A groundbreaking 2020 field study on African defense procurement decisions found that cost, financial and aid incentives, and low end-user conditionalities overrode all other considerations in driving Kenyan purchases from China.[61]

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[57] Nantulya, "Only with Deep Roots Can a Tree Yield Rich Fruit"

[58] Muyela Roberto and Dennis Lubanga, "Security Firms Protest KSh 3.1 Billion Tender to Supply Bullet Manufacturing Materials," Tuko, (August 14, 2021), https://www.tuko.co.ke/422468-security-firms-protest-ksh-31-billion-tender-supply-bullet-manufacturing-materials.html

[59] Hendrix Cullen, "Arms and Influence? Chinese Arms Transfers to Africa in Context," Realtime Economic Issues Watch (blog), July 15, 2020, https://www.piie.com/blogs/realtime-economic-issues-watch/arms-and-influence-chinese-arms-transfers -africa-context.

[60] Ministry of Defence of the Republic of Kenya, "Handover of Z9 Helicopter to Kenya Army Corps of Aviation," Press Statement, October 20, 2024, https://www.mod.go.ke/news/handover-of-z9-helicopter-to-kenya-army-corps-of-aviation/ See also: Business Daily, "Kenya Boosts China Ties with Sh7.9bn Arms Purchase Deal," February 14, 2016, https://www.businessdailyafrica.com/bd/economy/kenya-boosts-china-ties-with-sh7-9bn-arms-purchase-deal-2108412

[61] Elijah Munyi, "Challenging Pax Americana: The Commercial Imperative in Chinese Arms Exports to Africa - A Case Study of Uganda and Kenya," China Africa Research Initiative, (September 2020) No. 41, https://saiia.org.za/wp-content/uploads/2020/09/CARI_WP41_MunyiChineseArmsinAfricaUgandaandKenya.pdf

Interestingly, 77 percent of Kenyan procurement experts did not perceive the growing share of Chinese-sourced weapons as hurting U.S. military interests even though they agreed that the preponderance of arms by any given supplier increases its power over the customer.

Internal Security

Kenya has procured large quantities of NORINCO-supplied police armored personnel carriers, riot control equipment, radio communications, and surveillance technologies. Major police, public security, and law enforcement-related procurements occurred in 2016, 2017, 2018, 2020, and 2023.

The two countries also cooperate on law enforcement, including extradition and mutual assistance on criminal matters. In 2016, a joint Kenyan and Chinese police operation that deported 80 Taiwanese and Mainland Chinese from Nairobi to China where they received heavy sentences for alleged telecoms fraud. China also worked with Kenya to train and equip an elite Railway Protection Force to protect the Chinese-built Mombasa-Nairobi-Naivasha Standard Guage Railway (SGR).[62]

Kenya also chose Chinese tech firm, *Huawei*, to build its public security surveillance system, consisting of thousands of high-definition cameras linking several hundred police stations and 7,600 officers, nearly 10 percent of the entire police force, to a single command center. In July 2021, China and Kenya launched a program to train 400 Kenyan security officers annually in China to include the Presidential Guard, Directorate of Criminal Investigation, and the elite counterterrorism General Service Unit.[63]

Chinese Professional Military Education (PME)

African officers regard Western and U.S. military education as more prestigious, rigorous, and robust in terms of quality, accreditation, and long-term associations. However, they also note that the scope and scale of China's offer, particularly longer-duration PME remains unmatched (the U.S. still conducts more shorter-duration PME and training than does China)[64] China also offers a complete package, i.e., paying for air and ground transportation, medical cover, accompanying family members on longer courses, and stipends. "Our culture is to send our very best and brightest to the Western academy, but the Chinese are coming in with a bigger offer and that's where we end up sending our people," notes a training officer from the Economic Community of West African States (ECOWAS).[65]

China offers short and medium courses, and longer graduate-level PME at its war colleges. The quotas come from FOCAC, bilateral, and specialized allocations. The current allocation for the 2024-2027 FOCAC program is 99,500 slots of which 6,500 were allocated to early, mid-career, and senior military officers and 1,000 to law enforcement.[66]

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[62] Nantulya, "China's Policing Models Make Inroads in Africa"

[63] Nantulya Paul, "China Widening Its Influence Through Expanded Security Engagements"

[64] Paul Nantulya, "Chinese Professional Military Education for Africa: Key Influence and Strategy," United States Institute of Peace, Special Report, (July 5, 2023), https://www.usip.org/publications/2023/07/chinese-professional-military-education-africa-key-influence-and-strategy

[65] Nantulya, "Chinese Professional Military Education for Africa: Key Influence and Strategy,"

[66] Paul Nantulya, "What to Expect from Africa-China Relations in 2025," Africa Center for Strategic Studies, January 7, 2025, https://africacenter.org/spotlight/africa-china-relations-2025/

Bilateral cooperation agreements often set targets for military training. Examples include the South Africa China Defense Committee, which meets every 2-4 years, the Nigeria China Intergovernmental Committee Mechanism, which meets at similar intervals, the Kenya China Defense Framework, and the Algeria China Five Year Plan, among others.

Specialized allocations come from defense firms like NORINCO, which include training quotas in their military sales packages. Chinese State-Owned Enterprises (SOEs) also fund security sector training as part of their larger project portfolios. China Roads and Bridges Corporation (CRBC) for instance provided funding and technical expertise to train the Kenya Railway Protection Force in Chinese police academies. [67]This went together with a program to train Kenyan railway engineers through a partnership with Beijing Jiaotong University where China's premier institute for training railway engineers from Africa and other parts of the Global South is located.[68]

These three sets of allocations provide a large pool of slots that can be adjusted, increased, and distributed as needed, giving China significant latitude and flexibility that other countries could find challenging to match. There is still an open question as to the point at which China's ability to provide and finance training slots at scale begins to outcompete the qualitative value offered by Western countries.

Institutional Layout

Over half of China's 34 officer academic institutions receive African officers, which was not the case prior to FOCAC.[69] The PLA NDU alone receives between 300-400 African officers annually. African officers also attend the command colleges of the PLA's branches; specialized institutions, such as the PLA's medical and engineering universities, the peacekeeping training schools of the PLA and Peoples Armed Police (PAP). Between 2018 and 2021, 500 African officers attended the PLA Naval Medical University over and above the 2,000 military education allocation. Over the same period, 2000 African police and law enforcement officers trained in PAP academies, including degree-granting ones.[70]

In some years, two-thirds of total enrollment at the PLA's Army Command College, Nanjing, is African.[71] This school has graduated 10 African chiefs of defense, and eight defense ministers, and six African presidents. Some schools have special relationships with individual countries like Dalian Naval Academy, which has trained Tanzanian sailors since the inception of the Tanzania Naval Command in 1971.[72] The PLA Airforce Command College has a similar relationship with the Algerian Air Force, which it helped build from its foundations in the late 1950s.

[67] Nantulya, "China's Growing Police and Law Enforcement Cooperation in Africa,"

[68] Nantulya, "China's Growing Police and Law Enforcement Cooperation in Africa,"

[69] Nantulya, "Chinese Professional Military Education for Africa: Key Influence and Strategy,"

[70] Paul Nantulya, "China's "Military Political Work" and Professional Military Education in Africa," Africa Center for Strategic Studies, (October 30, 2023), https://africacenter.org/spotlight/china-pla-military-political-work-pme-africa/

[71] Nantulya, "Chinese Professional Military Education for Africa: Key Influence and Strategy,"

[72] Nantulya, "Chinese Professional Military Education for Africa: Key Influence and Strategy,"

PLA Army Command College, Nanjing, has deep historical ties to Southern African countries, particularly Angola, Mozambique, Namibia, South Africa, Tanzania, Zambia, and Zimbabwe, which are part of a regional grouping called the "Former Liberation Movements of Southern Africa" (FLMSA).[73]

The PLA's NDU received the very first African fighters that arrived in China in the early 1950s. Back then, it operated as three institutions: the 4th Department of Higher Military College, Peking, 4th Department of Military Intelligence, Nanjing, and the Foreign Training Department, Beijing.[74] In 2017, they were merged into the International College of Defense Studies (ICDS) of the PLA NDU. In some years, close to half of its enrollees are African.[75]

Curricula

The Chinese PME curricula cover military science and doctrine, deep dives into China's political and economic system, political work and political thought, and military occupational specialties.[76] International studies are taught at the higher level and covers Chinese and general international relations, including the Belt and Road Initiative, Global Development Initiative (GDI) and GSI.[77]

Tailored programs are also a staple of the Chinese training system. A Burundian graduate of both the U.S. National War College and PLA Army Command College, Nanjing notes that during his command and staff training in China, a cohort of 60-70 Congolese officers attended an extended program tailored to their country's needs.[78] Launched in 2015, Ethiopian officers on track to become generals attended a graduate-level "Ethiopia Senior Leaders Course" at the PLA NDU, though the program may have been interrupted by COVID.[79]

In 2023, Uganda and China established a specialized training program to teach the Uganda Peoples Defense Force (UPDF) Engineering Brigade to construct an SGR. Several batches of Zimbabwean armor officers have received specialized training in armored warfare at the PLA Army Academy of Armored Forces and in Zimbabwe through Chinese security assistance programs.

Party/Army Model

The PLA's foundational concept of party supremacy over the armed forces filters through all aspects of the Chinese PME experience. [80]African and foreign students are exposed to it through the course content as well as the directing and teaching staff who come from various Party and Government institutions, the CCP's Central Military Commission which runs the PLA, and Party-affiliated think tanks.

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[73] Paul Nantulya, "China's First Political School in Africa," Africa Center for Strategic Studies, November 7, 2023, https://africacenter.org/spotlight/china-first-political-school-africa/

[74] Nantulya, "Chinese Professional Military Education for Africa: Key Influence and Strategy,"

[75] Nantulya, "Chinese Professional Military Education for Africa: Key Influence and Strategy," See also: Kimeng Hilton Ndukong, "60 African Officers Pass Out from Chinese Defence University," People's Daily, July 13, 2017, http://en.people .cn/n3/2017/0713/c90000-9241244.html.

[76] Nantulya, "Chinese Professional Military Education for Africa: Key Influence and Strategy,"

[77] Author's research, consisting of a database of top African commanders and their alma maters

[78] Interview with Burundian Colonel, May, 2, 2025.

[79] Nantulya, "Chinese Professional Military Education for Africa: Key Influence and Strategy,"

[80] Nantulya, "China's "Military Political Work" and Professional Military Education in Africa,"

Secondly, political commissars enjoy co-equal rank and authority with commandants, meaning students are exposed to both the political and military side of things.[81] Every Chinese PME institution also has a Political Work Department in its formal structure.

A question that is often raised is the degree of uptake of China's "party/army" norms and practices. The answer is complex and nuanced. Countries like Angola, Burundi, Eritrea, Mozambique, Uganda, South Sudan, Zimbabwe and others, which either retain political commissar systems in their military structure, or where the ruling party interfaces closely with the military and vice versa will be more attuned to adapting China's "party/army" model for their own purposes.

So too are countries like Equatorial Guinea, Cameroon, Gabon, Guinea Bissau, and Togo that do not have such structures but remain preoccupied with regime survival and bringing their militaries under tighter control as a result. Countries like Botswana, Ghana, Kenya, Liberia, Senegal, and South Africa with strong, highly institutionalized, and enduring cultures of a non-partisan military have demonstrated continued respect for this principle even as they step up their training and education in China.

Policy Implications and Options

- The intensity of Chinese engagement is blunting America's competitive edge across several areas, including graduate-level PME. "China matters to us," says a senior AU Commission official. "We have a shared perspective on security and the importance of African stability, and 52 out of 54 African countries count China as their number one trade partner, which was not the case in 2000. This is not a partnership to be taken lightly."
- A well-thought-out U.S. response starts with an objective, evidence-based analysis of the comprehensive nature of Chinese engagement. FOCAC has regularized, routinized, and institutionalized China/Africa ties on multiple fronts. The practice of every Chinese foreign minister visiting no less than 45 African countries over their 10-year tenure and every Chinese president making no less than two visits to the continent conveys a strong message that Africa matters to China. So does FOCAC which operates on a three-year planning cycle across 12 sectors, a structure China replicated in other global regions.
- The U.S. need not match China dollar for dollar. Instead, it should leverage its greatest comparative advantages like public-private partnership, communication, technological innovation, alumni engagement, and leadership development. The U.S. has also traditionally been viewed by many African civilian and military professionals as a destination for high quality education and capacity building—something it can leverage as part of a competitive strategy.
- Many African officers suggest that a dramatic increase in African PME slots is an obvious quick win for the U.S. given the strong demand. However, cost and competing priorities are often cited as constraining factors.
- The U.S. might overcome this by exploring a new investment vehicle where several likeminded donors pledge funds and PME slots to a common mechanism that matches U.S. PME contributions every 2-3 years. African countries would make their contributions as co-investors and compete for spots in PME institutions in the donor countries. To be sure, partner priorities

[81] Paul Nantulya, "China's "Military Political Work" and Professional Military Education in Africa,"

may not always align. If this can be overcome, however, this model of engagement would help share costs, scale up PME opportunities, and promote genuine partnership.

- African countries have also traditionally welcomed the U.S. practice of sending American officers to attend their PME institutions to forge closer partnership, gain a deeper understanding of African PME needs, and factor this into U.S. security assistance. This might be scaled up by working with African countries to select a regionally representative pool of African PME institutions that can receive U.S. military exchange students on a more regular basis. China traditionally does not send its officers to study in African PME institutions.
- PME is a major area of growth in Africa, with over 118 military colleges as of February 2022 according to the Africa Center for Strategic Studies (ACSS). By making smart and cost-effective investments, the U.S. can respond to this demand competitively and sustainably, and in ways that add value to the American military.

Questions for Consideration

Many questions should be considered in discussing how the U.S. can be more competitive vis-à-vis China. These are presented below:

- At what point does the quantity China offers override the quality offered by the U.S. in terms of PME?
- To what extent does China's use of PME shape the perspectives and loyalties of Africa's future defense leaders, and how might this influence African alignment in future crises?
- How can the U.S. and allies scale PME access in cost-effective ways without replicating China's regime-entrenching model?
- What are the risks of China's growing law enforcement and surveillance partnerships under the GSI for governance, human rights, and U.S. interests in democratic resilience?
- How should U.S. policy respond to the deep integration of Chinese defense industries in Africa, without forcing partners into binary choices?
- Given China's ability to frame itself as a regime security guarantor, how can the U.S. remain a trusted partner while avoiding association with authoritarian consolidation?
- Does China's focus on dual-use infrastructure and limited overseas basing represent a long-term trajectory toward heavier military presence, and what indicators should U.S. analysts monitor?
- How can U.S. policymakers better integrate Africa into broader strategic competition frameworks, ensuring that responses to China also serve African priorities like peacekeeping, counterterrorism, and economic development?

Background Research - Paper 7

Gates Forum IV

From Guns to Governance: The Evolution and Future of U.S. Security Assistance in Latin America - Colombia Case Study

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Executive Summary
Secretary of Defense Pete Hegseth recently said, "ultimately a strong, resolute and capable network of allies and partners is our key strategic advantage… but it's up to all of us to ensure that we live up to that potential by investing." Focusing on the strengthening of defense institutions – the conglomeration of the civilian leadership, oversight bodies, and armed forces that plan, resource, govern, and employ a nations military power – is a critical tool to increase burden sharing and to help prevent states from descending into instability or chaos.

Security cooperation has evolved from its Cold War origins, from supporting the U.S. containment strategy, to a post–Cold War focus in Latin America primarily centered on counternarcotics, and then to a post-9/11 emphasis on both counternarcotics and counterterrorism, particularly in the case of Colombia. Over this same period, the tool of Institutional Capacity Building (ICB) has evolved from an afterthought into a key pillar of security cooperation, especially since 2017. ICB is now paramount in shaping sustainable outcomes that go beyond short-term tactical gains. This paper asks what is the legacy of U.S. security assistance in Latin America, and how can ICB shape future efforts? Using Colombia as a case study, it explores the evolution of U.S. security assistance and examines how institutional reform can serve U.S. interests more strategically in the years to come.

This paper finds that the U.S. must increase its ICB efforts worldwide, as it is an increasingly vital tool in addressing great power competition. It advises policymakers and practitioners that for ICB to succeed, there must be strategic alignment between both countries. It recommends allowing sufficient time to secure partner buy-in and emphasizes the importance of understanding a partner nation's agents of change and their motivations. It also recommends that ICB programs be well-targeted, with careful attention paid to prioritizing and sequencing efforts to maximize impact. Lastly, it suggests the U.S. encourage partner nations to pursue additional institutional reform opportunities, such as those offered by NATO or other aligned implementers, that support and advance shared strategic objectives.

