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The Alignment Atlas

An analysis of influence campaigns across the globe

EDITOR'S NOTE

Arctic Ledger strives to provide quality and comprehensive understandings of the complexities of geopolitics in a way that can be both concise and/or exhaustive. As such, this issue of Arctic Ledger contains a brief written piece from Dr. Sohail Mahmood of Chapel Hill, as well as an in-depth analysis by Emma Loeber from the Josef Korbel School of Global and Public Affairs. This issue seeks to blend such analyses while also following a throughline of the alignment of the world as it leans towards or away centers of power. Volume I No. 4 is the result of the hard work of our authors, editorial team, and peer-review board, and I appreciate them all deeply.

We hope you enjoy.

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ABOUT ARCTIC LEDGER

Arctic Ledger is an independent research journal covering critical minerals, supply chain security, Arctic and maritime governance, and great power competition. It publishes original analysis from researchers, graduate students, and practitioners working across these fields, with contributors drawn from institutions worldwide. Arctic Ledger accepts no state or corporate funding.

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Papers have been reviewed by peers from the U.S. Naval War College, University of California, San Diego School of Global Policy and Strategy, affiliates close to the White House, House of Commons and the Select Committee on the CCP, strategists of NUPI and editors of The Arctic Institute to ensure quality of content, credibility of sourcing, and soundness of argument.

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Military-Civil Fusion in Mineral Extraction

By Mengmeng (Ivy) Wu

China's Military-Civil Fusion (MCF) strategy aims to integrate civilian economic, technological, and industrial resources with national defence development.[1] Its institutional mechanism combines central-party-state coordination with military-industrial enterprises, universities, research institutes, and civilian firms.[2] Governmental policy documents emphasise breaking institutional barriers between military and civilian sectors, and encouraging civilian technologies and enterprises to contribute to defence capabilities. [3] This institutional framework extends beyond conventional weapons production to strategic industries that provide critical inputs for military technologies.

Mineral extraction is one such domain. MCF becomes significant because strategically important mineral resources can be embedded within state-owned industrial groups, defence-related research networks, and downstream manufacturing systems. Rare earths provide the clearest example: the extraction and separation produce materials used in permanent magnets, sensors, motors, aerospace systems, and other technologies with defence applications.[4] China has sought greater state coordination over the sector, as shown in its 2024 Rare Earth Management Regulation, according to which the government determines which enterprises can conduct mining and separation.[5]

The Bayan Obo-Baotou rare-earth complex, for example, illustrates the connection between mineral extraction from a commercial perspective and strategic industrial development in terms of national defence.[6] Bayan Ob became the foundation of China's major rare-earth production centre in Baotou alongside the construction of a state-owned heavy-industrial base. Research on this region shows that its development was closely connected to national strategic and defence-industrial priorities, while Baotou Steel became an important state-owned platform linking mineral extraction with processing and industrial production.[7] The resulting mechanism integrates extraction, beneficiation, separation, and downstream materials, rather than treating rare earth as an isolated mining commodity.

This civil-military connection also extends beyond the mine. China Rare Earth Group, a centrally administered state-owned enterprise created through consolidation of major rare-earth assets, now spans mining, separation, deep processing, functional materials, and downstream applications.[8] In 2024, the Group signed a strategic cooperation agreement and developed projects involving rare-earth permanent magnets with China Electronics Corporation (a major defence-electronics enterprise).[9] China Electronics Technology Corporation's Ninth Research Institute, meanwhile, develops rare-earth permanent magnet materials for aerospace and national-defence applications.[10]

The significance of China's MCF in mineral extraction, therefore, lies in integration across the production chain. Extraction and processing provide the material base. State-owned industrial groups provide organisational capacity. Defence-linked enterprises provide downstream demand and technological applications. Minerals can thus become an upstream component of China's broader defence-industrial system without requiring the extraction sector itself to be formally military-controlled.

How Trump Has Drastically Diverged From US Arctic Policy and Where to Go From Here

By Emma Loeber

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Introduction

Many were shocked in January when US President Donald Trump made statements about his plans to take control of Greenland, upsetting alliances and bringing Arctic security to the geopolitical forefront. It seemed like a significant divergence from previous US actions in the Arctic and its stated goals of cooperation. But are Trump's attempts to control Greenland actually a divergence from official US Arctic strategy? Are they at odds with the stated goals of some departments of the US government? The official Arctic strategies published by each of the Arctic states and by several departments within them are important messaging tools and guidelines for Arctic policy. Seven departments of the US- The White House, the Department of Defense, the Coast Guard, the Navy, the Army, the Air Force, and Department of Homeland Security- have published sixteen Arctic strategies between 2009 and 2024, and almost every single one of them listed its goals in four key areas: security, resources, cooperation, and research. But their goals were not all the same, or consistent over time. This article examines the inconsistencies in those strategies to determine that US Arctic strategies prioritize either security and resources or cooperation and research. It also finds that the region was a low priority for the US prior to the Trump administration, at which point there was a shift in strategy in which the Arctic was elevated as a priority but cooperation and research were not only neglected but were actively discouraged, while security and resources became the sole considerations. The primary recommendation is that moving forward the US should balance all four aspects of Arctic policy while continuing to make the Arctic a higher priority.

Background- The United States in the Arctic

The United States (US) officially became an Arctic state in 1867 with the purchase of Alaska, one third of which sits above the Arctic circle at a latitude of approximately 66.5 degrees north. It is joined by fellow Arctic states Canada, Denmark (through its territory Greenland), Finland, Iceland, Norway, Russia, and Sweden. Together, these states formed the Arctic Council, an intergovernmental forum for regional cooperation, in 1996. The Council has since served as the primary venue for cooperation between the states on scientific research, search and rescue (SAR), maritime management, and conservation. Discussions and cooperation on military and security matters relating to the Arctic primarily take place in the United Nations (UN) or NATO (North Atlantic Treaty Organization), although Russia is not a member of the latter.

Geopolitically, the Arctic has been considered a 'zone of peace' in which armed conflict has not occurred since World War II, and a rare example of cooperation between Russia and the US through scientific research agreements (Heininen et al. 2025). However, since the 2010s, climate change has caused an increase in both temperature and tensions in the region. The potential economic and political value of the Arctic in terms of trade routes through the Northern Sea Route (NSR), oil and

gas reserves, and critical minerals, is not a new discovery. What has changed is that it is now becoming feasible to access those resources because of higher temperatures and melting ice. It is now estimated that the Arctic Ocean could be navigable by non-icebreaking ships as soon as 2030 (Kim et al. 2023). That could mean global access to a trade route with the potential to replace the Suez and Panama Canals for many journeys (Weir 2024; Liu and Kronbak 2010), and a battle over territorial lines and resource extraction rights for the Arctic states. Already there is increasing division between and within the Arctic states over whether to prioritize mitigating climate change or reaping the benefits of a warming Arctic. Russia has spearheaded the latter position, while the Nordic countries have led the former. The US has changed its position through different administrations, with a tendency by Republicans to prioritize pursuing resource extraction and by Democrats to advocate for climate change mitigation. However, no administration completely dismissed the effort of researching the effects of global warming in the Arctic in pursuit of resources, although that changed with President Donald Trump.