Introduction
As the book "Why Nations Fail" suggests, a state needs a monopoly on violence to ensure order and enforce laws, but this monopoly must be exercised through institutions that are accountable and governed by the rule of law.[1] Max Weber emphasized that this monopoly, when legitimate, is essential to protect sovereignty from both state and non-state actors seeking control.[2] This underpins the imperative for strong defense institutions, a priority that has become even more relevant as the United States increasingly encourages other nations – including those in Latin America – to invest more heavily in their defense. As the Secretary of Defense Pete Hegseth recently said, "ultimately a strong, resolute and capable network of allies and partners is our key strategic advantage… but it's up to all of us to ensure that we live up to that potential by investing." Increased investments in military capabilities require strengthened institutional capacity to properly manage those resources, lest they become corrupt or fall into misuse. Therefore, focusing on the strengthening of defense institutions is a critical tool to increase burden sharing and help prevent states from descending into instability or chaos.

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[1] Daron Acemoglu and James A. Robinson, *Why Nations Fail: The Origins of Power, Prosperity, and Poverty*, Reprint edition (Crown Currency, 2013).

[2] Max Weber, *Politics As a Vocation* (Hassell Street Press, 1864), https://www.balliol.ox.ac.uk/sites/default/files/politics_as_a_vocation_extract.pdf.

While U.S. engagement with defense institutions worldwide – particularly in Latin America – spans several decades, only recently has there been a more explicit focus on institutional strengthening. During the Cold War, the United States supported military dictatorships in countries such as Chile, Argentina, and Guatemala, many of which were responsible for gross human rights violations. However, since the end of the Cold War, the U.S., primarily through U.S. Southern Command (SOUTHCOM), has emphasized becoming a partner of choice in the region, focusing largely on building military capabilities to counter the flow of narcotics northward to the United States. This evolution of security assistance in the region leads to the research question, **what is the legacy of U.S. security assistance in Latin America, and how can ICB shape future efforts?** To address this question, this paper will begin by examining the overall evolution of U.S. security cooperation, with particular attention to the progression from building military capability to strengthening institutional capacity. It will then narrow in on a case study of Colombia, analyzing the country's trajectory in detail to better understand the motivations behind these shifts. This will include covering some of its successes and lessons learned in institutional reform. Next, the paper will explore why institutional capacity building has emerged as a key pillar of security cooperation, drawing out lessons that can be applied across the hemisphere. Finally, it will examine the drivers behind these changes and offer recommendations to guide future efforts.

To answer the research question, I draw from multiple sources, including U.S. government documents and Congressional Research Service reports. I also incorporate academic literature as well as interviews and speeches by U.S. and Colombian policymakers. Finally, as the former Colombia Country Director for the Office of the Secretary of Defense for Policy (2017–2021), where I was directly involved in the implementation of U.S. institutional capacity building programs, I draw on personal experience to contextualize the implementation challenges discussed below.

From Military Capability to Institutional Capacity

The U.S. began providing security assistance with the establishment of the Foreign Assistance Act of 1961, passed by Congress. This, along with the Arms Export Control Act of 1976, provided the foundational authorities for U.S. security assistance.[3] While these laws gave authority to the Department of State (DoS), the Department of Defense (DoD) played an important role in helping DoS execute these programs under the broader imperative of containing communism. By the 1980s, however, Congress granted DoD its own authorities to conduct counternarcotics and humanitarian assistance efforts under the National Defense Authorization Act (NDAA). With the Cold War drawing to a close, these authorities gradually expanded to include nonproliferation and counterterrorism programs as well. After 9/11, Congress further broadened DoD's role by authorizing it under the NDAA to "engage in security cooperation programs." Today, DoD spends approximately $10 billion on security cooperation programs worldwide, mostly focused on train-and-equip programs.[4]

The relatively new concept of Institutional Capacity Building (ICB), a subset of security cooperation, evolved gradually after the end of the Cold War. Four distinct but interrelated developments shifted the focus from primarily supporting military operations to also strengthening institutional development.[5]

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[3] Lina Rosen and Susan Epstein, "U.S. Security Assistance and Security Cooperation Programs: Overview of Funding Trends," Congressional Research Service, February 1, 2018, https://www.congress.gov/crs-product/R45091.

[4] Rosen and Epstein, "U.S. Security Assistance and Security Cooperation Programs."

[5] Alexandra Kerr, "Defense Institution Building in the U.S. Context," *Connections* 17, no. 3 (2018): 23–38.

First, after decades of building the military capacity of allies and partners during the Cold War, there was a strategic pivot from containing communism to promoting democracy and civilian control of the military. Second, the emerging concept of Security Sector Reform emphasized that broader state-building efforts required concurrent reforms in defense institutions. Third, the United States supported a new initiative in the 1990's — NATO's Partnership for Peace program — which assisted former Warsaw Pact countries in reforming their Soviet-era defense sectors, with an emphasis on transparency, interoperability, and democratic oversight. Fourth, post-9/11 state-building efforts in Iraq and Afghanistan demonstrated that significant investments in traditional train-and-equip programs had not translated into institutional or sustainable partner capacity. This revealed the need for a new approach—one focused on building durable, long-term defense institutions.

The evolution within the Department of Defense was gradual, and prior to 2008, most programs focused on defense institutional reform abroad were scattered and lacked structure. However, beginning in 2008, a more formalized understanding of defense institution building emerged, starting with the Global Employment of the Force (GEF), which recognized the importance of strengthening partner nation security sectors through long-term institutional support.[6] By the 2010 Quadrennial Defense Review, DoD acknowledged that "in order to ensure that enhancements developed among security forces are sustained, the support institutions in partner nations must also function effectively."[7] In 2016, the Department of Defense issued a directive defining defense institution building efforts as "activities that empower partner nation defense institutions to establish or reorient their policies and structure to make their defense sector more transparent, accountable, effective, affordable, and responsive to civilian control."[8]

By 2017, Defense Institution Building (DIB) was renamed Institutional Capacity Building (ICB) for two main reasons. First, there were concerns that the term *DIB* "evokes a sense of erecting institutions from scratch—which is not the case in the vast majority of countries—rather than helping partners strengthen and reform the governance and management of particular elements of their existing institutional systems."[9] Second, within the defense enterprise, *DIB* was also commonly understood to refer to the defense industrial base, creating potential confusion.

The U.S. Congress formally recognized the importance of ICB in its Joint Explanatory Statement accompanying the Fiscal Year (FY) 2017 NDAA. It noted that DoD activities over the preceding 15 years had focused primarily on the tactical and operational capabilities of foreign militaries, while paying "insufficient attention" to building institutional capacity. Congress emphasized that the Department should "increase emphasis on strengthening the defense institutions of friendly nations." As a result, the FY2017 NDAA included a requirement for the DoD to incorporate ICB into all security cooperation activities conducted with partner nations.

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[6] Kerr, "Defense Institution Building in the U.S. Context."

[7] "Quadrennial Defense Review Report," Department of Defense, February 2010, https://history.defense.gov/Portals/70/Documents/quadrennial/QDR2010.pdf.

[8] "DOD DIRECTIVE 5205.82 Defense Institution Building," Office of the Under Secretary of Defense for Policy, January 27, 2016.

[9] Kerr, "Defense Institution Building in the U.S. Context."

Within the FY 2017 NDAA, Congress included specific authorities to conduct ICB, namely §332a, which provides for resident institutional advisors embedded in partner nations' defense ministries, and §332b, which authorizes long-term, sustained subject matter expertise through intermittent engagements. Most of these activities are implemented through the Ministry of Defense Advisor (MODA) Program, the Institute for Security Governance (ISG), and the Defense Institute of International Legal Studies (DIILS), all of which fall under the Defense Security Cooperation University.

Additional authorities such as §342 empowered the five DoD Regional Centers for Security Studies – such as the George C. Marshall Center (focused on Europe) and the William J. Perry Center (focused on Latin America) – to provide resident and mobile training for knowledge and skills transfer. Other relevant authorities included §341, which governs the State Partnership Program, allowing U.S. National Guard units aligned with foreign militaries to help develop institutional capacity.

While several of the authorities listed above fall under Title 10, ICB efforts are also funded through other mechanisms under Title 22, such as the International Military Education and Training (IMET) program and Foreign Military Sales (FMS) cases. These mechanisms likewise contribute to developing institutional capabilities, thereby optimizing partner nations' capacity to absorb and sustain these capabilities over time.

The formalization of ICB in 2017 highlighted a broader transition in U.S. security cooperation, from a narrow focus on tactical train-and-equip programs toward a more comprehensive approach that includes institutional capacity building as a foundational element of long-term partner development. Institutional support is now increasingly seen as essential to ensuring improved capabilities are sustainable and that partner nations can manage their defense sectors effectively, transparently, and under civilian control.

Strengthened defense institutions also reduce vulnerability to malign and authoritarian influence, as well as to transnational threats—many of which are tied to great power competition. A prominent example is illegal, unreported, and unregulated (IUU) fishing, which is largely carried out by China's long-range fishing fleet.[10] Addressing such challenges requires not only maritime capabilities but stronger institutions able to plan and coordinate effectively across the interagency, ensuring resources and intelligence are integrated to counter complex, multi-jurisdictional threats. This increased institutional capacity not only enables partners to manage improved military capabilities and provide for their own defense but also strengthens their ability to share security burdens. In turn, these partners can contribute alongside U.S. and allied countries in advancing collective objectives in an era of strategic competition. This shift has also shaped how security cooperation is approached regionally, including in Latin America, where traditional assistance models have gradually been supplemented with efforts to strengthen defense governance and institutional resilience.

Evolution of Security Assistance in Colombia

During the Cold War, the United States provided security assistance to Colombia with the primary goal of preventing the spread of communism. Much of this support began in 1962 under a Kennedy-era initiative known as the Alliance for Progress which provided support to Colombia's Plan Lazo, which intended to use the military to provide economic and social development programs in addition to

[10] JoEllen Arons, *China's Quest for Power in the Arctic:*, 2025, https://tedstevensarcticcenter.org/wp-content/uploads/2025/03/JAS_Vol-2_Gosnell_Arons_Chinas-Quest-for-Power-in-the-Arctic.pdf.

improving security.[11] The U.S. provided economic backing as well counter-guerrilla training and support. [12]

As the Cold War ended, the U.S. faced shifting political priorities. Although Colombia continued to face home-grown communist leaning ideological insurgent groups, Congress grew increasingly reluctant to fund programs framed around combating such groups, particularly after the billions spent addressing similar challenges in Central America. Instead, there was greater political will to support programs focused on counternarcotics, which provided a more politically viable justification for continued engagement in the region. For example, in 1989 President Bush started a $2 billion effort in the Andean Ridge to address the growing narcotics industry.[13] Despite these efforts, violence continued to spiral in Colombia.

By 1998, many believed Colombia was on the verge of becoming a failed state. The country faced extreme violence, with homicide rates reaching 84 per 100,000 people, the highest in the world, and accounted for approximately half of global kidnappings.[14] By this point, Colombia's internal conflict involved powerful drug cartels and a range of armed groups, including the terrorist organizations Revolutionary Armed Forces of Colombia (FARC) and the National Liberation Army (ELN), as well as paramilitary groups like the United Self-Defense Forces of Colombia (AUC), all operating beyond the control of the government. As violence spiraled, a new strategy to address the violence emerged, reinforced by a sizable investment from the United States amounting to over $9 billion over 10 years to help the government "reassert authority, and increase its capacity throughout the country".[15] Plan Colombia started as an initiative under Pastrana in agreement with then President Clinton. The plan was initially comprised of three main pillars: reduce narcotics flow, promote social and economic justice, and promote the rule of law.

The general concept behind the counternarcotics pillar was strengthening Colombia's security institutions to boost the country's ability to confront drug cartels. This effort included improving Colombia's tactical and operational intelligence capabilities for targeting, exemplified by the development of intelligence fusion centers which were supported by U.S. intelligence assets for detection and monitoring. It also involved expanding and strengthening Colombia's special operations capabilities needed to specifically target illicit actors. Lastly, a major focus was placed on building rotary-wing air mobility capability, especially through the provision and integration of UH-60 helicopters, which enabled Colombian forces to reach remote and inaccessible areas, a critical requirement for conducting targeting operations against dispersed armed actors.

Plan Colombia initially encountered significant strategic challenges. The United States prioritized a counternarcotics approach focused on interdiction and targeting cartel leadership, while the Colombian government prioritized counterterrorism efforts against the FARC and ELN – which were responsible

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[11] Paul J. Angelo, *From Peril to Partnership: US Security Assistance and the Bid to Stabilize Colombia and Mexico* (Oxford University Press, 2024).

[12] Forrest Hylton, "Plan Colombia: The Measure of Success," *The Brown Journal of World Affairs* 17, no. 1 (2010): 99–115.

[13] "National Security Directive 18," The White House, August 21, 1989, https://bush41library.tamu.edu/files/nsd/nsd18.pdf.

[14] World Bank Data, "Intentional Homicides (per 100,000 People) - Colombia, United States, United Kingdom, Spain | Data," 2022, https://data.worldbank.org/indicator/VC.IHR.PSRC.P5?locations=CO-US-GB-ES.

[15] © Stanford University et al., "MMP: Revolutionary Armed Forces of Colombia (FARC)," accessed December 18, 2021, https://cisac.fsi.stanford.edu/mappingmilitants/profiles/revolutionary-armed-forces-colombia-farc.

for most of the violence. Consequently, there were stringent limitations on the use of U.S.-funded equipment. Colombia was required to provide detailed documentation demonstrating a clear counternarcotics nexus whenever using this equipment against guerrilla groups. As Caryn Hollis, the former Deputy Assistant Secretary of Defense for Counternarcotics and Global Threats, noted, "Are you a drug trafficker or are you and insurgent, because if you're an insurgent [we] can't use these bullets… , but it you are a drug trafficker [we] can."[16] These bureaucratic requirements often delayed operations, undermining the effectiveness of actionable intelligence.

The terrorist attacks against the United States on September 11, 2001, marked a pivotal turning point in U.S. policy in Latin America, shifting its primary focus from counternarcotics to counterterrorism, in line with the Global War on Terrorism. This shift aligned U.S. and Colombian interests more closely. In November 2003 a new legislative authority was signed into law under the NDAA for FY 2004 – §1021 authorities – allowing U.S. security assistance to directly support operations against terrorist organizations in Colombia without needing to prove a narcotics nexus. This legislative change supercharged Colombia's operational effectiveness against insurgent groups by allowing them to use U.S. provided military equipment against the major sources of national insecurity. As former U.S. Ambassador to Colombia said, "when plan Colombia started it had about a dozen working helicopters…. And when I left it had about 190 helicopters." This increase of military capability along with strategic alignment with the U.S. resulted in a drop in kidnappings from high of 3,500 a year to a couple hundred, and a decrease in homicides from over 80 per 100,000 to 25. In terms of the effects on insurgent groups, FARC numbers decreased from approximately 18,000 to a low of about 6,000, ELN numbers dropped from around 5,000 to 1,500, and the AUC entered into a peace process with the government.[17] Increases in military capability coupled with institutional support would eventually lead Colombia to its 2016 Peace Accord with the FARC.

Institutional Reform in Colombia

Despite increased capability by Colombia's military and national police, significant institutional challenges persisted. The notorious false-positives scandal revealed that some army units had killed over 2,000 civilians and then dressed the bodies in FARC uniforms to inflate insurgent body counts.[18] This was largely attributed to a perverse set of incentives in its strategy which prioritized enemy body counts as a key metric of operational success. This among other controversies challenged the legitimacy of the country's defense institutions. As Dr. David Spencer remarked, the U.S. in its security cooperation efforts had "focused on tactical training, weapons system, and training to operate those

[16] Caryn Hollis, "Interview by McCurdy, Daphne, and Nick Lopez. Institution Building as a Counterinsurgency Tool: The Case of Colombia - Modern War Institute. Podcast Audio," n.d., https://mwi.westpoint.edu/institution-building-as-a-counterinsurgency-tool-the-case-of-colombia/, https://mwi.westpoint.edu/institution-building-as-a-counterinsurgency-tool-the-case-of-colombia/.

[17] R Evan Ellis, "The Reinforcing Activities of the ELN(National Liberation Army) in Colombia and Venezuela," *Journal of the Americas*, 2021, https://www.airuniversity.af.edu/Portals/10/JOTA/Journals/Volume%203%20Issue%202/05_Ellis_eng%20%282%29.pdf?utm_source=chatgpt.com.