Like all Arctic states since at least the 2010s, the US government has published several official strategies for the Arctic region outlining the country's priorities in the region. These have come from various federal agencies and departments: the White House, the Department of Defense, the Department of Homeland Security, the Navy, the Coast Guard, the Air Force, and the Army. Sixteen were published between 2009 and 2024, under the administrations of George W. Bush, Barack Obama, Donald Trump, and Joe Biden. Each strategy differs slightly in its scope according to the specific responsibilities of its agency, but they have in common that they all addressed the US's goals in four categories: security, resources, cooperation, and research. These keywords typically had their own sections or subsections and were listed in priority areas, key goals, pillars, or similar lists in the recommendations of the strategies.

Analyzing the strategies for what they considered to be the most important priorities in each of those categories reveals two important trends: first, comparing strategies published close together under the same administration but from different agencies shows a lack of coordination and communication that has led to an inconsistent position on whether to prioritize cooperation and research or security and resources; second, comparing those published under President Trump to those under other administrations shows a notable shift by both elevating the Arctic as a geopolitical priority and firmly choosing the security and resources path while ignoring the impacts of discontinuing efforts at cooperation and research.

Each of the sixteen US Arctic policy strategies has varied in its format, length, and scope, but they all had the goal of listing the policy priorities in the Arctic for both the agency and the US in general. A trend emerges in the strategies that divide the four pillars into two sections that are often in competition: each strategy prioritizes either security and resources or cooperation and research. With the exception of the Trump administration they do include goals in all four categories, but place a higher value on one group or the other. This is the result of the aforementioned dynamic that is currently playing out in each of the Arctic states- the debate on whether to prioritize pursuing climate change mitigation to protect the region or to take advantage of its resources and increasing accessibility as soon as possible. A divide clearly exists, but given the tensions between countries prioritizing the latter, especially the Nordic countries, and the other Arctic states that are either on

the former side or somewhere in between, like the US, it is risky to fully commit to one side. Table 1 lists each of the 16 strategies, the administration it was published under, and whether it prioritized cooperation/research or security/resources, demonstrating that it has not been consistent.

Table 1: Strategies and Their Side of Arctic Politics

Strategy Department and Year	Presidential Administration	Side (Cooperation/Research or Security/Resources)
White House (2009)	George W. Bush	Cooperation/Research
Navy (2009)	Barack Obama	Security/Resources
White House (2013)	Barack Obama	Cooperation/Research
Coast Guard (2013)	Barack Obama	Cooperation/Research
Department of Defense (2013)	Barack Obama	Cooperation/Research
Navy (2014)	Barack Obama	Cooperation/Research
Department of Defense (2016)	Barack Obama	Security/Resources
Navy (2019)	Donald Trump	Security/Resources
Coast Guard (2019)	Donald Trump	Security/Resources
Department of Defense (2019)	Donald Trump	Security/Resources
Air Force (2020)	Donald Trump	Security/Resources
Navy (2021)	Donald Trump	Security/Resources
Department of Homeland Security (2021)	Donald Trump	Security/Resources
Army (2021)	Donald Trump	Security/Resources
White House (2022)	Joe Biden	Cooperation/Research
Department of Defense (2024)	Joe Biden	Cooperation/Research

As the table shows, during the Obama administration some strategies prioritized cooperation/research while others prioritized security/resources. The 2013 strategy published by the White House during the administration included three primary ‘lines of effort’: advance US security interests, pursue responsible Arctic region stewardship (focused on environmental protection and research), and strengthen international cooperation. Resources are not listed, and while there is a security section it is primarily about cooperation and domain awareness. Unlike security focused strategies, Russia and China are not even mentioned. Instead, it accepts that “The Arctic region is peaceful, stable, and free of conflict,” and does not perceive that to be in jeopardy. Yet, three years later in 2016 the Department of Defense under Obama published a strategy heavily focused on security and specifically on the threat posed by Russia. It went so far as to say that Russia’s actions have led the US to a “recommitment to deterrence and to build capability to defeat aggression

against the United States and its allies in the Arctic," (10). It diverged from not only the White House's stance on the Arctic as peaceful and a low security priority but from other Obama administration strategies as well, including the 2013 Coast Guard strategy, the 2014 Navy strategy, and even its own 2013 Department of Defense strategy.

While there have been discrepancies within administrations over whether to prioritize security/resources or cooperation/research, even those strategies with a heavy bias towards one dimension addressed the other and acknowledged that it was at least an aspect of Arctic politics that the US needed to be aware of, sometimes even including minor goals or a subsection. Appendix A provides brief descriptions of each of the strategies' stances in the four pillars.

The 2022 White House strategy published under the Biden administration followed up several strategies published under the first Trump administration that completely ignored the pillars of research and cooperation in favor of security and resources, and so the White House strategy focused heavily on the former in an effort to counteract the perceived damage. Despite this, it followed the pre-Trump tradition of not entirely dismissing any of the pillars, including security and resources. In fact, it named its first pillar 'Security: Develop Capabilities for Expanded Arctic Activity', and included a goal of increasing military training exercises and maritime presence in the Arctic, although it focused heavily on cooperation both within that section and in its fourth pillar on international cooperation. The 2024 Department of Defense strategy published under Biden also emphasized cooperation/research but did include short sections addressing the potential threats posed by Russia and China's increasing involvement in the Arctic, although it did not explicitly label them as threats or list out related goals, instead saying that the development "illuminates the potential for future improved readiness and combat expertise in the Arctic," (4). This addresses security without making it a main focus. Regarding resources, it only slightly addressed them by acknowledging that the Arctic is resource rich but recommending that in the case of the US Alaska natives be consulted on managing them without overexploiting them. However, the actual actions taken by Biden regarding resources in Alaska reflect a more complicated balance involving trying to pacify advocates for both environmental protections and resource extraction, which in reality left both parties dissatisfied, a perfect example of the US government's unclear and often competing priorities in the region.

In March 2023 Biden approved the Willow Project, which allowed the ConocoPhillips Company to access more of the National Petroleum Reserve–Alaska (NPR–A) in order to drill 199 new oil wells there, in Northern Alaska in the heart of the American Arctic. It alarmed environmental activists because of the importance of the region to the Arctic ecosystem, especially for caribou, polar bears, migratory birds, Arctic foxes, and other endangered animals, as well as to local indigenous communities. The project would also "exacerbate the climate crisis by emitting ~260 million metric tons of greenhouse gases over its 30-year lifetime," (Pai and Hall 2025). Later, in September 2024,

Biden introduced new regulations that, while they would have no impact on the area designated for the Willow Project, would protect other parts of the Alaskan Arctic from oil drilling. The regulations "Completely prohibit new oil and gas leasing for 10.6 million acres of Special Area lands, which is more than 40% of the NPR-A," (Pai and Hall 2025). It frustrated the oil and gas industry, and yet it was too little too late for environmentalists who could not understand why Biden would open part of the Arctic to drilling and protect other parts of it. In the context of the US's history of broader Arctic policy, however, it reflects the pattern of tenuous balancing between protecting and exploiting the region, which has more accurately resulted in an inconsistent and confusing doctrine that ultimately prioritizes nothing.

Trump's Divergence

Donald Trump took the opposite approach of every past administration with a designated Arctic policy. He completely disregarded research and cooperation in the Arctic, including climate change mitigation efforts or conservation. He chose security and resources and threw everything else out the window, not bothering to try and pacify advocates of the other pillars or include minor goals for them. He committed the US to the side of taking advantage of the Arctic's resources as soon as possible, and continued his broader foreign and US policy agenda of seeking out resources, disregarding any implications for alliances, and shutting down research efforts in various areas. The Arctic therefore became a high priority for him, but only in terms of resource extraction and potential military utility.