[18] Mariana Palau, "The False Positives Scandal: How Thousands of Innocent Colombians Were Killed so Soldiers Could Get More Holiday," World News, *The Guardian*, November 19, 2020, https://www.theguardian.com/world/2020/nov/19/colombia-false-positives-killings-general-mario-montoya-trial.

systems, the problem was we trained on tactics, but didn't really train them on strategy."[19] As former U.S. Ambassador to Colombia Kevin Whitaker noted, building "effective and resilient institutions" therefore became more important than building military capability or addressing the narcotics problem. "It became about institution building… turning the Colombian military into a more professional outfit."[20]

The U.S. found a willing and able partner to take on defense institutional reform in Colombia with then-Vice Minister of Defense Juan Carlos Pinzón.[21] Under his leadership, the U.S. Department of Defense in 2008 began providing institutional support through the Defense Institution Reform Initiative (DIRI). One of the key institutional challenges they set out to address was the limited civilian control of the military. In order to strengthen the Ministry of Defense to address this institutional challenge, reforms needed to focus on three core areas. First, the Ministry needed to develop a more professional civilian workforce. Second, it had to strengthen its capacity for strategy and planning. And third, it needed to enhance its ability to plan for and oversee the sustainment of military capabilities.

These institutional weaknesses manifested itself in the relationship between the ministry of defense and the military services when it came to planning and budgeting. Traditionally, each military service – Army, Navy, and Air Force – submitted its budget requests directly to Congress. This arrangement weakened civilian oversight by limiting the Ministry of Defense's ability to plan, coordinate, and control defense spending. As a result, it contributed to duplication of capabilities across services, inefficiencies in resource allocation, and poor alignment between military investments and national security priorities as defined by political leadership.

Building on this partnership, in 2011 Juan Carlos Pinzón – by now serving as Minister of Defense – established three new directorates following DIRI recommendations to improve and centralize planning and budgeting, with the aim of strengthening civilian control of the military. These included the Dirección de Programación de Capacidades (Capabilities Programming Directorate), the Dirección de Capital Humano (Human Capital Directorate), and the Dirección de Logística (Logistics Directorate). All three were placed under a newly created Vice Ministry of Defense for Estrategia y Planeación (Strategy and Planning). These institutional reforms directly addressed the three priority areas identified earlier: strategy and planning, resource management, and human resource management. DIRI also advised Colombia on creating a capabilities-based planning system, allowing the Ministry of Defense to align national priorities and future threats with required capabilities, force structure, and budget allocations.

By 2018, the Ministry of Defense implemented its capabilities-based planning model, which required the military services to submit their plans and budgets to the Ministry of Defense for approval. These were then forwarded to the Ministry of Finance for concurrence before being sent to Congress for final

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[19] David Spencer, "Interview with Dr. David Spencer, William J. Perry Center for Hemispheric Defense Studies, on US ICB Efforts in Colombia," June 13, 2025.

[20] Kevin Whitaker, "Interview by McCurdy, Daphne, and Nick Lopez. Institution Building as a Counterinsurgency Tool: The Case of Colombia - Modern War Institut. Podcast Audio," n.d., https://mwi.westpoint.edu/institution-building-as-a-counterinsurgency-tool-the-case-of-colombia/, https://mwi.westpoint.edu/institution-building-as-a-counterinsurgency-tool-the-case-of-colombia/.

[21] Lina M. Gonzalez et al., *Appendix B.: Interviews*, Defense Governance and Management (Institute for Defense Analyses, 2017), B-1, https://www.jstor.org/stable/resrep22782.15.

budget decisions. This process eliminated the direct budgetary link between the military branches and Congress, thereby strengthening civilian control of the military through the Ministry of Defense.

Institutional Reform with the Military

While the implementation of the capabilities-based model marked significant step forward, much of the reform at the Ministry of Defense level was not reflected within the General Command. [22] As then Vice Minister of Defense Mariana Martínez noted, although the process had empowered the Ministry in planning and budgeting, it still lacked a military interlocutor capable of providing consolidated, strategic military advice across the services. At that time, I was serving as the Colombia Country Director and was directly involved in advancing this reform. We agreed that the General Command was a natural candidate for this role.[23] However, it had not benefited from the institutional development support that the Ministry of Defense had received from DIRI. To address this gap, we at OSD-Policy, with support from SOUTCHOM, the Perry Center, and the Institute for Security Governance (ISG), sought to launch a parallel initiative. The first step was a Perry Center managed study to understand the General Command's current structure and assess how institutional support could help it effectively assume the role of providing the Ministry with informed military advice aligned with the capabilities-based planning model.

After months of negotiations with the Colombian General Command over the study's scope and future institutional support, the General Command ultimately rejected the initiative on the eve of its launch. This rejection was significant as it left the military outside the capabilities-based planning process, preventing it from reaching the same level of institutional maturity as the Ministry of Defense. According to those involved, some senior commanders perceived the effort not as an opportunity to strengthen joint planning, but as a threat by the ministry of defense into their autonomy as military commanders.[24] While the ICB intentions were well founded, those of us involved in advancing the effort had failed to understand the personal dynamics at play. In the end, this was about internal personality conflicts.[25]

The failure to implement an ICB program with the General Command had less to do with the need for reform and more to do with our collective failure to recognize the internal personality undercurrents within defense institutions. Defense institutions are not monolithic organizations, but rather complex systems with multiple layers and competing interests. While ICB solutions must be co-developed with the partner, identifying the right agents of change, those capable of building internal consensus, is essential to moving such programs forward. This process can take time and often requires careful calibration of senior leader engagements. Conversely, with the launch of the ICB program at the Ministry of Defense in 2008, a key factor in its success was the early buy-in and strategic support of the then Vice Minister of Defense, which helped facilitate the program's implementation.

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[22] Gonzalez et al., *Appendix B.*

[23] Mariana Martinez, "Interview with Former Vice Minister of Defense of Colombia about ICB," June 9, 2025.

[24] David Spencer, "Interview with Dr. David Spencer, William J. Perry Center for Hemispheric Defense Studies, on US ICB Efforts in Colombia," June 13, 2025.

[25] David Spencer, "Interview with Dr. David Spencer, William J. Perry Center for Hemispheric Defense Studies, on US ICB Efforts in Colombia," June 13, 2025.

This unfortunate turn of events nonetheless left a gap in the military services' understanding of the capabilities-based planning model and their role in informing the Ministry of Defense. In recent years, a new effort has emerged to address this gap. ISG has begun advising the individual military services on developing their own internal capabilities-based planning models to more accurately align with and inform that of the Ministry of Defense.[26]

ICB programs take time to develop and implement, and their impact does not end once a model is adopted. In this case, institutional capacity needed to be developed across multiple levels. What began in the Ministry of Defense in 2008 and was implemented in 2018 has now expanded to the military services. This next phase will likely take several years for the services to fully adopt. ICB advice doesn't simply end, it must continuously evolve. ICB should be considered a permanent activity because institutions are constantly undergoing reform, leadership changes, and process improvements. As one expert put it, "you're always having to work on reforming institutions, just look at the Europeans, they're always transforming too."[27] As Juan Carlos Pinzón recently noted, even with the successes of ICB at the Ministry of Defense, the next Presidential administration in Colombia will need to reengage in institutional strengthening as Colombia faces renewed violence.[28]

While ICB may appear to be an attractive tool to apply broadly in a priority country for U.S. interests, this case study illustrates the importance of careful prioritization and sequencing. Although U.S. support under Plan Colombia had helped the military develop robust operational capabilities, the institutional capacity of the Ministry of Defense remained underdeveloped and needed reform. Had institutional reforms started at the military level, the strengthening of the Ministry of Defense and by extension civilian control of the military might not have occurred. Alternatively, had there not been any prioritization and instead both the Ministry and the military services had developed their institutional capacity concurrently, their resulting systems would likely not have been aligned, as each service would have tailored the program to their needs and priority, not necessarily that of the Ministry of Defense. Therefore, by focusing first on building institutional capacity within the Ministry of Defense and then transitioning to the military services, ensured that the capabilities-based planning systems developed by the services aligned with those created by the Ministry.

Future Institutional Reform Opportunities

After the 2016 Peace Accord with the FARC, at OSD-Policy we worked with the Ministry of Defense to identify new opportunities for collaboration. One promising area we began exploring was the development of Colombia's defense strategic intelligence capability. One of the major successes of Plan Colombia had been the enhancement of Colombia's operational and tactical-level intelligence. This capability had effectively hampered the FARC's operations, contributing to the conditions that led to the Peace Accord. However, this intelligence focus was internally oriented. Colombia had developed strong capabilities for assessing domestic threats, but this was not matched by a capacity to monitor external or regional developments. By 2017, there was a growing need for the U.S. to have regional partners capable of understanding broader dynamics in the hemisphere. Venezuela was becoming increasingly

[26] Mariana Martinez, "Interview with Former Vice Minister of Defense of Colombia about ICB," June 9, 2025.

[27] David Spencer, "Interview with Dr. David Spencer, William J. Perry Center for Hemispheric Defense Studies, on US ICB Efforts in Colombia," June 13, 2025.

[28] Juan Carlos Pinzon, "Meeting with Former Colombian Minister of Defense Juan Carlos Pinzon on Importance of ICB," March 20, 2025.

belligerent in its regional actions, supported by a sophisticated Cuban intelligence service, as well as other extra-regional actors such as Russia, which supplied military equipment, and China, which extended substantial loans to sustain the authoritarian regime.[29, 30, 31]

During the 2018 visit by then Defense Secretary James Mattis to Colombia, he and his counterpart, Minister Guillermo Botero, agreed to explore ways to develop the strategic defense intelligence relationship between the two countries.[32] This would begin by first scoping Colombia's strategic defense intelligence capabilities. After about a year of meetings at both senior and practitioner levels, we agreed that moving forward with this initiative would require supporting Colombia in developing this capability. A key issue that needed to be addressed was the institutional capacity of Colombia's defense intelligence agencies, of which there were four.

Not unlike the institutional issues addressed earlier with the Ministry of Defense in 2008, some of the key areas requiring reform included professionalizing the civilian intelligence workforce, improving ministry-level intelligence policy and strategy planning, and standardizing analytical tradecraft across the intelligence agencies. The U.S. and Colombia developed an ICB program to address these shortfalls and continue to this day working on this line of effort.

While this program still has a long way to go before it can be fully realized – and in the face of the increasing insecurity challenges Colombia is once again facing – this example highlights where future ICB opportunities lie, especially given the current era of intensified great power competition. Other opportunities for institutional reform are not limited exclusively to DoD ICB programs but also exist through alternative channels, which can support U.S. national interests.

Under the recommendation and sponsorship of the United States, Colombia began developing a relationship with NATO in 2013, starting with an "Agreement on Cooperation and Security Information." [33] While this initial agreement focused solely on information sharing, it marked the first step in establishing a more substantive, two-way relationship. Colombia was interested in learning from NATO about transparency and interoperability, among other institutional practices, while NATO was particularly interested in Colombia's experience with irregular warfare.[34] As part of its focus on

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[29] Dr R Evan Ellis, "The Collapse of Venezuela and Its Impact on the Region," *MILITARY REVIEW*, 2017, https://www.servizisegreti.com/wp-content/uploads/2017/08/The-Collapse-of-Venezuela-and-Its-Impact-on-the-Region-R-Evan-Ellis.pdf.

[30] Ulf Thoene et al., "Russia in Latin America: Why Support Venezuela in a Crisis?," *International Social Science Journal* 73, no. 248 (2023): 627–39, https://doi.org/10.1111/issj.12424.

[31] Francisco Dominguez, "The Venezuela-China Strategic Relationship and the Building of a Multipolar World," *World Review of Political Economy* 15, no. 4 (2024): 582–610.

[32] "Readout of Secretary of Defense James N. Mattis' Meeting with Colombia Minister of Defense," U.S. Department of Defense, accessed June 20, 2025, https://www.defense.gov/News/Releases/Release/Article/1606125/readout-of-secretary-of-defense-james-n-mattis-meeting-with-colombia-minister-o/https%3A%2F%2Fwww.defense.gov%2FNews%2FReleases%2FRelease%2FArticle%2F1606125%2Freadout-of-secretary-of-defense-james-n-mattis-meeting-with-colombia-minister-o%2F.

[33] Robert Helbig and Guillaume Lasconjarias, *Winning Peace and Exporting Stability: Colombia as NATO'S next Global Partner?* (NATO Defense College, 2017), https://www.jstor.org/stable/resrep10240.

[34] "NATO Review - Colombia at NATO: How a South American Nation Became a NATO Partner," NATO Review, January 20, 2025, https://www.nato.int/docu/review/articles/2025/01/20/colombia-at-nato-how-a-south-american-nation-became-a-nato-partner/index.html.

improving transparency, Colombia joined NATO's Building Integrity (BI) Programme in 2013. The program provides a step-by-step methodology for improving transparency and governance through a self-assessment and peer review process, which Colombia completed in 2016. This opened the gate for Colombia to further deepen its relationship with NATO, culminating in 2018 with both Colombia and NATO signing an agreement establishing Colombia as the first NATO Global Partner in the region.[35] By 2019, several Colombian military schools, including its International Demining Centre (CIDES) were formally recognized as part of NATO's Partnership Training and Education Centre (PTEC), enabling NATO members to attend.[36] While these steps were taken directly between Colombia and NATO, they aligned with U.S. national interests by strengthening a key regional partner and reducing its susceptibility to malign influence amid the intensifying threat of great power competition. This underscores the strategic value of future institutional reform initiatives with like-minded partners.

Conclusion and Policy Recommendations

Security cooperation has undergone multiple transformations over the decades, transitioning from supporting the U.S. containment strategy, to a post–Cold War counternarcotics focus in Latin America, to an emphasis on both counternarcotics and counterterrorism post-9/11, as illustrated in the Colombia case study. During this time, ICB has grown from a peripheral activity to a central pillar of security cooperation, especially after 2017. This growing emphasis on defense institutions is exemplified by its maturity in Colombia. Initially focused on strengthening civilian control of the military, ICB has expanded to support U.S. national interests in an era of great power competition. As the U.S. increasingly looks to allies and partners to take on greater burden-sharing and assume more responsibility for their own security and defense, strengthening institutional capacity is paramount. Colombia's experience underscores this point.

Based on the lessons learned from the Colombia case study, the following policy recommendations aim to enhance the effectiveness and strategic value of ICB as a core component of U.S. security cooperation.

- **U.S. Must Increase ICB Efforts** – As the U.S. calls for increased defense spending and greater burden sharing from its partners, this will require enhanced institutional capacity to manage increased responsibilities and military capabilities effectively. ICB is not a one-time program, defense institutions are continually evolving and must adapt to new challenges. Therefore, ICB must be considered a permanent activity. Despite its importance, ICB currently represents less than eight percent of overall security cooperation efforts.[37] Expanding ICB will require sustained investment and attention, and increased investment in DoD implementers such as ISG and the Regional Centers for Strategic Studies.

- **Strategic Alignment Is Critical to Success** – As the Colombia case study demonstrated, when U.S. and partner nation strategic interests are not aligned, as was the case when the U.S.

[35] Helen Murphy, "Colombia to Be NATO's First Latin American Global Partner," Emerging Markets, *Reuters*, May 26, 2018, https://www.reuters.com/article/us-colombia-nato-idUSKCN1IR0E8.

[36] NATO, "Relations with Colombia," NATO, October 3, 2024, https://www.nato.int/cps/en/natohq/topics_143936.htm.

[37] "Information Based on Analysis Made within Defense Security Cooperation Agency on the Expenditures between ICB and Section 333.," 2025.

prioritized counternarcotics while Colombia focused on counterterrorism, results tend to be limited. However, when both countries aligned their efforts, outcomes significantly improved. Ensuring strategic alignment is essential not only for ICB program success but also for advancing broader U.S. national interests. Finding and sustaining strategic alignment requires consistent engagement at every level, from political and defense leaders to working-level planners, beginning before the inception of ICB efforts through its execution to ensure priorities remain coordinated and mutually reinforcing.

- **Getting Partner Buy-In and Identifying Agents of Change** – Attempting to implement ICB programs without sufficient partner buy-in is a recipe for failure. It is important to take the time to work with the partner to identify institutional gaps and tailor any potential solutions to their specific needs. Throughout this process, it is essential to recognize that partners are not monolithic organizations—they contain competing interests and divergent views. Taking the time to identify and empower agents of change who can champion ICB programs within their institutions is key ingredient to long-term success. Political and senior leader engagement early on is a powerful tool in shaping these efforts.

- **Proper Prioritization and Sequencing** – ICB programs must be well-targeted, with deliberate attention given to the order and timing of implementation. While the broad application of ICB may seem attractive in countries of strategic importance, this case study demonstrates that uncoordinated or simultaneous efforts across different defense institutions can lead to misaligned outcomes. In Colombia, although the military had developed strong operational capabilities, the Ministry of Defense lacked the institutional foundation to manage those capabilities effectively. Had institutional reforms started with the services instead of the Ministry, or had both undertaken reforms at the same time, the institutional planning and accountability systems developed by each service would likely have diverged, resulting in weaker institutional outcomes throughout the defense enterprise.