As an example, in his second term, he made every effort to undo the protections that Biden had placed on parts of the NPR-A in the Alaskan Arctic against drilling. This included cancelling the protection of Teshekpuk Lake, which is the largest lake in the Alaskan Arctic, a vital habitat for caribou, and an important resource for the traditional subsistence purposes of the Inupiat community in the nearby town of Nuiqsut, which has sued the Trump administration over the rollback of protections (Rosen 2026). In November 2025 Trump also removed the protections that Biden had placed on 10.6 million acres, or 40%, of the NPR-A, opening them up to oil drilling (Groom 2025) despite concerns from environmentalists and local indigenous communities.

These actions are, however problematic, consistent with Trump's official Arctic strategies. Unlike previous administrations, he barely mentions environmental protections and does not mention native rights. Instead, he focuses entirely on security and resource extraction. The rollbacks of Arctic environmental protections and opening of the NPR-A for oil drilling comes after the Army Arctic strategy, 'Regaining Arctic Dominance', published under Trump in 2021, which summarized the environmental changes to the region with a distinct focus on resources: "The region north of the Arctic Circle is warming twice as fast as the rest of the world, opening up new opportunities for natural resource extraction, shipping routes, and commercial fishing," (3). Every strategy published

under Trump also included a section describing just how vast the resources in the region are. The 2021 Army document went into great detail:

> According to most estimates, the Arctic is home to 13% of the world's oil, or 90 billion barrels, as well as 30% of the world's natural gas, an estimated 47 trillion cubic meters. Additionally, the Arctic has vast deposits of base metals (aluminum, copper, iron, nickel and tin), precious metals (gold, platinum, and silver), precious stones (diamonds), other minerals (apatite, graphite, and gypsum) as well as uranium. Perhaps most importantly to digital societies around the world, the Arctic is also a source of rare earth metals (dysprosium, neodymium, and praseodymium). These metals allow the miniaturization of components for aircraft engines and advanced weapons as well as televisions, smart phones, laptops, cars, and cancer treatment drugs. (16)

Conversely, the strategy only mentioned research done by the US in the context of simulating the Arctic operating environment for training. This was despite acknowledging that the environment is changing and affecting the infrastructure of US military buildings in the region, after which the strategy focused instead on the advantages to resource extraction, trade routes, and a warmer operating environment. It placed Trump firmly on the side of taking advantage of the impacts of climate change in the Arctic rather than trying to mitigate it, a stance shared by Russia. In fact, the strategy goes into great detail of how well Russia has been able to capitalize on increasing access to oil and gas reserves. In what is seemingly an effort to catch up to Russia in resource extraction, in his second term Trump has not only opened up the region for more oil drilling in the NPR-A but has also gutted US scientific research in the Arctic and any research on climate change. This has also harmed security because it led to an increasing lack of domain awareness as many scientific tools were dual use, and also served the military by allowing them to monitor operating conditions.

In May 2025, as a result of funding cuts under the Department of Government Efficiency (DOGE), the National Snow and Ice Data Center (NSIDC) announced that it would no longer update the majority of its Arctic sea ice monitoring programs (National Snow and Ice Data Center 2025), which are vital for climate change research and how the Arctic is being affected by rising temperatures. It is also an important tool for monitoring the accessibility of the Northern Sea Route (NSR), despite the fact that all of Trump's strategies discuss it as a high priority. Later, in September 2025, the Arctic Research Consortium of the United States (ARCUS) shut down as a result of losing almost all of its funding (Hansen 2025). It was the main forum for communication and collaboration between scientists and policy makers focused on the Arctic.

Research was not the only pillar to be demonized by Trump. Cooperation has likewise been not only neglected, but actively discouraged. That is the key difference between past administrations focusing on one side of Arctic policy while sidelineing but not completely eliminating the others, and Trump, who has taken significant and dangerous actions to work against the research/cooperation side.

In Trump's 2021 Navy Arctic strategy there was a small section on cooperation, but it focused entirely on how the US's allies need to start burden sharing. This was an ironic assertion considering that it is the Nordic countries that make up the bulk of NATO's Arctic capabilities, while the US has

long neglected and remained uncertain over the region. The US relies entirely on Finland for its icebreakers, of which the US only has three to Finland's ten, Russia's 40, and China's five (Murray 2026). The Nordic countries are also significantly more adapted to cold weather operations, with a long history of Arctic military operations. The US has struggled with adapting its equipment, particularly clothing, radios, and vehicles, to the extreme cold, while the other Arctic nations have naturally developed in those conditions (Rosen 2026). This was extremely apparent during the NATO military exercise Joint Viking held in March 2025 in the Norwegian Arctic. Following the exercise, a widely spread story based off of a UK newspaper article reported that during the wargame the US soldiers performed so poorly due to the conditions that the Finnish troops, playing the role of the opposition, were asked to go easy on them, although Finland has since denied this (Altman 2026). Regardless of the specifics, however, the US Marine Corps confirmed that for the majority of the US troops it was their first time operating in extreme cold weather conditions and that prior to the official exercise they received training from Norway on operating in the Arctic, including "extensive cold-weather survival training", "an ice breakthrough drill", and a "week-long snowmobile course," (Mazzamuto 2025). U.S. Marine Corps Second Lieutenant Grace Toll, who participated in the exercise, said that "Being able to work with allied nations like we are here in Norway gives us the opportunity to improve skills we wouldn't normally get to practice back in the U.S… At the same time, it strengthens our ties and interoperability for whatever comes in the future," (Mazzamuto 2025). International cooperation is clearly an important part of Arctic policy, especially for the US as it adapts to the increasingly relevant but unfamiliar operating environment. But Trump is putting that in jeopardy.

Less than a year after Joint Viking 2025, in January 2026, President Trump demanded that the US take control of Greenland, claiming that NATO could not defend the Arctic without the US's power there. He posted to X on January 14th;

> The United States needs Greenland for the purpose of National Security. It is vital for the Golden Dome that we are building. NATO should be leading the way for us to get it. IF WE DON'T, RUSSIA OR CHINA WILL, AND THAT IS NOT GOING TO HAPPEN! Militarily, without the vast power of the United States, much of which I built during my first term, and am now bringing to a new and even higher level, NATO would not be an effective force or deterrent - Not even close! They know that, and so do I. NATO becomes far more formidable and effective with Greenland in the hands of the UNITED STATES. (The White House [@WhiteHouse] 2026)

His claims that Russia and China are urgent threats to the US in the Arctic but that cooperation with the other Arctic states is a burden to the US falls in line with the strategies published under his administration, as described in the Navy 2021 strategy above. While earlier administrations struggled with neglecting Arctic policy and being unable to determine a succinct strategy for it due to its low priority, Trump has essentially the opposite problem. He has elevated its priority and committed to a strategy, but has done so without considering the impacts of neglecting research and cooperation. And not only for those areas- security is particularly at risk when cooperation is ignored, as demonstrated by the fact that the US relies heavily on its Arctic allies for cold weather training, icebreakers, and troops already capable of operating in the Arctic and in the European

theater near Russia. Trump has argued that those allies are not doing their part, and that the US needs control of Greenland because it is geopolitically important and the US is best able to defend it. Aside from the clear demonstration that the US is not actually best equipped to defend the Arctic, there are several reasons why the US is actually the party not equally contributing to the burden sharing of Arctic security that it claims to want.