- **U.S. Should Promote Partner Reform Through Aligned Implementers** – The U.S. should encourage partners to pursue institutional reform through aligned implementers like NATO when it advances shared strategic interests. Colombia's engagement with NATO, starting with information sharing and expanding to the Building Integrity Programme, complemented U.S. ICB efforts and strengthened governance. It also ensured that Colombia improved its interoperability with NATO. Such partnerships can deepen reforms, extend impact, and reinforce alignment in an era of great power competition.

Question for Forum:

- Why is ICB important in the region given Great Power Competition around the world?

- Does DoD have enough capacity to conduct ICB worldwide?

- Does the U.S. have an advantage with ICB in the region?

- How do ICB efforts in security ministries fit with Chinese dominance in the internal security arena?

- Why is strategic alignment important and how do you identify if countries are properly aligned for ICB?
- How important is political and senior leader engagements in promoting ICB efforts?
- Can ICB be sustained long enough to make a difference in today's political environment?
- Does DoD have the mechanisms and cultural context to identify agents change?
- What are the differences between ICB efforts that U.S. executes versus those of NATO?
- What other international partners and organization that could provide ICB like support?

Background Research - Paper 8

Gates Forum IV

From Stabilization to Competition: Adapting the Anti-Fragility Playbook to A New Strategic Challenge

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W&M GLOBAL RESEARCH INSTITUTE

I. Executive Summary

"Fragility" has become a forgotten, if not dirty, word in Washington, much like "democracy promotion," "nation-building," and perhaps even "development." As relics of post-9/11 U.S. foreign policy, these concepts are seen as, at best, irrelevant to the national security challenges now confronting the United States—strategic competition against major powers like Russia and China as well as the authoritarian regimes, such as Iran and North Korea, with which they consort. At worst, bipartisan critics allege that U.S. attempts to improve the social and political conditions in countries beset by conflict, riven with cleavages, and/or poorly governed were always quixotic, a costly and misguided overreach which must be guarded against going forward.

Thus, with the bipartisan understanding that the United States no longer needs or should engage in stabilization missions, the last two decade's worth of hard-earned lessons of how to work in fragile states—culminating and codified in the Global Fragility Act (GFA) of 2019—are being forgotten. And many of the agencies, capabilities, and personnel built up to deal with this challenge, dismantled.

This is a momentous strategic mistake. Whatever the discontents of post-9/11 U.S. foreign policy, working in and with fragile states cannot merely be rejected as a particular to the war on terror with no relevance to strategic competition. To the contrary, fragility features prominently on the geopolitical chessboard on which the U.S.'s competitions with China and Russia will play out. The United States cannot and does not confront China or Russia alone, nor do those revanchist powers seek to undo American primacy on their own. Many of the partners sought by both sides in this competition are fragile.

Most crucially, the security alliance the United States seeks to build to contain Chinese ambition in the Pacific has among its potential members many fragile states. Some 40 percent of the countries in the area of operations of U.S. Indo-Pacific Command (INDOPACOM) are fragile.[1] This includes several that already are, or the United States desires as, partners, including India and the Philippines. As the United States seeks to build a "networked security architecture capable of deterring aggression, maintaining stability, and ensuring free access to common domains" in the Indo-Pacific, it will have to consider whether and how the fragility of its partners will impact the effectiveness of those partnerships.[2]

Moreover, China's competitive strategy is based on undermining U.S. influence globally, not just in the Indo-Pacific. Much of its focus is on fragile states: of the top 20 recipients of Chinese financial flows in commitments in 2021, the last year for which there is data, 17 were flagged as having an "elevated warning," or higher, for instability by the Fragile States Index. As China seeks political influence, access to economic markets, or to extract resources to fuel its rise, it will find it easier to make inroads among fragile states than those with more stable governments.

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[1] Fund for Peace, *Fragile State Index*, accessed October 20, 2025, https://fragilestatesindex.org/country-data.
[2] United States Department of Defense, *Summary of the 2018 National Defense Strategy: Sharpening the American Military's Competitive Edge* (Washington, DC: U.S. Department of Defense, 2018), https://media.defense.gov/2020/May/18/2002302061/-1/-1/1/2018-NATIONAL-DEFENSE-STRATEGY-SUMMARY.PDF, p. 9.

Similarly, for fragile states, China's lack of concern about human rights and governance issues makes it a more attractive partner than Western assistance with its conditionality. That is particularly true when China offers fragile states technology to better control their societies precisely in order to obviate the need to govern better.

To succeed in this strategic competition, therefore, the United States must preserve its ability to work in and with fragile states, especially to deliver security assistance to them. The United States must be able to both enhance the capabilities of partner forces in geopolitically crucial arenas and secure U.S. influence in states where its competitors seek advantage. This means maintaining the lessons of the GFA but adapting them from the mission of stabilizing fragile states to competing by, with, and through them.

There are four main such lessons for working with fragile states.

First, fragility is a political condition marked by the breakdown of trust between state and society. Second, security assistance is a double-edged sword, both necessary for stability but also often used by fragile regimes against their people. Third, any attempt to deal with fragility must be driven by a comprehensive, coordinated strategy. The fourth and final principle, thus, calls for alignment of effort across all of government in addressing fragility.

Put together these principles point to the need for a unique and dedicated strategy, policy instruments, bureaucratic processes and structures, and personnel for providing security assistance to fragile states for the purpose of strategic competition. Because of the challenges of working with fragile states, it is imperative that there be a process to consider the strategic value of any particular partner. If it is fragile, the United States should provide it with security assistance only if is deemed strategically vital—either as a security partner to contain Chinese power or to gain influence and deny it to U.S. competitors.

The security assistance to such states must both meet partners where they are and be formulated with realistic expectations of what they might be able to achieve, not to mention of how security assistance might distort their political situation. Fortunately, security assistance provided for strategic competition, rather than counter-terrorism, might actually be less likely to exacerbate fragility. It should provide fragile partners with military capabilities—such as maritime interdiction and patrol, low-cost, attritable defensive technologies, and training in logistics and sustainment—designed to harry, delay, and obstruct competitors' attempts at power projection or assist in supporting U.S. global missions, while avoiding offensive capabilities that states might turn against their populations.

Developing and executing such a strategy will require adopting institutional and policy changes to the current security assistance apparatus. With a significant rethinking underway of the U.S. foreign assistance architecture, now is the time to build structures within U.S. government that can work with fragile states to advance U.S. national security interests. These structures should include an interagency coordination process convened by the National Security Council (NSC), a new agency within the Department of Defense (DOD) to implement security assistance missions, an expanded and elevated planning function within the Department of State, and new,

expeditionary career tracks for military and diplomatic personnel to focus on deeply understanding and working with these partners.

An NSC-convened high-level coordination mechanism should consider proposals to provide security assistance to a given fragile state by weighing their strategic value against the cost and complexities of operating there.

The DOD should stand up a new Security Assistance Agency (SAA) to coordinate, plan, and house the capabilities to execute security assistance missions across all U.S. partners, but with a special set of capabilities focused on fragile states. The SAA would have two primary components: the Security Assistance Forces Directorate and the Regional Directorate. The former should be responsible for providing doctrine, training, planning, preparation, evaluation, and lessons learned for all U.S. security assistance missions. The latter should house country-specific and fragility expertise.

The Department of State should take on the responsibility of assessing states for their suitability for security assistance, developing planning for how to provide such assistance responsibly, and aligning U.S. country and regional policies in support of those missions. To carry out these tasks, State should stand up a new office run by the Assistant Secretary for Political-Military Affairs within the Arms Control and International Security pillar. It would have the responsibility of aligning other U.S. diplomatic and programmatic activity within a partner state, working with the ambassador and other country teams, in support of the security assistance mission.

Finally, and perhaps most importantly, to enable these new bureaucratic structures, new skills will have to be developed in U.S. military and diplomatic personnel. The SAA should provide a career path for U.S. military Foreign Area Officers (FAOs) to build deep knowledge of the militaries of specific countries. The emphasis for SAA personnel should be on deployability. They should function primarily in the field, based at U.S. embassies or country mission teams, but embedded with partner forces. At State, civilian personnel should focus on developing expertise in designing and providing security assistance for fragile partners, both in Washington and in the field. U.S. missions in fragile states should include a fragility expert from Pol-Mil. They should also be seconded to the SAA Regional Directorate and embedded within security assistance missions to advise and evaluate their implementation.

Whether seeking to increase the capabilities of its partners in geopolitically vital arenas or reduce China's attempts to build global networks and influence, fragility is an inherent part of 21st century competition. To win that competition, the United States need to learn from and adapt the GFA, not forget it.

II. Fragility at Dusk

The indicators were already there in the decade following the end of the Cold War and the collapse of the Soviet Union. From Mogadishu in 1993 to East Timor and Yemen in 2000, the national security salience of, and focus of U.S. military operations on, failing and failed states announced itself well ahead of the September 11, 2001, terrorist attack. Yet, it was only during the subsequent wars in Afghanistan and Iraq that the United States began to grapple seriously

with the question of how to restore security and stability in areas wracked by conflict and lacking functional governance. Confronted with the enormity of that challenge and concerns that the threats posed by states failure—instability, conflict, terrorism, transnational crime— could spill across borders and metastasize across regions, policymakers also began to think about not only how to stabilize failed states but apply preventative measures to fragile ones.

By the time answers began to arrive, a decade, if not a decade-and-a-half later, the sun was already setting on fragility as an urgent U.S. national security concern. Its relevance nevertheless endures, particularly for security assistance. Regardless of whether or not the United States ever again undertakes to stabilize fragile states or reconstruct failed ones, its global interests will almost certainly tempt it to offer security cooperation to forces in such states. In navigating the tricky questions of whether and how to do so, future policymakers can and should be guided by the understanding of fragility and four key principles for addressing it generated by their predecessors' nearly two decades of experience with it.

A flurry of studies inside and outside of the U.S. government sought to systematize, assess, and build on those experiences through the 2010s. At the forefront of that effort were those on the ground with the most direct view of what worked, and more often did not, in Afghanistan and Iraq. Starting in 2006, the Special Investigators General for those two conflicts produced—and, in the case of Afghanistan, continue to produce—"hard lessons" from U.S. reconstruction attempts, often focused on the nitty-gritty details of contracting, procurement, and personnel management in order to recommend changes that might improve outcomes in those particular conflicts.[3]

One of the hardest of those lessons was that "the U.S. government had neither the established structure nor the necessary resources to carry out the reconstruction mission it took on."[4] To address that shortcoming, the learning process moved from the battlefield to Washington, seeking to distill general principles that might apply to future U.S. encounters with failed and failing states and translate them into organizational and policy changes. The Department of State, the U.S. Agency for International Development, and the DOD produced the 2018 "Stabilization Assistance Review."[5] Congress, in 2017, called for a "comprehensive plan to prevent the underlying causes of extremism in fragile states," which was produced by a bipartisan, non-governmental task force convened the U.S. Institute of Peace (USIP) two years later.[6] The Task

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[3] Special Inspector General for Iraq Reconstruction (SIGIR), *Hard Lessons: The Iraq Reconstruction Experience* (Washington, D.C.: SIGIR, February 2009), https://web.archive.org/web/20130516012407/http://www.sigir.mil/files/HardLessons/Hard_Lessons_Report.pdf#view=fit; Special Inspector General for Afghanistan Reconstruction (SIGAR), *A Broken Aid System: Delivering U.S. Assistance to Taliban-Controlled Afghanistan* (Washington, D.C.: SIGAR, August 2025), https://www.sigar.mil/Portals/147/Files/Reports/lessons-learned/SIGAR-25-29-LL.pdf,

[4] Special Inspector General for Iraq Reconstruction (SIGIR), *Hard Lessons: The Iraq Reconstruction Experience* (Washington, D.C.: SIGIR, February 2009), https://web.archive.org/web/20130516012407/http://www.sigir.mil/files/HardLessons/Hard_Lessons_Report.pdf#view=fit p. ix.

[5] United States Department of State, *Stabilization Assistance Review: A Framework for Maximizing the Effectiveness of U.S. Government Efforts to Stabilize Conflict-Affected Areas* (Washington, D.C.: U.S. Department of State, 2018), https://2021-2025.state.gov/wp-content/uploads/2019/06/SAR-Final.pdf.

[6] House Committee on Appropriations, *Consolidated Appropriations Act, 2017: Committee Print of H.R. 244 / Public Law 115-31.* 115th Cong., 1st sess. (Washington D.C.: U.S. Government Publishing Office, 2017),

Force, in coming up with a strategy to stop the spread of terrorism to new fragile states, also considered the reality that, increasingly, the countries most at risk for exploitation by extremists were also the same ones in which U.S. adversaries were seeking, and gaining influence. Its report, thus, included strategic, policy, and bureaucratic recommendations for how the United States should develop and apply country-specific plans to combat the twin and evermore intertwined threats of fragility and competition. The new preventive strategy that the Task Force envisioned, however, was not geographically confined, as was its congressional mandate, to the Sahel and East Africa but rather globally applicable anywhere U.S. interests required it build firewalls against adversaries seeking to weaken, exploit, or control the polities of its partners.

Drawing on these governmental studies—but also bolstered heavily by academic and policy research conducted into state failure and weakness, non-governmental organizations, aid groups, and other practitioners drawing on their own rich experiences working in fragile environments, and other governmental strategies that pointed to fragile states as an ongoing national security concern requiring different approaches than had thus far been undertaken—Congress moved to systematize and institutionalize principles for effective stabilization. The result was the GFA, passed in December 2019.[7] That law directed the executive branch to engage in an interagency effort to "establish a comprehensive, integrated, ten-year strategy…to contribute to the stabilization of conflict-affected areas, address global fragility, and strengthen the capacity of the United States to be an effective leader of international efforts to prevent extremism and violent conflict."[8] The resulting "Global Fragility Strategy" was published in 2020 and amended two years later.[9]

III. The Lessons of Fragility

The lessons generated from this years-long study of stabilization efforts and captured in both the GFA and the Global Fragility Strategy can be boiled down to four key principles: fragility is an inherently political condition; security is paramount to stability; engagement with fragile states has to be guided by a comprehensive strategy; and U.S. policy efforts have to be coordinated across all relevant departments and agencies.

A. Fragility is Political

While the immediate post-9/11 narrative described places from which terrorist organizations were able to operate, like Afghanistan or Somalia, as "ungoverned spaces" or "weak states," they are now understood to suffer not from a lack of institutional strength but a deficit of legitimacy.

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https://www.govinfo.gov/content/pkg/CPRT-115HPRT25289/pdf/CPRT-115HPRT25289.pdf; Task Force on Extremism in Fragile States, *Preventing Extremism in Fragile States: A New Approach* (Washington, D.C.: United States Institute of Peace, February 2019), https://www.usip.org/sites/default/files/2019-02/preventing-extremism-in-fragile-states-a-new-approach.pdf.

[7] 22 U.S.C. Ch. 105 (Prelim. ed.), accessed October 20, 2025, https://uscode.house.gov/view.xhtml?path=/prelim@title22/chapter105&edition=prelim.

[8] 22 U.S.C. § 9803(a) (Prelim. ed.), accessed October 20, 2025, https://uscode.house.gov/view.xhtml?path=/prelim@title22/chapter105&edition=prelim.

[9] United States Department of State, *United States Strategy to Prevent Conflict and Promote Stability* (Washington, D.C.: U.S. Department of State, 2020), https://www.state.gov/wp-content/uploads/2021/01/2020-US-Strategy-to-Prevent-Conflict-and-Promote-Stabilit-508c-508.pdf; U.S. Department of State, *Prologue to the United States Strategy to Prevent Conflict and Promote Stability* (Washington, D.C.: U.S. Department of State, 2022), https://www.state.gov/wp-content/uploads/2022/06/CSO-2022-SPCPSprologue-EN-FINAL-508-Accessible-05172022.pdf.

Defined as "the absence or breakdown of a social contract between people and their government," fragility is a political condition because it is not, solely or necessarily, about what the government is able to do but the relationship between state and society.[10] As that relationship frays—whether through the real or perceived inability of the government to meet peoples' needs or its outright disinterest in doing so—the potential for resentment, criminality, and corruption presents itself. Indeed, fragility can often be caused by the actions of the state, particularly if it is exclusive, oppressive, corrupt, or unresponsive, just as much as by inaction. As the gap between state and society widens, it can turn into radicalization, instability, and conflict. Addressing fragility, therefore, is the necessarily political task that "requires decisions about which specific legitimate political systems and actors we will support, why and how, and associated tradeoffs."[11]

A close corollary of this principle is that fragility is heavily contextual. Each fragile state is fragile in its own ways. The grievances that have eroded the state-society bond, and even the level at which that bond has been weakened—local, regional, national—are unique and specific.

B. Security Matters

Yet, one universally true condition, is that security is *sine qua non* of stabilization. Fragile states will remain thus if a persistent level of violence, or even perceived insecurity among its citizens, endures. However, the insecurity bedeviling stabilization efforts is less likely to be a function of external violence or interstate conflict and more often to be intrastate, and especially state-backed, violence.

Indeed, underscoring the political nature of fragility, a 2017 United Nations (UN) study of the drivers of extremism in Africa found that "confidence in security agencies, or lack thereof, has been established as a crucial factor influencing the spread of violent extremism."[12] Moreover, of the more than 700 former members of extremist groups interviewed in the study, 71 percent said "government action," including "killing of a family member or friend" and "arrest of a family member friend," was the tipping point that convinced them to join the group.[13] The role of security forces, and overreaction to terrorist threats, in worsening the fragility they are putatively meant to shore up is one of the thorniest chicken-and-egg challenges of stabilization: a base-level of safety is required for society to begin rebuilding trust in government, but they often do not trust the government to provide, or the government is unwilling or incapable of providing, that safety.

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[10] William J. Burns, Michele Flournoy, and Nancy E. Lindborg, *U.S. Leadership and the Challenge of State Fragility* (Washington, D.C.: United States Institute of Peace, 2016), https://www.usip.org/sites/default/files/US-Leadership-and-the-Challenge-of-State-Fragility.pdf, p. 7.

[11] United States Department of State, *Stabilization Assistance Review: A Framework for Maximizing the Effectiveness of U.S. Government Efforts to Stabilize Conflict-Affected Areas* (Washington, D.C.: U.S. Department of State, 2019), https://2021-2025.state.gov/wp-content/uploads/2019/06/SAR-Final.pdf, p. 6.

[12] United States Development Programme, *Journey to Extremism in Africa: Drivers, Incentives and the Tipping Point for Recruitment* (New York: UNDP Regional Bureau for Africa, 2017), https://journey-to-extremism.undp.org/content/v1/downloads/UNDP-JourneyToExtremism-report-2017-english.pdf, p. 65.

[13] United States Development Programme, *Journey to Extremism in Africa: Drivers, Incentives and the Tipping Point for Recruitment* (New York: UNDP Regional Bureau for Africa, 2017), 74, https://journey-to-extremism.undp.org/content/v1/downloads/UNDP-JourneyToExtremism-report-2017-english.pdf, p. 74.

Nor is the security sector the only part of government that contributes to the problems of fragility and complicates stabilization. That same 2017 UN study exposed a dramatically low level of overall trust in the state in the former extremists it studied: 83 percent agreed that "government only looks after the interests of a few."[14] This distrust cut across all levels of government—national and local—and most government institutions.

C. The Need for Comprehensive Strategies

Whatever specific, unique grievances might first erode the state-society bond, it quickly spreads outward. For this reason, there can be no tailored, narrow antidote to any given country's fragility. That is why the third principle of addressing fragility holds that any attempt to do so must be driven by a comprehensive strategy. Attempting to stabilize a state through just a singular program, while other U.S. government initiatives pursue different priorities through uncoordinated programs is a recipe for failure.

Instead, the United States must first determine if, in fact, addressing the stability of a country is its fundamental objective for that country. If it is, it requires a comprehensive strategy that subordinates and evaluates all U.S. government programs and contacts with that state to the ultimate goal of stabilization.

D. Whole of Government Approach

For this reason, the fourth and final principle calls for alignment of effort across all of government in addressing fragility. Across all the lessons learned exercises undertaken over the last two decades, the challenge of coordination and the counterproductive effect of its absence is the most commonly identified issue stymying stabilization efforts. As the 2019 USIP report put it, "too often, security, political, and development challenges are tackled separately instead of in relations to one another. Bureaucratic impediments provided disincentives for more effective and coordinated action…."[15] That is why perhaps the most important goal of the Global Fragility Strategy has been to "improve prioritization, integration, and efficiency in all planning, diplomatic, foreign assistance, defense engagement, and other operations in fragile states…."[16]

IV. Competition Amid Fragility

The GFA and Strategy arrived seemingly at the dusk of U.S. interest in fragile states, associated as they were in the American national security policy with the war on terror, and the dawn of a new strategic priority. Nearly two years previously, the 2018 National Defense Strategy had declared that "Inter-state strategic competition, not terrorism, is now the primary concern in U.S. national security."[17] Fragility and competition, as the USIP Task Force had argued, share a good

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[14] United Nations Development Programme, *Journey to Extremism in Africa: Drivers, Incentives and the Tipping Point for Recruitment* (New York: UNDP Regional Bureau for Africa, 2017), https://journey-to-extremism.undp.org/content/v1/downloads/UNDP-JourneyToExtremism-report-2017-english.pdf, p. 82.

[15] United States Institute of Peace, *Preventing Extremism in Fragile States: A New Approach* (Washington D.C.: U.S. Institute of Peace, 2019), https://www.usip.org/sites/default/files/2019-02/preventing-extremism-in-fragile-states-a-new-approach.pdf, p. 38.

[16] United States Department of State, *United States Strategy to Prevent Conflict and Promote Stability* (Washington, D.C.: U.S. Department of State, 2020), https://www.state.gov/wp-content/uploads/2021/01/2020-US-Strategy-to-Prevent-Conflict-and-Promote-Stabilit-508c-508.pdf, p. 9.

[17] United States Department of Defense, *Summary of the 2018 National Defense Strategy: Sharpening the American Military's Competitive Edge* (Washington D.C.: U.S. Department of Defense, 2018),

deal in common. Though the United States might now find itself focused on the competition with near-peer powers like Russia or China, the playing field on which that competition is taking place remains occupied by fragile states.

The role of fragility in strategic competition manifests itself in two key ways. Both are a function of the reality that the United States does not and cannot face revisionist and autocratic actors alone. Its existing partners and allies, equally dependent upon and committed to a world built on the free and open flow of goods and ideas, are equally at risk from powers who seek to upset that order. Nor, faced with multiple global competitors and accelerating technological change, can the United States preserve its strategic advantages alone. Its primacy and prosperity in the 21st century will depend on its ability to attract and keep partners by its side and, conversely, deny its competitors from amassing a critical coalition.

Fragility plays a role in both these strategic challenges. First, as an issue for the United States in shoring up and expanding its partnerships. Not an inconsiderable number of the states that would present a geostrategic advantage to keep in the U.S. column happen to be fragile. Second, as an issue in countering primarily Chinese, but also to some extent Russian, attempts to build their own strategic partnerships. Not only are many of the states in which Beijing is active fragile, but it their fragility will tend to make them more amenable to Chinese overtures.

A. A Fragile Battlefield

"By working together with allies and partners," the 2018 National Defense Strategy observes, "we amass the greatest possible strength for the long-term advancement of our interests, maintaining favorable balances of power that deter aggression and support the stability that generates economic growth."[18] To stay ahead of its competitors, therefore, the United States will have to "strengthen and evolve our alliances and partnerships into an extended network capable of deterring or decisively acting to meet the shared challenges of our time."[19] In particular, the Strategy notes the importance of expanding U.S. partnerships in the Indo-Pacific—the very theater on the frontlines of any potential Chinese attempt to remake the international order in their favor.

Yet, while the area of operations of U.S. INDOPACOM boasts several extremely stable and strong U.S. partners, some 40 percent of the countries in the region are fragile.[20] Out of the 28 INDOPACOM countries that are scored by the Fragile States Index, not counting China, in 2024, 11 were considered to have an "elevated warning," or higher, of possible instability, seven were labeled with a "warning," and ten were considered "stable" or stronger. Only Myanmar is

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https://media.defense.gov/2020/May/18/2002302061/-1/-1/1/2018-NATIONAL-DEFENSE-STRATEGY-SUMMARY.PDF, p. 1.

[18] United States Department of Defense, *Summary of the 2018 National Defense Strategy: Sharpening the American Military's Competitive Edge* (Washington D.C.: U.S. Department of Defense, 2018), https://media.defense.gov/2020/May/18/2002302061/-1/-1/1/2018-NATIONAL-DEFENSE-STRATEGY-SUMMARY.PDF, p. 8.

[19] United States Department of Defense, *Summary of the 2018 National Defense Strategy: Sharpening the American Military's Competitive Edge* (Washington D.C.: U.S. Department of Defense, 2018), https://media.defense.gov/2020/May/18/2002302061/-1/-1/1/2018-NATIONAL-DEFENSE-STRATEGY-SUMMARY.PDF, p. 8.

[20] Fund for Peace, *Fragile State Index*, accessed October 20, 2025, https://fragilestatesindex.org/country-data.

considered on “alert” and almost breaks into the top ten most fragile stats in the world, ranked 11th out of 179. But multiple other regional countries that are already U.S. partners or whose cooperation would be a strategic boon for the United States find themselves in the middle tier of “elevated warning” for possible collapse or conflict: the Philippines, India, and Papua New Guinea among them.

	2024		
	Rank	Score	
Myanmar	11	100	Alert
Sri Lanka	33	88.2	High Warning
Bangladesh	37	85.9	High Warning
North Korea	40	84.9	High Warning
Papua New Guinea	54	78.8	Elevated Warning
Nepal	57	78	Elevated Warning
Solomon Islands	58	77.6	Elevated Warning
Philippines	64	75.1	Elevated Warning
Timor-Leste	67	74.8	Elevated Warning
Laos	71	73.8	Elevated Warning
India	75	72.3	Elevated Warning
Micronesia	93	66.9	Warning
Fiji	94	66.4	Warning
Thailand	95	66.2	Warning
Bhutan	98	64.5	Warning
Samoa	101	63.9	Warning
Indonesia	102	63.7	Warning
Maldives	107	60.3	Warning
Vietnam	119	56.2	Stable
Cambodia	55	55	Stable
Brunei	123	53.9	Stable
Malaysia	126	53.1	Stable
Mongolia	132	50.7	Stable
Japan	160	30.2	Very Stable
South Korea	161	29.8	Sustainable
Singapore	165	25.4	Sustainable
Australia	169	19.6	Very Sustainable

New Zealand	175	15.9	Very Sustainable

As the United States seeks to build a "networked security architecture capable of deterring aggression, maintaining stability, and ensuring free access to common domains" in the Indo-Pacific, it will have to consider whether and how the fragility of its partners will impact the effectiveness of those partnerships.[21]

B. The Fragility Competitive Advantage

Though it might be where Chinese and U.S. power come most directly into contact, the Indo-Pacific is far from the only arena for 21st century strategic competition. As detailed elsewhere in this volume, especially in the Samantha Custer's study of security assistance in the Global South, Russia and China are active across the world, offering countries various forms of assistance and investment in return for access, influence, and resources.

China, through its Belt and Road Initiative and other development and lending programs, targets predominantly fragile states. Of the top 20 recipients of Chinese financial flows in commitments in 2021, the last year for which there is data, 17 were flagged as having an "elevated warning," or higher, for instability by the Fragile States Index. Indeed, multiple countries receiving significant Chinese assistance are among the top 30 most fragile states. In 2021, over $12 billion in Chinese funds flowed into Pakistan, ranked 29th that year. Nigeria, ranked 12th, got $571 million, and the 6th ranked Central African Republic received more than $200 million.

Fragility can serve as both a push and pull factor driving Chinese engagement in these states—the often contested or unaccountable nature of governance in fragile states both makes them more attractive candidates for Beijing's strategic objectives and make China a more attractive partner for their governments.

As China seeks political influence, access to economic markets, or to extract resources to fuel its rise, it will find it easier to make inroads among fragile states than those with more stable governments. In particular high levels of corruption, or lack of accountability to the populace, encourage or enable leaders of fragile states to agree to terms that advantage Beijing—often saddling its partners with unsustainable debt loads or exploitative terms—that might not pass muster elsewhere.

Similarly, China's lack of concern about human rights and governance issues makes it a more attractive partner for fragile states. Where Western security assistance, development aid, or investments might come with conditionality, Beijing's support comes with no strings attached. At least not upfront strings about how to treat one's people. To the contrary, part of what China can offer fragile states are the tools and technology to better control their societies precisely in order to obviate the need to govern better. As Sheena Greitens writes in this volume, "public safety"

[21] United States Department of Defense, *Summary of the 2018 National Defense Strategy: Sharpening the American Military's Competitive Edge* (Washington D.C.: U.S. Department of Defense, 2018), https://media.defense.gov/2020/May/18/2002302061/-1/-1/1/2018-NATIONAL-DEFENSE-STRATEGY-SUMMARY.PDF, p. 9.

measures, such as enhanced surveillance systems, makes up a large part of Chinese security assistance, often to regimes who seek to use it to shore up their fragility and weakness.

V. Security Assistance to Fragile States: From Stabilization to Competition

Whether seeking to increase the capabilities of its partners in geopolitically vital arenas or reduce China's attempts to build global networks and influence, fragility is an inherent part of 21st century competition. With security assistance an important part of the U.S. competitive toolbox, this means that the United States must develop the capability to train and equip forces in fragile states effectively—both enhancing the capabilities of the partner force and advancing U.S. strategic position vis-à-vis its competitors.

To do so, security assistance will have to take on the key lessons identified above of how to engage with fragile states. Yet it will be important to draw distinction between the ends and context in which security assistance is being used. Much of the consideration of security assistance in the Global Fragility Strategy and documents that led up to and supported it is for the purpose of *stabilizing* fragile states. In the current strategic environment, however, security assistance should be considered as a means of *competing by, with, and through* fragile states. In the former, fragility is the problem that U.S. policy is trying to solve for. In the latter, it is a context that U.S. policy must navigate to accomplish its aims. Thus, while the same principles for dealing with fragility as identified above still hold, their application needs to be adapted to this new mission.

First, there must be an overall strategy for competition. Not just because U.S. engagement with fragile states often have not borne fruit but also because security assistance in particular comes with the risk of exacerbating fragility, it is vital that if the United States is going to train and equip a fragile partner that it does so as part of concerted and deliberate plan in pursuit of well-considered objectives.

When a potential partner the United States wants to make more capable in defending or deterring against its adversaries suffer from fragility, there should be sound strategic reasoning for recruiting them into a U.S.-led strategy. Either a vital geostrategic position, a realistic assessment of bringing to bear capabilities not available from another partner, or both would present good grounds for providing security assistance to a fragile state. But it should only be done after a thorough consideration and decision that doing so is a necessary part of a broader strategy and weighed against the challenges and possible downsides of working with fragile states.

This is even more important when it comes to fragile states in which the United States might be considering offering security assistance not necessarily because it seeks them as military allies but as a means of competing with China for influence. There are compelling cases in which currying favor with a country, even if it is fragile, might serve an important strategic purpose—such gaining for the United States, or blocking a competitor from, access to important basing or critical natural resources. In such instances, it is often security assistance that is the form of U.S. aid that is most attractive to the potential partner, especially a fragile one, and usually the easiest for Washington to deliver, making it a useful tool in the influence competition.

Using security assistance to seek influence should not become an end in and of itself, however. It must be tied to specific strategic objectives. In part because influence everywhere is not needed to win this competition. In fact, in some places, the United States might see an advantage from ceding the stage to China—allowing it to expend money and energy in states where it will gain little to no return. An even more significant reason to engage in security assistance-driven influence competition judiciously, though, is the risk of undermining U.S. interests. Fragile states tend to misuse military capabilities for regime preservation and internal security missions. Security force abuse can be a key driver of conflict and instability. That means that security assistance, unless dispensed prudently, can actually weaken fragile states. And the weaker a fragile state is, the more likely that U.S. competitors, not the United States, will be more attractive partners. In pursuing influence in fragile states too assiduously, the United States might actually strengthen its competitors.

This speaks to the second consideration of providing security assistance to fragile states for the purpose of strategic competition: it must be designed and delivered with fragility in mind. The United States might hope to develop all its partners to achieve the highest possible military capabilities, deploying the most advanced weapons system. In particular, the urge to sell cutting-edge American technology—both because a partner might crave it and to enhance U.S. commercial interests—might drive a more ambitious approach to equipping partners. However, security assistance has to both meet partners where they are and be formulated with realistic expectations of what they might be able to achieve, not to mention of how security assistance might distort their political situation.