The US has had the right to build and operate military bases on Greenland since 1951 under the Defense of Greenland Agreement between the US and Denmark, of which Greenland is a territory. At one point, the US operated over 20 military installations there, including Camp Century, which housed underground tunnels and a nuclear reactor, Thule Air Base, and Bluie West Seven, which protected the world's only cryolite mine, among others. Now, with the exception of Thule Air Base, now called Pituffik Space Base, all of the former US military installations have been abandoned. And even Pituffik is in disrepair due to melting permafrost and is sparsely manned with only 150 personnel. The creation of these bases by the US started during World War II when Denmark originally granted it permission, without consulting the indigenous community in Greenland. In some cases, including for Thule Air Base, local indigenous communities were forcibly relocated in order to build them (Holle 2019). And they have not been able to return to their homes because even the abandoned bases remained after they were shut down and the US refused to pay for their removal, although in 2018 Denmark finally agreed to fund a partial cleanup (Ellekrog 2024). This was partially due to the environmental hazards caused by materials left behind at the bases.

Clearly, the US does not have a history of treating Greenland well. Donald Trump has criticized the territory and Denmark's handling of its defense, telling reporters that "Basically, their defense is two dog sleds," (Wehner 2026), while at the same time the US has hailed Greenland as critical to its defense strategy while letting its bases decay. If Trump had prioritized cooperation as a part of his Arctic policy it would have been more likely that, rather than antagonizing Greenland and jeopardizing the current cooperation with them in pursuit of access to resources, a mutually beneficial deal could have been made that bolstered US-Greenland military cooperation to improve security, worked to repair a complicated bilateral history, and potentially even included critical minerals access. Instead, Trump paid no heed to efforts at cooperation and instead actively discouraged it by demanding that he alone control Greenland and using security as an excuse.

For their part, Greenland's leaders have responded to Trump's demands to control their island by stating "We don't want to be Americans, we don't want to be Danes, we want to be Greenlanders," (Wehner 2026). Greenland has long aspired for independence, and now has the right to declare it by vote, although it hasn't due to a long and complicated history of economic dependence on Denmark. Prior to Trump's 2026 remarks, in 2024 Greenland published its own Arctic strategy with the slogan 'Nothing about us without us'. In it, a section is devoted specifically to cooperation with the US and several goals include deepening that cooperation, including in security. One important goal is to "work to ensure that the Defense Agreement of 1951 is expanded to include us as a party and for the greater benefit of our country," (17). Greenland was clearly open to more military involvement by the US, but wanted it to be directed at them rather than Denmark. Instead of pursuing that cooperation, Trump demanded control of the territory from Denmark, mocked Greenlanders defense efforts, and ignored their desires for independence.

As a result, he also jeopardized NATO, a key part of Arctic security. Following Trump's January remarks, Danish Prime Minister Mette Frederiksen told reporters that "If the US chooses to attack another NATO country militarily, then everything stops," (Wehner 2026). Without NATO, the Arctic would be considerably more vulnerable, especially the American Arctic, which as mentioned relies heavily on its Nordic allies in the region. After causing heated international debate over his attempts to acquire Greenland, Trump claimed he had reached an incredible beneficial agreement with Denmark to have military access to Greenland- which appears to be nothing substantial that was not already in the 1951 Defense of Greenland Agreement (Blake 2026). While this amending of the 1951 agreement does mark a clear development in, if nothing else, the orientation of the US policy in the Arctic, as does NATO's Arctic Sentry, what is ultimately absent is the actions conducted. Trump has implied that the amending of the 1951 agreement might now include access to some of Greenland's coveted rare earth minerals, although this is so far unconfirmed. But considering the lack of any security related benefits to the US from threatening its existing and important Arctic allies in an effort to get military access it already has, it seems like the resources might have been what Trump was after all along. And in the process, he jeopardized critical cooperation, research, and even security efforts. Had all four of the pillars of US Arctic policy been considered rather than simply resources, a mutually beneficial new agreement might have been reached with Greenland.

What Now?

It will be imperative that the next administration in the US, regardless of political party, show that Trump's Arctic policy was an exception and not the norm for the US. At the same time, it must improve upon previous strategies by not neglecting any of the four pillars of Arctic policy and recognizing that they are all interconnected and must be adequately addressed. While Trump's overemphasis on security and resources while completely abandoning efforts at cooperation and research was incredibly harmful, the unclear split between the 4 pillars and the low prioritization of the region under Bush, Obama, and Biden was also harmful. In addition to balancing the pillars, future strategies must make it clear that although the US has historically neglected the region, the Arctic is now a priority.

This was an important factor of Trump's divergence from past US Arctic policy- his elevation of the region to a higher priority. Although in his case it was only in security and resources, making the region a high priority for US policy in all four areas is an important step for the future. In past US Arctic strategies, the region was classified as a low priority especially in security and cooperation because it was considered unproblematic and peaceful. In the strategies published under the Obama administration it was frequently described as a budget issue in which other areas of the world had to be prioritized for funding over the stable Arctic. In its 2016 strategy the Department of Defense said that "In this constrained fiscal environment, DoD must balance increasing defense investments in the Arctic with the need to make investments in other regions," (12-13). Although it was framed as a temporary measure because of the 'constrained fiscal environment', it continued the same policy from the 2013 DoD strategy, which stated

> The Department's strategic approach to the Arctic reflects the relatively low level of military threat in a region bounded by nation States that have not only publicly

> committed to working within a common framework of international law and diplomatic engagement, but have also demonstrated the ability and commitment to do so… The challenge is to balance the risk of having inadequate capabilities or insufficient capacity when required to operate in the region with the opportunity cost of making premature and/or unnecessary investments. (4; 12)

President Biden's strategies follow a similar pattern of classifying the Arctic as a low strategic priority with justifications of budget constraints, peaceful relations, and relying on allies. The strategies published under Trump, although overly security focused, divert from this pattern by considering the Arctic a high priority whose stability should not be taken for granted. The 2021 Army strategy published under his administration recognizes that Russia and China's actions in the Arctic are "a central problem the Department must prioritize" (15). The 2021 Department of Homeland Security strategy says that the "DHS will prioritize and invest in icebreaking capabilities," and "will seek the funding and resources needed to prioritize the procurement, training, and increased usage of unmanned systems technology to conduct its vital mission in the Arctic region," (16). The recognition that the region is becoming increasingly relevant is important. However, Trump failed to include invaluable research on how the region is being impacted by climate change and to account for the US's history of neglecting the region which has left it at a disadvantage.