Luckily, a U.S. policy focused on global strategic competition might be better suited to including fragile states than one in which counter-terrorism is the primary objective precisely because of the different expectation of partner forces for each mission. In training and equipping partner nations to hunt terrorists within their own borders, U.S. security assistance often provided fragile states with the very same capabilities they could use to fight and suppress political opponents. In trying to maintain, and extend, an international order in the face of revisionist competitors, however, the United States is more concerned about hardening the external defenses of its partners. It seeks to bolster partners' capabilities to deter and, if necessary, to defend themselves against external aggression. This is particularly true at sea, where maintaining the global freedom of commerce and navigation in the face of efforts to establish control over key waterways is a critical component of 21st century competition. Just as the American founders worried that standing armies might be "dangerous to liberty" but, with a navy, "every institution will grow and flourish in proportion to the quantity and extent of the means concentered towards its formation and support," so, too, in fragile states, U.S. security assistance focused on building maritime security capabilities might be less politically problematic than the counter-terror toolkit.[22]

Thus, for example, turning strong, middle-income states into regional security providers should include the full range of U.S. foreign military sales of high-end components and military

[22] "Federalist No., 29," in *The Federalist Papers*, Gideon (ed.), accessed October 20, 2025, https://oll.libertyfund.org/titles/jay-the-federalist-gideon-ed#lf1631_label_222; "Federalist No. 11," in *The Federalist Papers*, Gideon (ed.), accessed October 20, 2025, https://oll.libertyfund.org/titles/jay-the-federalist-gideon-ed#lf1631_label_192.

training, education, and exercise for joint, offensive operations. On the other hand, a low-income state with a recent history of, or potential for, instability could serve as a defensive bulwark but would not require or necessarily be able to afford or use high-end military capabilities. Likewise, the fiscal burden of trying to buy such systems or the temptation to use a well-equipped and -trained military into an internal security force could prove destabilizing and thus counter-productive.

Therefore, for states on the faultlines where U.S. and Chinese or Russian power collide, U.S. security assistance should pursue the more urgent objective of providing military capabilities that can harry, delay, and obstruct attempts at competitors' power projection, or assist in supporting U.S. global missions. In such cases, a focus on capabilities such as maritime interdiction and patrol, low-cost, attritable defensive technologies, and training in logistics and sustainment might be more appropriate. Matching such assistance with robust assessment, monitoring, and evaluation to ensure that it is both contributing to the development of desired partner capabilities and not being misused will be critical to both efficiently using taxpayer funds and avoiding worsening fragility.

The challenge for designing security assistance for fragile states grows greater as U.S. objectives shift from building partner capability to gaining influence. The weapons, technology, and training that regimes in fragile states might be interested in, are unlikely to coincide with what a fragility-sensitive approach would recommend. Worse yet, U.S. competitors might be willing to provide them with what they seek—special operations and internal security training, heavy weaponry, surveillance technology—with no conditionality.

In these cases, the United States must carefully weigh whether and when it wants to compete for influence. If there is an urgent strategic imperative to curry favor or gain access to a state, providing the desired security assistance to build that partnership quickly, regardless of any potential longer-term impacts on stability, might be judged necessary. More often, however, it might be more appropriate for U.S. security assistance to play a different role, seeking to build responsible and Western-oriented security leaders over a longer time-horizon. In these instances, where competition is more ideological than military, U.S. military and exchange programs can play a critical role in identifying and developing future military leaders who will be less receptive to authoritarian overtures.

VI. Recommendations

While elements of the GFA are useful in fitting U.S. security assistance to fragile states into a broader strategy for 21st century competition, actually executing such a strategy will require adopting institutional and policy changes, some of which were considered in the fragility literature and some of which are unique to the current challenge. With a significant rethinking underway of the U.S. foreign assistance architecture, and even of the national security enterprise more generally, now is the time to build the structures within U.S. government that can develop, execute, and sustain a long-term strategy of working with fragile partners to advance U.S. national security interests. These structures should include an interagency coordination process convened by the NSC, a new agency within the DOD to implement security assistance missions, an expanded and elevated planning function within the Department of State, and new, expeditionary military and civilian career tracks focused on building expertise on partner forces, security assistance, and fragility.

A. Create Interagency Strategic Coordination Mechanism

To be successful, U.S. engagement with fragile states needs to both be linked to achieving overarching strategic objectives and guided by an understanding of the specific constraints of fragility and unique needs of that partner. This can only be achieved, as the GFA made clear, through a joint, integrated approach that both incorporates all relevant U.S. departments and agencies into decision-making and then aligns their activities accordingly.

The Global Fragility Strategy sought to promote an integrated approach to fragile states by creating a high-level, interagency steering committee convened by the NSC. Comprised of representatives from the Departments of State and the Treasury, the U.S. Agency for International Development (USAID; **now dismantled**), and the Office of Management and Budget, the steering committee was designed as an oversight body. Implementation of the Global Fragility Strategy, meanwhile, was handled by a working-level secretariat, headquartered at State. This general framework should be maintained but adapted for the different objectives and emphasis of competition rather than stabilization.

First and foremost, the NSC-convened high-level coordination mechanism should remain, ideally as a policy coordination committee (PCC) chaired by the Senior Director for Strategic Planning.[23] The purpose of this body should be to align security assistance missions, specifically in fragile states, with the overall strategic direction and objectives of the United States. Therefore, it should consider proposals to provide security assistance to a given fragile state by weighing their strategic value against the cost and complexities of operating there. To this end, the committee should include representatives of the DOD and State—including from the Office for Foreign Assistance, Political-Military Affairs, and relevant regional bureau for the countries under consideration—as well as the Office of the Director for National Intelligence.

Given the security assistance focus of this mission set, the lead for implementation of any agreed upon country strategy should be the DOD, specifically a new Security Assistance Agency, as described below. However, the strategic assessment of the viability of fragile states as security

[23] "Organization of the National Security Council and Subcommittees," The White House, January 20, 2025, https://www.whitehouse.gov/presidential-actions/2025/01/organization-of-the-national-security-council-and-subcommittees/.

partners for the United States, as well as planning for how to carry out such assistance should they be selected, should continue to reside within the Department of State.

B. Create DOD Implementation Agency for Security Assistance

The effective implementation of security assistance programs requires two sets of key capabilities: the general expertise of how to build partner capacity and the specific expertise of the needs, politics, and challenges of a unique partner. These capabilities are currently spread across the DOD and indeed the entire U.S. government and assembled, if at all, in an ad hoc manner for each security assistance mission. For example, security force assistance missions are currently conducted by special operations forces, U.S. Army Security Force Assistance Brigades (SFABs), and the National Guard via its State Partnership Program. Each of these three different providers might have useful capabilities, but there needs to be a mechanism for selecting, assigning, and coordinating which units should be assigned to which security assistance missions as well as a central repository for lessons learned from each engagement.

Thus, a new structure is needed to combine, professionalize, and coordinate these different capabilities to better deploy security assistance as a tool for strategic competition. This is all the more important in fragile states where the provision of security assistance will have to be tailored and matched to the specific conditions of each partner.

To this end, DOD should stand up a new Security Assistance Agency (SAA) to coordinate, plan, and house the capabilities to execute security assistance missions across all U.S. partners, but with a special set of capabilities focused on fragile states.[24] SAA should be modeled on two other relatively recent DOD organizations: Special Operations Command (SOCOM) and Cyber Command (CYBERCOM).

SOCOM is unique in that it is a unified command that combines service component and theater commands. That is, it provides doctrine, training, equipment interoperability and standardization, command and control and other shared functions across special operations forces from all military branches. It also assigns those forces to theater-specific commands to meet the unique operational requirements of those geographic areas. Further, SOCOM provides its forces to other combatant commanders and American ambassadors to meet their operational needs.

SAA should function in a similar way to SOCOM by serving as both the overall command for all security assistance units and functions within the U.S. military as well as specific geographic expertise. Thus, SAA would have two primary components: the Security Assistance Forces Directorate and the Regional Directorate.

The former should be responsible for providing doctrine, training, planning, preparation, evaluation, and lessons learned for all U.S. security assistance missions and sharing those across units involved in carrying them out—whether they come from the special operations community, SFABs, the National Guard or other units. It should also seek out and include non-DOD units and capabilities that the United States might want to leverage to build partner capabilities. In particular for fragile states on the front lines of competition with China, these could include U.S.

[24] Strategic Studies Institute, *A Comprehensive Approach to Improvising U.S. Security Force Assistance Efforts* (U.S. Army War College, September 2009), https://apps.dtic.mil/sti/tr/pdf/ADA506951.pdf.

Coast Guard, intelligence, and law enforcement. As the objective of U.S. security assistance for the purpose of strategic competition shifts from creating forces capable of finding and fixing internal threats to ones that can deter and/or delay external threats, so too the units delivering that assistance need to change.

When U.S. special operations forces served as the tip of the spear against the global terrorism, it made sense that they would share that expertise and skillset with partner forces tackling the same threat. In an era of strategic competition, different skillsets and, therefore, different units might be the more relevant providers of security assistance. U.S. security assistance should be tailored to a specific role envisioned for each partner nation according to an NSC-driven comprehensive strategy. The role of the SAA Security Assistance Forces Directorate should be to select the U.S. units best suited to prepare the partner forces for that role. For an island nation in the Indo-Pacific facing Chinese incursions into its maritime zones, U.S. Coast Guard training on maritime patrol and interdiction might be most important. For other partners whose cyberspace is exploited by Chinese intelligence operations, it might be U.S. cyber forces that are best suited to providing the assistance that yields the greatest strategic benefit. Given this more expansive view of security assistance, the SAA should have the authorities to train and utilize a wide-range of units from across the armed forces and interagency.

At the same time, rather than assigning units to specific area of operations, an authority that would remain with combatant commanders, SAA could also house country-specific and fragility expertise in the Regional Directorate. These experts could be called back stateside to participate in program planning or training for units about to deploy to their area of expertise or deploy alongside those units in the field.

This dual structure of the Security Assistance Forces and Regional Directorates would also allow SAA to model itself on CYBERCOM by embracing the tension between competing military and civilian priorities. At CYBERCOM the possible conflict between intelligence collection and offensive operations in cyberspace is resolved by putting a single person in charge of both sides by dual-hatting them as both CYBERCOM commander and the Director of the National Security Agency but also by giving them a deputy that represents each side. Similarly, one of the key challenges for SAA will be navigating the tension between the desire to provide security assistance to as many partners as possible and the political reality that some countries might be too fragile to make good partners. The SAA commander's deputies—a military deputy in charge of the Security Assistance Forces Directorate and a civilian deputy leading the Regional Directorate—would represent each side of this strategic debate within the agency, with the commander, in conjunction with the interagency planning process, responsible for making the ultimate decision on whether to providing assistance to a given state serves overall U.S. strategic interests.

C. Expand and Strengthen GFA Secretariat within State

Any U.S. engagement with a fragile state, even if it is focused primarily on security assistance, will necessarily require coordination with departments and agencies outside of DOD. And even if the SAA is stood up within DOD, the diplomatic and development expertise for how to work in fragile and conflict-affected countries can and should remain within the Department of State. While a Secretariat was already created as part of the implementation of the GFA, State should

beef-up, expand, and elevate this structure to take on the responsibility of assessing states for their suitability for security assistance, developing planning for how to responsibly provide such assistance, and aligning U.S. country and regional policies in support of those missions.

Previously led by State's Bureau for Conflict and Stabilization Operations, as well as USAID's Bureau for Conflict Prevention and Stabilization, the GFA Secretariat should be transformed into a new Office of Competitive Engagement (OCE) run by the Assistant Secretary for Political-Military Affairs within the Arms Control and International Security pillar. This reflects both the closure of the previous bureaus that supported the secretariat but, more importantly, the shift in U.S. strategy toward fragile states—away from stabilization and toward security assistance; away from country-specific terrorist threats and toward integration into a global U.S.-led security architecture.

OCE, however, should continue its intra- and interagency cooperation. In particular, it should draw from and work closely with State's Office of Foreign Assistance and Human Rights to maintain and expand its ability to advise, plan, and program for U.S. engagements in fragile states leveraging the hard-earned best practices and lessons of the last two decades. Specifically, it should take the lead in evaluating the suitability of fragile countries for U.S. security assistance missions as part of the PCC planning process. If a country is selected as a security partner, OCE would take the lead, working closely with the SAA, to develop programmatic plans for how to deliver that assistance without exacerbating the country's fragility. Finally, it would be OCE's responsibility to align other U.S. diplomatic and programmatic activity within the country, working with the ambassador and other country teams, in support of the security assistance mission.

D. Create New, Expeditionary Career Tracks

Finally, and perhaps most importantly, to enable these new bureaucratic structures, new knowledge and skills will have to be developed in U.S. military and diplomatic personnel. Learning, and using, these new capabilities will require U.S. servicemembers and civilians to spend more time not just in the field, but in the same field.

The SAA should provide a career path for U.S. military Foreign Area Officers (FAOs) to build deep knowledge of the militaries of specific countries. The emphasis for SAA personnel should be on deployability. They should function primarily in the field, based at U.S. embassies or country mission teams, but embedded with partner forces. At OCE, civilian personnel should focus on developing expertise in designing and providing security assistance for fragile partners, both in Washington and in the field. U.S. missions in fragile states should include a fragility expert from Pol-Mil. They should also be seconded to the SAA Regional Directorate and embedded within security assistance missions to advise and evaluate their implementation. For both these new military and foreign service career tracks, new policies for recruitment, retention, and promotion will be needed to prioritize the building of long-term, on-the-ground expertise.

Discussion Questions for "From Stabilization to Competition"

1) Are fragile states a strategically important arena in the competition between the United States and revisionist and autocratic powers, like China?

2) If the United States does need to be able to compete in fragile states, should it prioritize one form such competition—either enhancing the defensive capabilities of frontline states or seeking greater influence in, and competitors' blocking access to, strategically important (resources, location, etc.) states?

3) What are the most important lessons the United States learned from more than twenty years pursuing counter-terrorism in failed and failing states about how to advance its interests in these environments? How do these lessons translate to the challenge of strategic competition?

4) If fragility is inherently political, and fragile regimes often use the enhanced military capabilities they gain from security assistance to maintain power, how should the United States balance between the strategic imperative of strengthening fragile partners to deter and defend against China, on the one hand, and the risks of exacerbating fragility, on the other? Are there situations where the risks are outweighed by the benefits of providing security assistance? What tools, information, and processes do policymakers need to effectively weigh the risk and identify when to engage?

5) Given the unique challenges of providing effective security assistance to fragile states—as well as the need to coordinate other U.S. programming to align with and support this mission—is a separate security assistance organization needed with the Department of Defense to focus on fragile states? If so, what structures, authorities, and personnel would it need to function effectively?

6) If security assistance is the most important means for the United States to engage fragile states for the purpose of winning the strategic competition with China, should the Department of Defense take over from State as the lead in the interagency process (as currently institutionalized by the Global Fragility Act) for developing and implementing U.S. programs in fragile states?

7) China and other autocratic states that provide financial and security assistance with no strings attached have a leg up on the United States in the competition for influence in fragile states. Is there anything the United States and other democracies can do to level the playing field?

Background Research - Paper 9

Gates Forum IV

U.S. Security Assistance and the Symphony of Power

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Executive Summary

Security assistance is a vital component of American statecraft. In an era of strategic competition where America's adversaries are increasingly aligned, the primary purpose of this assistance should be to strengthen deterrence against the People's Republic of China (PRC) and secondarily against Russia, and, if deterrence fails, to enable the United States to prevail in a conflict. This focus naturally highlights the importance of military readiness in the Indo-Pacific and Europe. It also includes using assistance to ensure that Allies and partners can resist PRC and Russian coercion short of war, and that the United States can maintain an advantage in terms of horizontal escalation should a conflict that begins in one region spread to others. A second priority is to use security assistance to buy down risk against other threats to enable the United States to focus on these peer and near-peer competitors.

This approach would more selectively focus on a smaller number of higher priority countries, and it would de-emphasize the types of capacity building efforts that predominated during the Global War on Terror (GWOT) and the use of security assistance to gain political influence, where there is little evidence of their effectiveness. The United States is better positioned than it was a half-decade ago to use these tools effectively, having directed more attention and resources toward the regions that matter most and begun the hard work of rethinking how to integrate and deploy assistance more effectively. However, there are enduring challenges that still need to be addressed and new efforts that need to be nurtured. These include overcoming bureaucratic barriers and defense industrial shortfalls that contribute to delays in arming frontline states in Europe and the Indo-Pacific.

While recognizing the salience of many of the hard-learned lessons from the GWOT, this paper argues that to use security assistance, including arms sales, effectively, the United States needs to focus on making the reforms necessary to get the right countries, the right stuff, more quickly, and in ways that support the United States defense industrial base. In short, we need to get our own house in order.

Getting our priorities right and using security assistance effectively will require the executive and legislative branches to work together to rethink priorities and execution. This includes identifying a clear vision for how to use security assistance and improving alignment across the different security assistance programs and increasing their integration with other instruments of statecraft to realize that vision. Because major reforms require policymakers' attention and political capital – two resources always in short supply – this identifies the major pain points and provides a roadmap for action, including both high-level recommendations and more granular ones.

Introduction

World War II is commonly considered the pinnacle of U.S. military performance. But the United States didn't win on its own, and its contributions to the war effort went beyond the lethality U.S. forces directly brought to bear. The U.S. role as the "Arsenal of Democracy" was critical to the war effort. [1] The Lend-Lease Act of 1941, which authorized the Roosevelt Administration to send platforms and munitions to the UK, Soviet Union, and other allies was arguably the birth of U.S. security assistance as we understand it today. After the United States entered the war, the U.S. defense industrial base (DIB) continued churning out defense articles for America's allies as well as U.S. forces.

After supporting the Allies against the Axis powers during World War II, the United States adapted security assistance to build the capacity of state and non-state anti-communist forces during the Cold War and later to work by-with-and-through local partners to counter violent extremist organizations during the Global War on Terror (GWOT). Today, the United States must once again adapt security assistance for an era of strategic competition.

Strategic competition has become an ordering principle for the post- post-9/11 world, but it remains poorly defined and can include everything from deterring great power conflict to competing for influence in the Global South. The elasticity of the concept may capture the complexity of the numerous challenges the United States faces, but it also creates conditions for strategic drift in how the U.S. government prioritizes resources and sequences activities. This is certainly true for security assistance.

There are two concepts to consider when seeking to optimize the use of security assistance: prioritization and effectiveness. Prioritization relates to where and for what purpose security assistance is employed. Effectiveness is about the mechanics of how to use assistance to achieve priorities. Many of the hard-learned lessons from the GWOT are an outgrowth of an era when the United States was working with weak and problematic partners and have to do with using security assistance more effectively: the importance of goal-alignment with a recipient and its absorption capacity, the need to invest in assessment, monitoring, and evaluation, and the role of conditionality, to name a few.

This paper argues that in an era of strategic competition, the primary purpose of security assistance should be to strengthen deterrence against the People's Republic of China (PRC) and secondarily against Russia, and, if deterrence fails, to enable the United States and its Allies and partners to prevail in a conflict. A second priority is to use security assistance to buy down risk against other threats to enable the United States to focus on these peer and near-peer competitors. While recognizing the salience of many of the hard-learned lessons from the

[1] Franklin D. Roosevelt, "Fireside Chat 16: On the Arsenal of Democracy," *Miller Center*, University of Virginia, December 29, 1940, https://millercenter.org/the-presidency/presidential-speeches/december-29-1940-fireside-chat-16-arsenal-democracy.

GWOT, this paper argues that to use security assistance effectively for this purpose, the United States needs for on making the reforms necessary to get the right countries, the right stuff, more quickly, and in ways that support the United States defense industrial base. Choosing this focus is not intended to discount other enduring challenges, such as dysfunction within partner political-military bureaucracies, and interest divergence between the United States and recipient countries. There are a lot of challenges facing the security assistance enterprise, but this paper argues that a foundational element of any reform effort must be to clarify our vision and get our own house in order.

Clarifying the Vision

The academic literature identifies two forms of deterrence – by denial and by punishment – both of which are relevant to today's challenges. Had Vladimir Putin recognized Ukraine's ability to deny him his objective at a reasonable cost, in large part because of the security assistance the West has provided, he may never have launched his full invasion in February 2022. Should a negotiated settlement occur, however, Ukraine likely will need a long-range strike capability that it can use to hold Russian targets at risk and thereby deter future aggression through the threat of punishment. A similar calculus exists in the Indo-Pacific, where Taiwan is seeking to become a "porcupine" able to resist an invasion by the People's Liberation Army, if not indefinitely then for sufficient time to enable a U.S.-led intervention. The aim is to persuade Xi Jinping that any conflict will be longer and more costly than he wants it to be. Xi also needs to believe that the United States can impose disproportionate costs on the PRC should it choose to intervene in a conflict. When considering deterrence, it is also important to factor in both the potential for vertical and horizontal escalation during a conflict and the existence of activities short of war – in the so-called gray zone – that adversaries use to coerce U.S. Allies and partners.

What does this mean in practice for security assistance? It's helpful to begin with the various objectives for which this assistance may be employed. These include building the capacity of partner forces, improving their professional conduct and standards, enhancing their interoperability with U.S. forces, securing access, basing, and overflight (ABO), and building relationships or increase influence in ways that advance U.S. foreign and defense policy objectives. Security assistance can also be used to advance Foreign Military Sales (FMS) and Direct Commercial Sales (DCS), which, in turn, can be used to achieve some of the same outcomes as security assistance. This paper addresses arms sales in both respects: as a tool that can be used in place of or in tandem with security assistance; and as an instrument that can be reliant on security assistance.

A focus on deterrence and military preparedness would emphasize building the capacity of frontline states in the Indo-Pacific and Europe to that are critical to deterring the PRC and Russia, enhancing their interoperability with U.S. forces to participate in a U.S.-led coalition should deterrence fail, and securing the ABO or other requirements that U.S. forces would need to prevail in a contingency against either of these adversaries. Capacity building,

interoperability, and access were key aspects of the GWOT as well, but they would look fundamentally different in this paradigm. Capacity building, for example, involved helping weak and unprofessional security forces defeat indigenous actors during the GWOT. This required significant emphasis on even basic tactical capabilities like how to zero a rifle and on human rights norms. Today and in the future, the aim is to help already capable partners like Taiwan or the Baltic states to become "porcupines" able to deter or repel foreign invaders. Arms sales will figure more prominently, both to build partner capacity and to strengthen the U.S. defense industrial base. Security assistance focused on the cyber, information operations, and lawfare domains also take on added resonance to deter adversaries that use measures short of war to coerce U.S. Allies and partners or to set conditions for a potential conflict. Outside the Indo-Pacific and Europe, the United States would use security assistance to ensure it has horizontal escalation dominance should a conflict occur and to buy-down risk against other threats that could distract from a focus on the PRC and Russia.

This focus would de-emphasize efforts to advance political outcomes – where there is little evidence that security assistance is effective on its own – and to compete with adversaries for influence in third-party countries. [Of note: one lesson I took away from my time as the Counter-PRC Influence Fund Coordinator, which is a position I held while serving in a senior leadership position in the State Department Office of Foreign Assistance, is that economic assistance is often more useful than security assistance when it comes to competition for influence.] This focus would also play down the use of security assistance to professionalize partner forces or at least alter the nature of "professionalization" given that many top priority countries will have more advanced militaries than did America's partners in the GWOT.

Even with a clear vision, there will be tradeoffs in where, why, and how security assistance is used. Adjudicating between tradeoffs is more art than science. The aim should not be to erase the need for such tradeoffs, but rather to maintain a guiding vision and to ensure that each option is optimized for success.

Integrating Assistance

Aligning security assistance – both military aid and civilian security sector assistance – with national security priorities and using it effectively requires better integrating the different types of assistance with one another and with other instruments of national power. Experts inside and outside the U.S. government have long recognized the need to improve coordination and integration. Congress has considered various legislative fixes, including one that I participated in as part of a renewed push to pass a State Authorization bill in 2019. The State Department's Office of Foreign Assistance also led a strategic review of security assistance during the Biden Administration that included a major focus on improving Foggy Bottom's coordination with Pentagon and on integrating assistance with other foreign policy tools. Stove-pipes still exist despite these efforts.

This paper posits that addressing many of the challenges that still exist need to be addressed internally by State and DoD – rather than bilaterally between them – with top-down guidance and coordination where necessary by the White House National Security Council (NSC) staff. State-DoD coordination certainly has a role, but the two departments already have mechanisms in place to coordinate their respective security assistance programs with one another. It's just that these mechanisms are not terribly effective. The answer is not to try to build a better mousetrap, but rather to address the underlying issues, many of which are endogenous to each department. The same goes for integrating assistance with other instruments of national power, which is something best addressed internally and through NSC-led coordination. Every NSC is organized differently, but success is most likely if a single directorate has the lead for syncing security assistance across the interagency and with other instruments of statecraft.

Looking Down-and-In: The State Department

Until recently major State Department security assistance and programs were executed by multiple bureaus across several different under-secretariats. This has added to the difficulty of developing and implementing a strategic approach to security assistance that aligns the different programs and improves their integration other foreign policy tools. The Trump Administration's proposed State Department reorganization would house these programs and the offices responsible for executing them within the Office of the Under-Secretary for Arms Control and International Security (whose undersecretary goes by the initial "T" in the Department's naming system). If executed effectively, this reorganization will enable T to orchestrate a more integrated approach to the use of security assistance. This would not only include better internal coordination across the various security assistance tools. It would also strengthen T's voice in the bureaucracy and in bilateral engagements with other countries.[2]

This consolidation also creates an opportunity to better align assistance with regional- and country-specific priorities and with other instruments of statecraft. In particular, the United States should enhance its use security assistance to deliver strategic messages to allies and partners on the one hand and adversaries on the other. For example, the Biden Administration made a practice of trying to tie assistance for Ukraine to a strategy for resolving the Ruso-Ukraine war. These decisions were often driven out of the White House. To make this practice the norm, strategic messaging needs to be integrated into assistance plans, understanding how to time, sequence, and announce aid delivery. The same goes for building on efforts to leverage security assistance to promote defense industrial cooperation with other countries, in addition to the more traditional practice of using it to advance arms sales.

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[2] Lowell Schwartz and Anthony Wier, "One Beneficial Idea in the Trump Administration's Plans for Reorganizing the State Department," *Emissary,* June 18, 2025, https://carnegieendowment.org/emissary/2025/06/state-department-t-international-security-arms-control-reorganization?lang=en.

Seizing the opportunity for better alignment with geographic priorities and other instruments of statecraft will require additional steps that extend beyond the remit of security assistance reform. The State Department needs an office and a process responsible for developing a new National Diplomacy Strategy (similar in ambition and scope to the National Defense Strategy) that would set priorities and parameters for the use of all instruments of statecraft, including security assistance. This would drive prioritization of resources, with Integrated Country Strategies remaining the vehicles for employing security assistance in concert with other tools.

The consolidation in T also provides an opportunity to augment the security assistance workforce (in contrast to the cuts occurring elsewhere in the Department). Presently, DoD has sufficiently greater human capital to identify requirements and implement assistance, relegating State to a junior partner. Foggy Bottom cannot execute FMF and FMS, instead relying on DoD, which can give the Pentagon de facto veto authority on various initiatives. It also cannot fully exercise its statutory role of providing oversight of DoD authorities because it does not have sufficient staff to review assistance packages. Because State theoretically pulls the levers on a larger number of instruments of power, this imbalance affects not only coordination across security assistance programs but also their integration with these other tools.

Looking Down-and-In: DoD

DoD provides security assistance under the broader umbrella of security cooperation, which includes other activities, such as joint exercises, training, and defense institution-building intended to achieve strategic objectives.[3] Various stakeholders across the DoD enterprise oversee different security assistance programs, and there is no centralized planning process to align them with one another or other defense-related operations, activities, and investments. The Office of the Deputy Assistance Secretary of Defense for Global Partnerships (GP) in the Office of the Under Secretary of Defense for Policy (OUSD-P) is billed at the focal point for security cooperation and assistance, but it only controls a small portion of the overall security assistance budget. In OUSD-P, the two main regional offices and the Office of the Assistant Secretary of Defense for Special Operations and Low Intensity Conflict each manage additional programs. The regional Combatant Commands compete for GP-controlled assistance and have their own pots of money.

It would be ideal if DoD housed all its security assistance programs under one office, but this is also unrealistic. DoD could achieve a similar outcome by creating a department-wide planning process led by a single integrator to enables better coordination across accounts and with other defense-related operations, activities, and investments. As at State, this would improve the

[3] Defense Security Cooperation Agency, *Security Assistance Management Manual (SAMM), Chapter 1: Introduction and Overview*, updated May 2024, https://samm.dsca.mil/chapter/chapter-1; "Fiscal Year (FY) 2025 President's Budget: Justification for Security Cooperation Program and Activity Funding," Department of Defense, March 2024,

ability to synchronize assistance with information operations. Critically, it could also help improve the alignment of DoD assistance with requirements identified in the Pentagon's operational plans for a contingency. These plans identify numerous requirements, including the ability to flow forces, platforms, and munitions, highlighting the importance of force posture and ABO. They also make assumptions about Allies and partners, including their willingness and ability to provide ABO, lend other forms of support, and, in some cases, fight alongside U.S. forces in a conflict.

As former Deputy Assistant Secretary of Defense Tommy Ross and I have argued before, DoD security assistance should be focused more narrowly on inherently military objectives. Presently, DoD uses assistance to develop the capabilities of recipient forces for self-defense and multinational operations, build relationships that promote specific United States security interests, and secure access, basing, and overflight (ABO) for U.S. forces during peacetime or a contingency operation.[4] These first two objectives have plenty of room for overlap with State's security assistance objectives. Where DoD is involved in long-term capacity building, it should play a supporting role to State Department-coordinated efforts (FMF is 7-year money, making it ideal for his purpose). Otherwise, it should pursue more narrowly tailored military objectives: improving U.S. posture and fulfilling other military requirements needed to prevail in a potential contingency; and responding to real-time developments (DoD assistance is not as heavily earmarked and often can be executed faster than FMF).[5]

Aligning Funding with Geographic Priorities

Over the last decade, policymakers have begun to rethink and realign security assistance to meet the demands of an era of strategic competition. Where the executive branch has had flexibility, it has sought to reorient resources to the Indo-Pacific and Eastern Europe. Under the Biden Administration, for example, the Department of Defense realigned the use of Section 333 assistance, which was heavily focused on building partner capacity for counterterrorism partners in Africa, the Middle East, South and Central Asia, to Indo-Pacific countries.[6] Congress, sometimes at the behest of the executive branch, has created new authorities and appropriations to rebalance the geographic focus of security assistance.

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[4] "Fiscal Year (FY) 2025 President's Budget: Justification for Security Cooperation Program and Activity Funding," Department of Defense, March 2024, https://comptroller.defense.gov/Portals/45/Documents/defbudget/FY2025/FY2025_Security_Cooperation_Justification_Book.pdf.

[5] This approach is derived from Stephen Tankel and Tommy Ross, "Retooling U.S. Security Sector Assistance," *War on the Rocks,* October 28, 2020, https://warontherocks.com/2020/10/reforming-u-s-security-sector-assistance-for-great-power-competition/.

[6] This reprioritization was driven by a top-down directive from the Under Secretary of Defense for Policy.

For the Indo-Pacific, Congress created the Southeast Asia Maritime Security Initiative in 2014 to improve the ability of Southeast and East Asian nations to address through multilateral efforts the growing People's Republic of China (PRC) assertiveness in the South China Sea. Later re-designated as the Indo-Pacific Maritime Security Initiative, this program continues to receive funding and is authorized through 2027.[7] Congress authorized the Pacific Deterrence Initiative in 2021 to enhance U.S. force posture, infrastructure, presence, and readiness, as well as strengthening the capabilities of U.S. allies and partners in the Indo-Pacific region.[8] Congress also appropriated $2 billion in FMF for Taiwan and other Indo-Pacific countries, authorized up to $1 billion in Presidential Drawdown Authority for Taiwan, created the Indo-Pacific Security Assistance Initiative authority, and appropriated $500 million for it to enhance regional deterrence by bolstering the military capacity and capability of Allies and partners and replenish U.S. military stockpiles that have been used to support some of these countries.[9]

Congress historically had been unwilling to provide much assistance funding through traditional grant methods for countries in Europe because even the least well-off are wealthier than typical recipients.[10] Even the European Deterrence Initiative, which had the potential to channel more assistance to frontline NATO Allies, dedicated most funds to posture and equipment pre-positioning, vice security assistance.[11] This changed following Russia's full invasion of Ukraine in February 2022. Since then, Congress has authorized and appropriated almost $132 billion in security assistance: $33.5 billion in Ukraine Security Assistance Initiative (USAI) funds; $60.9 billion for Presidential Drawdown Authority (PDA), which allows the transfer of DoD stocks to Ukraine and provides funds to DoD for replenishment; and almost $7

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[7] Aaron Mehta, "Carter Announces $425M In Pacific Partnership Funding," *Defense News,* May 30, 2015, https://www.defensenews.com/home/2015/05/30/carter-announces-425m-in-pacific-partnership-funding/

[8] DoD has requested and the 2025 NDAA authorized $9.9 billion for this effort. "Pacific Deterrence Initiative," Department of Defense Budget Fiscal Year (FY) 2025, March 2024.

[9] Caitlin Campbell, "Taiwan: Defense and Military Issues," Congressional Research Service, August 15, 2024, https://www.congress.gov/crs-product/IF12481.

[10] Max Bergmann, "To Help NATO Allies Get Off Russian Equipment, The United States Should Revive Defense Lending," *War On The Rocks*, February 14, 2018, https://warontherocks.com/2018/02/help-nato-allies-get-off-russian-equipment-united-states-revive-defense-lending/.