Future administrations and strategies need to include all four pillars of Arctic strategy and admit to the US's inadequacies in the region while striving to repair them. Trump's engagement with Greenland in which he worked against cooperation in an effort to gain access to resources, in this case oil and critical minerals, was an extreme case that showed just how harmful abandoning any of the four pillars can be. By neglecting to consider cooperation with Greenland he risked ending the existing security deals the US has in place there as well as the entire NATO alliance, which is critical to US security in general and especially in the Arctic. Such a precarious situation cannot happen again, especially as the Arctic becomes more accessible and more contentious. To avoid a repeat, all four pillars must be considered in Arctic policy. In addition to a change in the broader approach to the policy, several concrete actions should be taken by future administrations. These include:

- Restoring funding to Arctic ice monitoring programs under the National Snow and Ice Data Center (NSIDC) and providing additional funding to make data captured after operations were limited publicly available
- Returning protections against oil drilling to the National Petroleum Reserve-Alaska (NPR-A)
- Investing in the refurbishment of American military bases in the Arctic, with priority given to Pituffik Space Base, Fort Greely, and Eareckson Air Station
- Returning to the practice of appointing an Arctic ambassador
- Holding high level bilateral meetings with Greenland with several areas of focus:
    - Increasing US military presence at Pituffik Space Base
    - Providing funding for the cleanup of former US military bases

    - Issuing a formal apology for the forced relocation of Inuit communities by the US
- Increasing the frequency of military exercises in the Arctic
- Working with Norway to improve Arctic-specific US military equipment, supplies, and uniforms

As the Arctic becomes increasingly accessible and geopolitically relevant it also becomes increasingly important that the US, as an Arctic nation, has a cohesive strategy for its policy and goals in the region. Departments that disagree on priorities and administrations that drastically change them undermine the US's credibility there, as does neglecting the region as an unimportant part of the country. It is too late to undo the US's past actions there, but improvements for the future can and must be made. Waiting until the Northern Sea Route is fully accessible or until Russia or China make an offensive move will be too late.

The Arctic is a unique and challenging place to operate in, and last minute adaptations would be inadequate. Long term preparation in all four pillars of US Arctic policy is essential. Cooperation with the US's Nordic allies is urgently important, especially following the fallout from Trump's offensive and inflammatory remarks about a country that is critical to its Arctic security and capabilities. Scientific research programs monitoring the operating environment, sea ice levels, permafrost melt, and other impacts of climate change are the only way to know what is happening in the Arctic and how to operate around it. Managing the plentiful resources in the Arctic is complicated, and local indigenous communities have to be a central part of that conversation. Russia and China are increasingly present in the region, and using all four of the pillars is necessary to make the Arctic a cohesive part of US policy, and to prepare against potential threats. The era of the Arctic being considered a stagnant, peaceful place, which was never really true to begin with, is officially over. The US needs to catch up with that fact while not neglecting any of the critical pillars that make up the Arctic policy landscape.

Appendix A: Analysis of Priorities in US Arctic Strategy Documents

	Security	Resources	Cooperation	Research
White House (2009) - *Under President George W. Bush*	Increase maritime awareness and presence to ensure freedom of navigation and project US sovereignty over its EEZ and disputed areas	The US should ratify UNCLOS to protect its claims to the Arctic Ocean and resources there like oil and gas. But it should obtain those resources in an environmentally safe way and respectfully of indigenous communities	Cooperate with the Arctic Council, the 8 Arctic nations, and indigenous communities	Collecting and sharing scientific data is important for monitoring climate change and Russia should be included in this. Data is also needed to monitor the NSR and resources
Navy (2009) - *Under President Barack Obama*	Increase domain awareness, training, and deployment capability in the Arctic	Determine the feasibility of the NSR and resource extraction for the future	Cooperate with other Arctic states, including Russia, and Native Alaskan tribes	Research how and when the environment will change to help with planning
White House (2013) - *Under President Barack Obama*	Improve Arctic infrastructure and emergency response, increase monitoring, and preserve freedom of navigation	Prepare the NSR for more ship traffic. Tap into the Arctic's oil and natural gas and determine how big the reserves are	Work to ratify UNCLOS, continue to participate in the Arctic Council, and expand Arctic cooperation to non-Arctic states	Keep environmental harms in mind when pursuing other goals, and promote research to be aware of the impacts
Coast Guard (2013) - *Under President Barack Obama*	Maritime rules, emergency response, and boundary lines need to be determined to prevent conflicts	Shipping, oil extraction, and mineral mining are increasing	Diplomacy is important for settling territorial and maritime disputes, including with Russia and Native groups	Sea ice melting before the US is prepared is risky. Data on ice coverage is important but has been underfunded
Department of Defense (2013) - *Under President Barack Obama*	The region is a low priority. Participate in joint exercises and increase monitoring but not at the expense of higher priority areas. Preserve freedom of navigation	Avoid press about a competition for Arctic resources that may increase tensions. It is unclear if the NSR will become accessible or when	Work with the Arctic Council and uphold current international agreements on the Arctic. US agencies must cooperate together.	Scientific research is an important arena for promoting cooperation
Navy (2014) - *Under President Barack Obama*	Maintain a presence and increase Arctic specific capabilities. Resource conflicts might arise later even with non-Arctic states, especially over territorial boundaries	Determine the feasibility of the NSR and resource extraction for the future	The Arctic Council is an important avenue of cooperation. Arctic states are largely peaceful and in agreement	Research needed on ice melt for domain awareness
Department of Defense (2016) - *Under President Barack Obama*	Improve Arctic operational capabilities, ensure freedom of navigation, and counter Russia and China	There are disagreements with Canada and Russia over who controls the NSR. Expect resource disputes to start increasing	Cooperation with other Arctic states is needed because the US cannot prioritize Arctic security. Canada is an especially important ally	Scientific monitoring of the Arctic is needed to increase domain awareness
Navy (2019) - *Under President Donald Trump*	The region is peaceful between all Arctic states including Russia. Deterrence is the primary goal	EEZ boundary debates and involvement of non-Arctic states means more regulations are needed about resources	Cooperation with Canada and NATO is especially important	Need to develop better models for the environment and geography of the region
Coast Guard (2019) - *Under President Donald Trump*	Russia and China now pose threats in the Arctic. The US needs to increase its icebreaker count and Arctic awareness and capabilities	Counter illegal resource extraction and encroachment by Russia and China	Partnering with Arctic states and others is important. Domestically the CG is the lead organization on Arctic security	Research is needed to increase domain awareness and track the changing environment

	Security	Resources	Cooperation	Research
Department of Defense (2019) - *Under President Donald Trump*	Conduct more exercises and training in the Arctic, deter aggression and escalation, including from China, and ensure freedom of navigation	Thawing ice due to climate change and increasing access to resources is a benefit	Cooperate with countries to monitor the GIUK gap. Increase NATO involvement in the Arctic. China is not a near Arctic state	China's dual use of Arctic research stations is a threat. Emphasizes domestic research efforts over multilateral ones
Air Force (2020) - *Under President Donald Trump*	The Arctic is key to US defense, deterrence, and power projection. Russia and China are trying to take control of it	Oil, gas, and critical minerals are becoming available due to melting ice and present an opportunity	Cooperate with all Arctic states other than Russia and increase military interoperability through training and exercises	Work with Space force to increase monitoring for both weather and aerospace defense
Navy (2021) - *Under President Donald Trump*	The US must increase its presence and capabilities in the Arctic to deter Russia and China, who are escalating tensions	The transit routes in the Arctic, including the GIUK gap, are important for trade and military access. And the resources there will have a significant impact on the global economy	Burden sharing for defense is important between the Arctic allies	Promoting research into Arctic specific capabilities and operations
Department of Homeland Security (2021) - *Under President Donald Trump*	Increase domain awareness, protect freedom of navigation, and deter illegal extraction of US resources in the Arctic	The Arctic is vital because of oil, minerals, and trading routes which are becoming more accessible	Cooperation with the Arctic states, France, Japan, and the UK is needed to counter Russia and China	More icebreakers are needed both for research and projection of sovereignty
Army (2021) - *Under President Donald Trump*	The Arctic could become a conflict zone with Russia and China because they are both becoming offensive, rather than just defensive, in the region	Oil, gas and especially rare earth minerals are necessary for US weapons systems and other strategic needs	While Arctic allies are important, the era of the Arctic as a peaceful zone of cooperation is ending	Research is needed into how the military can best adapt to Arctic operating conditions
White House (2022) - *Under President Joe Biden*	Improve monitoring of the Arctic, get more icebreakers, and conduct training exercises there	Promote private sector investment in Arctic resources including critical minerals	Cooperate with the Arctic Council, all Arctic nations except Russia, NATO, and interested non-Arctic states. Try to ratify UNCLOS	Research climate change mitigation and cooperate with indigenous communities for stewardship and knowledge
Department of Defense (2024) - *Under President Joe Biden*	Russia and China are working together in the Arctic against the other nations. We need more domain awareness and Arctic specific operating capabilities. But the Arctic is not higher priority than many other areas	Russia and China are going after resources and increasing competition. No mention of US extraction of resources	All Arctic states but Russia are now in NATO which means more cooperation, especially with exercises	Long and short term data about the Arctic operating environment are vital. Incorporate indigenous knowledge