[11] It was also largely used to shift enduring costs for U.S. military presence in Europe into the Overseas Contingency Operations portion of the defense budget. "European Resistance Initiative: DoD Needs to Prioritize Posture Initiatives and Plan for and Report Their Future Cost," GAO Report, December 2017, https://www.gao.gov/assets/690/688849.pdf.

billion in FMF for Ukraine and other countries affected by the war.[12] While State allocated a sizeable portion of this FMF to Ukraine, it also used it to bolster frontline NATO allies, incentivize countries to donate from their stocks to Ukraine in exchange for replenishment funds from the United States; and to try to wean some countries off Russian-made systems.

It is important to put these trends in context. First, most of the USAI and FMF appropriated following Russia's full invasion of Ukraine came through supplemental appropriations and are not baked into the base budget. As such, the longevity of this assistance is not guaranteed.[13] The same is true for most new funding for Taiwan and other Indo-Pacific countries. Second, PDA was needed because existing security assistance mechanisms were not fit for purpose in a crisis, but it was never intended to be a long-term solution. Third, Congress continues to earmark a disproportionate share of base-budget FMF for the Middle East, in particular Israel, Egypt, and Jordan.[14]

While this paper advocates for a clear and consistent prioritization of those countries most critical to deterring the PRC and Russia, it does not argue for blindly throwing money at countries in Europe and the Indo-Pacific simply because they happen to reside in a high priority neighborhood. It is reasonable to expect recipients of security assistance, especially those with higher income levels like many of the countries in these regions, to shoulder most of the burden. The United States should be prepared to help them help themselves through targeted assistance, however, especially where that assistance can be a force multiplier for arms sales. It is reasonable to consider absorption capacity as well, especially for some Indo-Pacific countries, to avoid backlogs that rob other countries of resources they can use. Any realignment also must account for how the United States uses assistance to maintain horizontal escalation dominance and to buy-down risk against other threats. To address these and other factors, the United States government needs to conduct a zero-based review of all security assistance that considers these and other factors to allocate resources globally.

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[12] "Ukraine Oversight," Special Inspector General for Operation Atlantic Resolve, Promoting Whole of Government Oversight of the U.S. Ukraine Response, https://www.ukraineoversight.gov/Funding/Security-Assistance/

[13] USAI was included in congressional markups of the FY2026 National Defense Authorization Act, but it has not been authorized and funded at the time of writing.

[14] Congress authorized $6.1 billion FMF in FY 24, of which countries in the Middle East received $5.28 billion, with approximately $5 billion of that going to Israel, Egypt, and Jordan. The Trump Administration exempted Israel and Egypt from its FMF pause. On the FY 24 budget see, "Public Law No: 118-47," 118th Congress, https://www.congress.gov/bill/118th-congress/house-bill/2882/text; on the Trump Administration exemption see, "US orders halt to virtually all foreign aid except for Israel and Egypt," *The Guardian*, January 24, 2025, https://www.theguardian.com/us-news/2025/jan/24/foreign-aid-israel-egypt.

Aligning Security assistance with Allies' and Partners' Needs

Security assistance and arms sales are not geared to provide the capabilities that Allies and partners most need. On military assistance, many countries would benefit from so-called value arms, which are relatively low-cost and highly producible munitions; and innovative, commercially available technologies, including uncrewed systems, sensors, artificial intelligence to enable battlefield management, and additive manufacturing capabilities that could enable rapid production and sustainment. The United States is failing to provide these, instead offering more expensive munitions and conventional, legacy platforms. This is a function of a security cooperation system largely reliant on U.S. procurement priorities and of a bias against technology diffusion.

Defense companies only initiate production of capabilities that the military Services contract for, and DoD procurement has a strong bias in favor of existing programs of record. Industry sometimes continues to produce items for export even after the Services stop buying them, but the production of legacy items is at risk of termination if they get in the way of next generation capabilities. Because the Services don't invest much in value arms, defense companies don't build them. Likewise, innovative capabilities that the Services might want to buy are often not yet programs of record (called non-programs of record). DoD lacks a standardized method for procuring non-programs of record capabilities, much less transferring them to foreign partners. These shortcomings not only hamper our ability to provide Allies and partners what they need. They also threaten to undermine efforts to use security assistance and FMS to wean other countries off Russian-made systems and guard against PRC encroachment.

The U.S. government not only fails to provide the right capabilities in some cases. It also fails to provide capabilities quickly. This is partly due to production challenges (on which more below). It is also a function of a sclerotic FMS system and an overly restrictive export approach. FMS reform is beyond this paper's scope, but it is worth noting that the Biden Administration launched a major reform effort that continues under the Trump Administration. [15] On exportability, the U.S. approach is a vestige of an era when it was responsible for almost three-quarters of the money spent on defense research and

[15] See, for example, "Department of Defense Unveils Comprehensive Recommendations to Strengthen Foreign Military Sales," Depart of Defense News Release, June 13, 2023, https://www.defense.gov/News/Releases/Release/Article/3425963/department-of-defense-unveils-comprehensive-recommendations-to-strengthen-forei/; "FMS 2023: Retooling Foreign Military Sales for an Age of Strategic Competition," State Department Fact Sheet, May 18, 2023, https://2021-2025.state.gov/fms-2023-retooling-foreign-military-sales-for-an-age-of-strategic-competition/; "Reforming Foreign Defense Sales to Improve Speed and Accountability," White House Executive Order, April 9, 2025, https://www.whitehouse.gov/presidential-actions/2025/04/reforming-foreign-defense-sales-to-improve-speed-and-accountability/.

development and the diffusion of technology was far slower than it is today.[16] Its approach makes less sense in an era of rapid technological change driven by commercial innovation. The United States is essentially buying down less and less risk in terms of diffusing sensitive technologies, while taking on an increasing risk in terms of getting other countries the capabilities they need because the current approach hampers the export of innovative technologies and legacy systems.

More sophisticated platforms and munitions typically have a U.S.-only variant and then multiple other export variants built to certain specifications depending on the intended recipient. Defense companies do not build-in exportability up front, delaying the timeline to make defense items exportable and adding cost to the process. The Biden Administration took steps to begin addressing these challenges, including by working with Congress to authorize a cost-sharing arrangement that incorporates technology protection and exportability features in initial designs, thereby speeding the process for certain items.[17] The Trump Administration is placing even greater emphasis on accepting risk on technology transfers.[18] While these efforts are promising, getting the right things to the right countries quickly remains a challenge at the time of writing.

The PRC and Russia operate extensively in the so-called gray zone, meaning deterrence requires more than just military aid. Other countries need, and often request, more help in areas such as the cyber domain and information operations. The U.S. security assistance architecture is still not equipped to provide these capabilities needed to deter adversary activities short of war. The State Department dismantled its office dedicated to countering disinformation and USAID, which also provided assistance in this area, no longer exists. While the combatant commands conduct Military Information Support Operations (MISO) and can do these operations in support of foreign countries as a form of security cooperation, MISO is not security assistance. As such, U.S. assistance in this area is anemic.

DoD and State both provide security assistance in the cyber domain, with State assistance going to both military and law enforcement partners. USAID also provided assistance until it was closed. Much of funding for this assistance is embedded within broader security assistance (and sometimes economic assistance) accounts. This can lead to cyber-specific objectives being overshadowed. It also means that the right authorities do not always align with the right stakeholder within the recipient country. The relative newness of the cyber offices at State and DoD combined with the complexity of the cyber domain can exacerbate this dynamic.

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[16] Marcy Gallo, "The Global Research and Development Landscape and Implications for the Department of Defense" Congressional Research Service, June 28, 2021, https://www.congress.gov/crs-product/R45403.

[17] "10 U.S. Code § 4067 - Technology protection features activities," Legal Information Institute, Cornell University Law School, https://www.law.cornell.edu/uscode/text/10/4067.

[18] "Reforming Foreign Defense Sales to Improve Speed and Accountability."

Moreover, where cyber assistance is provided, it is heavily focused on capacity building, vice active support to help conduct or counter cyber operations.

Energizing the DIB

The United States has only episodically leveraged the demand from foreign partners for security assistance and arms sales to bolster the U.S. DIB. The surge in security assistance to Ukraine beginning in 2022 led to almost $70 billion in investments in U.S. defense industry. PDA transfers fueled demand for newer, more modern equipment to replenish U.S stocks. As analysts observed, this created a "once-in-a-generation opportunity" to address long-standing weaknesses in the DIB.[19] Looking beyond security assistance to arms sales, the U.S. government executed $116 billion in FMS cases in fiscal year 2024, which was approximately two-thirds of DoD's procurement budget. The State Department adjudicated licenses worth an additional $157 billion that year. Again, all money that flowed into the DIB.

Arms sales have sustained the production capacity for programs of record on numerous occasions. For example, after RTX shuttered the SM-2 line in 2014 because of declining U.S. demand, it reopened the line five years later in response to foreign demand. This proved to be quite opportune, as production lines were already spinning when U.S. demand for SM-2's surged following Navy deployments to combat the Houthis in the Red Sea.

Because of the challenges involved in selling non-programs of record, as described above, arms sales rarely set conditions for producing capabilities that the Services have not procured. However, history shows it is possible to see the value that arms sales could have in creating production lines for capabilities the U.S. is not procuring but might need in the future. From 1938 to 1941, Allied demand fueled the creation of production lines that the U.S. subsequently relied on to equip its own forces in World War II. If the U.S. government created conditions today that enabled and incentivized industry to design systems based on foreign requirements, this could fuel production for "good enough" platforms and munitions that could be critical in the future if the military burned through its stocks in a protracted conflict.

While the United States has long used security assistance advance arms sales, the challenges facing the DIB require it to more vigorously pursue defense industrial cooperation with Allies and partners as well. U.S. industry is already pursuing co-development, co-production, licensed production, and co-sustainment efforts. The Biden Administration developed guidance to expand and accelerate these efforts in an intentional manner, prioritizing projects that filled a gap in the U.S. DIB, helped to solve operational problems for the Joint Force, or helped an Ally or partner to develop its industrial base in ways that enhance deterrence or enable it to

[19] Elizabeth Hoffman, Audrey Aldisert, Cynthia R. Cook, Gregory Sanders, and Shivani Vakharia, "How Supporting Ukraine Is Revitalizing the U.S. Defense Industrial Base," Center for Strategic and International Studies, April 18, 2024, https://www.csis.org/analysis/how-supporting-ukraine-revitalizing-us-defense-industrial-base.

contribute to U.S. readiness. Security assistance can support these efforts. For example, the Biden team used FMF to support the establishment of a Finnish TNT factory in exchange for front of the line access once TNT was in production. FMF is historically used to enable purchases from U.S. companies, but this more novel approach supported a new NATO Ally and addressed an acute TNT shortage in the United States. It is also easy to envision how defense institution building could be adapted to advance defense industrial cooperation.

Conclusion

The United States is better positioned than it was a half-decade ago to use security assistance effectively, having directed more attention and resources toward the regions that matter most and begun the hard work of rethinking how to integrate and deploy assistance more effectively. However, there are challenges that still need to be addressed if the United States is going to get the right things to the right countries quickly, and in a way that optimally aligns the use of security assistance with other instruments of statecraft and energizes the DIB.

Recommendations: An Agenda for Action

Because major reforms require policymakers' attention and political capital – two resources always in short supply – it is helpful to have an action agenda.

1. The United States needs an interagency strategy for security assistance, which Congress could mandate the Executive Branch produce. This paper recommends centering that strategy on deterrence and readiness, but that vision should be interrogated to see if it holds up. The important thing is to have one and to use it to develop a strategy with a realistic set of priorities for what security assistance will be used to achieve and how to ensure it is used effectively in concert with other instruments of statecraft.

2. Based on a clear vision for security assistance, the U.S. Government should conduct a zero-based review to bring resources in line with established priorities for where and how best to use it. Congress could direct State and DoD to conduct this review, authorize and appropriate resources for an independent think tank or research center to do it, or stand up its own advisory group with outside experts. Any such review should ruthlessly prioritize recipients based on some combination of the following:
    a. The potential risk they face of aggression by the PRC, and secondarily by Russia;
    b. The likelihood they will join a U.S.-led coalition in a contingency with the PRC or Russia, and secondarily with Iran or the DPRK;
    c. Their ability to practice self-help through indigenous defense production or the purchase of arms;
    d. The usefulness of security assistance to enable them to develop a capability they need to deter aggression and could not develop otherwise;
    e. Their importance in terms of priority ABO or fulfill other operational requirements for the Joint Force, and the likelihood that security assistance will lead them to meet these needs;
    f. The value of security assistance to facilitating U.S. arms sales or otherwise boosting the U.S. defense industrial base, including through defense industrial cooperation;
    g. Their value to the U.S. ability to maintain horizontal escalation dominance outside the main theater of conflict should one occur;
    h. Their value to the U.S in terms of buying down risk from other threats; and
    i. The ramifications of curtailing major assistance packages that they have grown accustomed to receiving.

3. State and DoD should clarify their functional objectives for security assistance and develop coordinated, department-wide planning processes that rationalize their various security assistance programs internally, develop data-informed rubrics to guide decision-making about where to expend resources, and ensure sufficient mechanisms exist to integrate assistance with other instruments. Concurrently, the NSC should develop guidance to drive joint security assistance planning at the strategic level to augment mechanisms at the working level. Congress can encourage this through legislative directives and oversight.

4. The Trump Administration's reorganization of the State Department creates an opportunity to strengthen the security assistance workforce so that Foggy Bottom can execute all the authorities under its control and carry outs its concurrence responsibilities regarding Title 10 military assistance. The Executive Branch should request, and Congress should appropriate funds to seize this opportunity.

5. Congress should authorize the creation of a PDA stockpile – separate from U.S. stocks – to speed-up the provision of key platforms and munitions to security assistance recipients without taxing U.S. readiness. This stockpile could be funded with initial seed money appropriated by Congress, with replenishment financed through a blend of future appropriations and a portion of FMS proceeds. In addition to delivering items more quickly, this stockpile would create a consistent production demand for the DIB.

6. To overcome FMS reliance on the Services' traditional procurement pathways and some of the challenges related to exportability and tech disclosures, Congress should modify and expand the Special Defense Acquisition Fund (SDAF), which acts as a pre-purchase program for foreign military sales, or create a new dedicated FMS account that enables DoD to contract for priority platforms and munitions in high demand by Allies and partners that are non-programs of record. To avoid the potential for spending more than the U.S. sells, Congress could appropriate approximately half of the amount that State and DoD assess they will sell over the lifetime of the funds, with a modified SDAF or new account also authorized to accept funds from foreign governments to be used at the direction of the Secretary of Defense.

7. Congress should consider making changes to Title 22 security assistance authorities. For FMF, Congress should remove the need to secure an offshore procurement waiver where State is using FMF to support defense industrial cooperation to fill gaps in the U.S. DIB. Congress should also consider modifying existing Title 22 authorities or creating a new one to build capacity and support activities in areas such as cyber and disinformation, which do not fall squarely in either the military or law enforcement domains.

8. To accelerate tech disclosure in keeping with the Trump Administration's EO, the executive branch should consider creating an expedited technology transfer review process for defense exports. One tier should categorize partners based on the level of confidence in them to protect sensitive technologies. The second should categorize systems based on the level of sensitive of their technology. A third tier should categorize systems based on the value that the U.S. ascribes to proliferating them to advance burden sharing by Allies and partners. This would enable the United States to pre-approve certain countries and pre-clear certain technologies for export, noting that in some cases a country may be pre-approved for some technologies but not others. Before launching, it will be important to ensure that this review process can be implemented in a way the ensures fast-tracks approvals by overcoming bottlenecks in

the existing system and does not become just another layer of bureaucracy on top of that system.

Questions for Discussion

1. Is security assistance still a vitally relevant instrument if it is being directed toward more highly capable partners able to build their capacity through arms purchases? Should the United States be shrinking the budget envelope and spending that money on other instruments of national power or using security assistance more to hedge against risk in non-priority theaters?

2. Considering the heavy bureaucratic lifts needed to reprioritize assistance and use it more effectively, is it worth it? Or should policymakers be focused on fixing the arms sales and defense industrial cooperation processes if they must choose among broken systems?

3. Does trying to integrate security assistance with other instruments of national power risk skewing the priorities for which it is used, i.e. is there a danger that decisionmakers focus more on where they can create synergies than on where assistance is most needed?

4. If U.S. finds itself running short of positive incentives and influence with other countries, should it consider throwing security assistance at this problem even if the gains are marginal, especially if the recipients are “swing states” in the competition for influence with the PRC?

5. Recognizing that every tradeoff is unique, is there a theory of the case that should inform weighing high priority / less effective projects against lower priority / more effective ones?