Alignment Atlas

Introduction

The ground is hard on her feet; perhaps it is her age, perhaps her elevation that wears upon her. A refugee, fleeing Lhasa, Tibet, while cameras watch her and border guards pursue her. Nonetheless, 9-year-old Tashi and her family trek their way across the high mountains, where snow leopards den and sherpas march. In Nepal, Tashi will not find relief; she will merely find a life without a nationality, a refugee without status, but such is the cost of retaining culture and tradition- the sacrifice of the very city wherein it was born.

In the humid air of Latin America, construction crews labor under the sun, building roads and bridges, and yet they are of Chinese origin, paid by Chinese policy banks. Such a scene is mirrored in Africa, the Middle East, and Southeast Asia.

Chinese guns do not rust in the seaspray of the South Pacific, although they are never fired, either. Instead, they sit, precariously close to Australia and New Zealand, but welcomed by a host without a say- the Solomon Islands.

What these scenes have in common is not simply a relationship with China, nor just with the Chinese government's international affairs. Instead, each of these scenes represents the influence of Chinese power in nations throughout the world, to serve one nation's purpose. In Europe, information is processed through Huawei wiring and repeaters, through 5G, despite the US's strong attempts to limit the expansion of such Chinese-originated technology out of security concerns.

Arctic Ledger's *Alignment Atlas* observes and analyzes these events, shifts in foreign policy, and the critical nature of not just how one nation acts, but how all nations interact. China watchers may analyze the actions the nation takes in broad strokes, domestically and abroad; however, the devil is in the details; the complexities of the world are often two or three degrees away. Nonetheless, the overarching patterns, the way nations bow and sway towards one power or another, provide a larger picture of the world and who it yields to.

Some nations are like tall trees in large fields; they lean whichever way the wind blows; others are clustered in forests, or sit largely below the surface. Other nations still are the mountains which direct the wind, while the untouched regions of the world- the deep sea, space, and the poles- act as valleys wherein the wind may blow, but nothing will change.

The *Alignment Atlas* serves as a map of this terrain, with clusters such as the EU, mountains like the United States, and China; with smaller peaks such as Russia still vulnerable to the breeze. To understand which way the wind blows, one must look at a weather vane. To understand which way the world leans, one must look at the map- the Atlas.

Simultaneity: How South Korea's Chips and AI Face Washington and Beijing at Once

By Taeyoung Lee

Alignment Atlas, Region I: South Korea

I. Opening

Korea is exposed to the U.S.-China contest on both sides at once, and through the same assets. The two firms that anchor the U.S. memory-chip alliance run their China fabs under American licenses that now expire every year. In the first year of that regime, Korea sold China more chips than ever and turned a three-year trade deficit with Beijing into a surplus. The state program meant to give Korea its own AI trains on American GPUs and has disqualified its first casualty for carrying frozen weights from a Chinese model. Same firms, same chips, same year.

That makes Korea's case different from Taiwan's. Taiwan's exposure is a chokepoint, one asset the world cannot replace: as of 2021 the island held 92 percent of the world's capacity to make chips below 10 nanometers.[1] Korea holds nothing of that kind. Its memory can be made elsewhere. What Korea has instead is simultaneity, and Seoul's president has said that the old formula, security with Washington and economy with Beijing, no longer works.[2] This entry shows what has replaced it.

II. The Alliance Side

Washington did not close Korea's China fabs. It put them on a one-year clock. Samsung took $4.745 billion in CHIPS Act funding for its Texas fabs, and SK hynix took $458 million for an Indiana packaging plant.[3] Each award carries a ten-year bar on any "material expansion" of chipmaking capacity in China.[4]

In 2025 the terms tightened. On September 2, the Bureau of Industry and Security (BIS) struck three China fabs from the Validated End-User list, effective December 31, 2025: Samsung's Xi'an plant, SK hynix's Wuxi plant, and the Dalian plant SK hynix bought from Intel, still listed under Intel's name.[5] BIS would license the fabs to keep running but "does not intend to grant licenses to expand capacity or upgrade technology at fabs in China."[6] On December 30, Reuters reported, Washington granted both firms licenses for calendar 2026.[7] Those licenses expire on December 31, 2026.[8] As of September 2026, no renewal has been reported. Reuters reported that SK Hynix was seeking approval to ship more equipment to Dalian while weighing a new plant in the United States.[9]

The firms have not pulled back. Both raised capital spending at their China fabs in 2025, Samsung's Xi'an by 67.5 percent and SK hynix's Wuxi by 102 percent.[10]

The alliance also carries a price. Seoul pledged $350 billion in U.S. investment, and Washington set its reciprocal tariff on Korean goods at 15 percent.[11] On chips, Washington promised terms "no less favorable" than those in any future agreement covering "a volume of semiconductor trade at least as large as Korea's,"[12] a formula Seoul reads as Taiwan parity.[13]

The rate did not hold. The 15 percent rate rested on tariffs the President had imposed under the International Emergency Economic Powers Act (IEEPA).[14] On February 20, 2026, the Supreme Court ruled that the Act does not authorize tariffs at all.[15] Korea's negotiated rate disappeared with those tariffs. The administration replaced the voided tariffs with a flat 10 percent surcharge on every trading partner, with no country-specific caps, which ran from February 24 to July 24.[16] When that surcharge expired, a new Section 301 duty took its place; for Korea it is set at 12.5 percent, net of the most-favored-nation rate.[17] In March, the Office of the U.S. Trade Representative (USTR) had also opened two sets of Section 301 investigations that name Korea, one on excess industrial capacity and one on forced labor.[18] The second produced the July duty.

Semiconductors sit on a separate track. A 25 percent tariff on chips took effect on January 15, 2026, but it reaches only a narrow class of advanced logic chips, not the memory Korea exports, and it defers "broader tariffs" the Commerce Secretary recommended to a second phase after negotiations.[19] The chip clause in the November deal is Seoul's insurance against that later round.

Chip 4, the four-way coordination among the United States, Japan, Taiwan, and Korea whose working group first met in September 2022, held one senior-officials meeting in February 2023; no later meeting has been publicly reported.[20]

III. The AI Front

Korea's AI ambitions run on the same two exposures. In September 2025 President Lee launched a National AI Strategy Committee with the goal of making Korea "one of the world's top three AI powers."[21] The centerpiece is a state-backed program to build sovereign foundation models; five consortia were selected in August 2025.[22] The compute comes from the United States. Nvidia announced in October 2025 that Korea would receive more than a quarter-million of its GPUs, up to 50,000 of them through the science ministry for sovereign AI development.[23]

Inputs are policed too. In January 2026 the ministry dropped Naver Cloud from the program because its models used encoders taken from an external open model with the weights left frozen.[24] The encoders came from Alibaba's Qwen.[25] Naver said in April that it would replace the vision encoder with its own.[26] A Korean sovereign model, then, trains on American chips and may not carry another model's weights. The weights that disqualified the first casualty were Chinese.

The rulebook followed. The AI Basic Act took effect on January 22, 2026. It imposes labeling duties on generative AI and a domestic-representative requirement on large foreign providers, and it leaves national defense and security uses outside its scope.[27]

Korea also keeps a seat in norm-setting, and in 2025 and 2026 Seoul used that seat on two fronts. On the civil side, Seoul signed the Paris summit statement on inclusive AI in February 2025, which Washington and London declined;[28] President Lee presided over a Security Council debate on AI in September;[29] and as APEC host Seoul wrote an AI initiative into the Gyeongju leaders' declaration in November.[30] On the military side Korea co-founded the Responsible AI in the Military Domain (REAIM) summit with the Netherlands in 2023 and hosted the second summit in Seoul in September 2024.[31] In 2025, Korea ran five regional consultations to carry the process forward,[32] and with the Netherlands it sponsored the UN General Assembly resolution on military AI adopted that

December by 167 votes to 5, the United States among the five.[33] In June 2026 Korea and the Netherlands gave the opening remarks at the Geneva consultations the resolution mandated; the United States did not attend, and Korea's ambassador proposed follow-up steps for the General Assembly to take up later in 2026.[34]

That work runs apart from the industrial program, and the separation is built in. The AI Basic Act exempts systems built for national defense or security.[35] Military AI sits with the defense ministry, which opened a Defense AI Center in 2025;[36] the model program and the GPU allocation sit with the science ministry.[37] And the two tracks point in different directions. In the same autumn that Korea sponsored a resolution Washington voted against, it agreed to take a quarter-million American GPUs,[38] and a bilateral deal signed that October refocused its AI Safety Institute's partnership with its American counterpart "on metrology and standards innovation."[39] On the rules for military AI, Korea and the Netherlands moved ahead without the United States. On the chips that train Korea's own models, Korea cannot move without the United States.

IV. The Counterweight: China in Current Figures

In the same year Washington put the fabs on a clock, Korea sold China more chips than ever.

Start with the baseline. Korea exported $709.7 billion in 2025; semiconductors accounted for $173.4 billion of it. China took $130.8 billion and the United States $122.9 billion.[40] China remained the largest market, but the gap had narrowed to under $8 billion.

Then 2026 broke the pattern. By September 5, exports had already passed the whole of 2025. Semiconductors made up $281.2 billion of the January-to-August total, 40.6 percent of everything Korea shipped.[41] Exports to China reached $145.3 billion, up 76.1 percent, more than in all of 2025.[42] The bilateral balance turned with them. In 2023, Korea ran its first annual trade deficit with China since ties began in 1992, $18.0 billion, and stayed in deficit through 2025.[43] In the first five months of 2026 it posted a $9.9 billion surplus, on Chinese demand for AI memory.[44]

The two firms show the same exposure from opposite sides. Samsung's China revenue reached ₩88.6 trillion in the first half of 2026, up 207.7 percent, against ₩70.6 trillion from the Americas.[45] SK hynix's mix ran the other way: 64.1 percent of first-half revenue came from the United States and 24.6 percent from China.[46] One firm now leans toward buyers in China and the other toward buyers in the United States. Both run their China fabs under the same annual license.

Politics followed trade. Xi Jinping met Lee Jae Myung in Gyeongju in November 2025, his first visit to Korea in eleven years, and Lee went to Beijing in January 2026.[47] The Beijing summit produced fourteen memoranda and a pledge of "meaningful progress within the year" on the services and investment chapters of the bilateral free trade agreement. Beijing also promised a general-license channel for Korean firms buying critical minerals.[48] The sixteenth negotiating round met in Beijing from August 31 to September 4.[49]

Beijing has also shown what it can withhold. On October 14, 2025, China's Ministry of Commerce sanctioned five U.S. subsidiaries of Hanwha Ocean for assisting a U.S. trade action against Chinese shipbuilding; on November 10 it suspended the sanctions for one year.[50] Three days earlier it had

suspended its October rare-earth export controls, until November 10, 2026.[51] Korea sourced 95 percent of its rare-earth metal imports from China in 2023.[52] Reach, then release, on Beijing's calendar.

Lee has said the old formula is gone. "It is true that Korea has pursued a position of security with the US and economy with China in the past," he told an audience in Washington in August 2025. "But we are no longer in a situation where such an attitude is possible."[53]

V. The Comparison

As in Vietnam's case, Korea is exposed to Washington and Beijing at the same time. But as in Taiwan's case, Korea's exposure to both runs through semiconductors. That combination is what sets Korea apart.

Taiwan's exposure runs through one asset. The island's share of advanced capacity[54] comes with a customer base on one side: 70 percent of TSMC's net revenue in 2024 came from North America.[55] Korea has no comparable concentration. In the first half of 2026 Samsung booked more revenue in China than in the Americas, and SK hynix booked nearly two-thirds of its revenue in the United States.

Vietnam is exposed on both sides at once, but through different assets. Hanoi raised its U.S. relationship to a comprehensive strategic partnership in 2023[56] while buying 38 percent of its imports from China in 2024.[57] Semiconductors play little part in either tie. Vietnam's chip role is assembly, test, and packaging, about 1 percent of global capacity in that segment in 2022, and its first wafer fab, approved in 2025, is targeted for completion before 2030.[58]

Korea's two exposures run through the same assets. The fabs that Washington licenses sit inside the market that now buys more Korean chips than any other. The GPUs that Washington sells are the compute behind a model program that dropped a team for carrying Chinese weights. Vietnam hedges with diplomacy on one side and trade on the other. Korea cannot separate the sides, because the same chip, the same fab, and the same program face both.

VI. Placement and Close

In the running order of Region I, Korea belongs between Taiwan and Vietnam. Taiwan is the case of one country holding an asset the world cannot replace. Vietnam is the case of one country exposed to both powers through different channels: diplomacy toward Washington and trade with Beijing. Korea has Vietnam's double exposure and Taiwan's semiconductor channel, but has none of Vietnam's room to keep the two apart.

Korea is not being asked to choose between Washington and Beijing. Korea is being asked to meet dates. Beijing's suspensions of the rare-earth export controls and of the Hanwha Ocean sanctions lapse on November 10, 2026. The American licenses for the two firms' China fabs expire on December 31, 2026, and as of this writing no renewal for 2027 has been announced. Beyond that, Seoul must fund the next installment of the $350 billion pledge, with Washington already asking for more, and the teams left in the sovereign-model program must pass the next evaluation without borrowed weights. None of these is a choice. Each is a permission that one side can grant or

withhold, and each comes due on its own date. The question for Seoul in 2027 is not which side to choose. The question is how long one country can keep renewing permissions from both sides through the same firms, the same fabs, and the same program, and what each renewal will cost.

Infrastructure as Alignment: China's Bay of Bengal Strategy and the Structural Constraints on Bangladesh's Multi-Alignment Policy

By J. M. Lindstrom

Abstract

This article examines China's infrastructure developments in the Bay of Bengal littoral as a mechanism of structural alignment focusing on Bangladesh as the pivotal swing state as the center of potential great power competition emerging. Drawing on the concept of infrastructure-as-alignment, this article argues that Beijing's Belt and Road Initiative investments in Bangladeshi and regional port, transport, and energy infrastructure generate durable incentive structures that progressively shape Dhaka's diplomatic behavior. This is conducted without requiring explicit coercion. Chinese infrastructure creates a web of benefits with a long-term entanglement in Chinese influence surpassing that of debt-traps as used to analyse such projects in the past.This analysis proceeds in three parts; first it documents the scope and character of Chinese infrastructure across the Bay of Bengal littoral, primarily focusing on dual-use dimensions of port development at Chittagong and Mongla in Bangladesh as well as Kyaukphyu in Myanmar. Secondly it applies military-civil fusion doctrine (junmin ronghe, [军民融合]), as an analytical lens with which to argue that the The distinction between commercial and strategic infrastructure is structurally unstable under Chinese state enterprises governance. Lastly, it assesses Bangladesh's mutli-algnment strategy and argues that accumulated infrastructure dependency over a timeframe constrains the operational range of that strategy in ways that present hedging frameworks fail to fully capture. The article concludes with observations on the implications on regional security systems and South Asian states navigating great power competition in the Indian Ocean.

Keywords: *Belt and Road Initiative, Bangladesh, Bay of Bengal, infrastructure-as-alignment, military-civil fusion, great power competition, Indian Ocean, China*

I. Introduction

The Bay of Bengal is rising in its international prominence, particularly emphasized by the recent global concern over chokepoints such as the Strait of Hormuz and China's international expansion. It

has become the arena for modern great power competition; however, this is not a traditional competition of military might; rather, it is one of infrastructure. This is exemplified best in the incredible speed and financial efficiency with which Chinese state enterprises have constructed and financed ports, tunnels, bridges, power plants, and railways through South and Southeast Asia. In Bangladesh alone, approximately 670 Chinese firms have invested under the Belt and Road Initiative framework, creating twelve highways, twenty-one bridges, and twenty-seven power projects.[1] The Padma Multipurpose Bridge, the Karnaphuli Tunnel, which links the Chittagong port to Bangladesh's northern regions, as well as the deep-water terminal established at Mongla port, were all constructed with Chinese financial backing, as well as Chinese technical skill and expertise.[2]

Although these investments have been observed through strong analytical international attention, what underlies this analysis is the long-term structural consequence, not merely the short-term awe such grand projects impress. Infrastructure dependency is not an economic condition solely; it is the connective tissue a state relies on. In this case, should a state rely on a foreign power to build, maintain, and operate the technology of the most critical web of a nation, its ports, its energy grid, its transport arteries, it acquires structural incentives to protect the relationships that are independent of and more durable than any explicit political bargain. It is politics that forms dependency and forces good relations without any treaties being signed. Governments need not be pressured to avoid decisions that threaten relations which provide the very bloodline of their nation. These incentives are self-reinforcing as they operate through the everyday logic of maintenance contracts, spare parts supply chains, technical training ecosystems, and the accumulated human capital that forms around major infrastructure systems naturally over time. The dependency is pressure not in the form of any present threat; it becomes a condition of normal operation.

This article advances the concept of infrastructure-as-alignment to describe this dynamic. The argument is not that China uses infrastructure investment as a deliberate instrument of coercion; although such a possibility cannot be excluded and has been documented in other contexts.[3] The argument instead is more precise: that the accumulated weight of Chinese infrastructure presence in the Bay of Bengal littoral generates alignment incentive gradients which shape the diplomatic behavior of host states in ways which are indecipherable in any obvious, singular instance; they are difficult to reverse once established, and inadequately captured by existing frameworks of hedging and multi-alignment.

The mechanism at play here is not governmental pressure; it is not artificial nor contrived, it is natural, subtle, and therefore all the more deadly. A swimmer fears sharks in the water, not undercurrents. This is not governmental pressure; it is gravity.

Bangladesh is the central case for wariness with these undercurrents, as the largest economy in the littoral that is not a major power claimant. The state has meticulously pursued a multi-alignment strategy between China and India. Bangladesh represents the most analytically revealing test of infrastructure-as-alignment dynamics. Its interim government, formed following the July 2024 political upheaval and subsequent 2026 Bangladesh Nationalist Party electoral victory, has maintained and in several respects deepened the nation's participation in the Belt and Road Initiative (BRI). It has simultaneously signaled interest in closer engagement with India and Western partners.[4]

Understanding the exigence behind this requires a framework which surpasses the debt-trap narratives or simple bilateral relationship analyses. The argument developed here is that infrastructure dependency and multi-alignment coexist in a relationship of structural tension that becomes more consequential over time, rather than less. The more deeply Chinese-built infrastructure is embedded in Bangladesh's economic function, The more the operational range of Dhaka's multi-alignment strategy is shaped; not by any particular political design but rather by the accumulation of the weight of technical, financial, and logistical relationships which are now constitutive of the country's development trajectory.

This is not to say Bangladesh is checkmated, only that the costs of fully exercising independent agency have risen incrementally and will continue to do so, assuming further dependency. The cost of replacing Chinese technicians, sourcing spare parts, and the other series of ways the magnet of China pulls forth a straying Bangladesh will rise in proportion to the dependency of the nation.

This article proceeds as follows: Section II maps the scope of Chinese investment throughout the Bay of Bengal littoral, with an emphasis on dual-use port development. Section III then applies military-civil fusion doctrine as an analytical lens to argue the commercial/ strategic distinction is structurally unstable under Chinese state enterprise governance. Section IV examines Bangladesh's multi-alignment strategy and the constraints infrastructure dependency imposes upon it. Section V addresses India's counter-positioning and the emerging logic of competitive infrastructure rivalry. Lastly, Section VI concludes with final observations for regional security architecture.

II. The Littoral Footprint: Chinese Infrastructure Investment Across the Bay of Bengal

China's infrastructure footprint in the Bay of Bengal littoral has expanded rapidly across numerous sectors following 2013, when the Maritime Silk Road was formally announced as a component of the Belt and Road Initiative. The geographic strategy at play here is not discrete; the Bay of Bengal is the junction of the Indian Ocean and South China Sea, therefore commanding the western approaches to the Strait of Malacca. This chokepoint holds approximately eighty percent of China's imported transits.[5] Reducing the dependence on the The Malacca route has historically been described within strategic planning as the "Malacca Dilemma," is documented as a Chinese strategy priority, and port infrastructure on the Bay of Bengal as its primary instrument. The logic is twofold: commercially, the ports reduce transit times for energy imports, while strategically providing logistical nodes for the People's Liberation Army Navy (PLA-N) in any future contested scenario involving the Malacca approaches. A nation hoping to surpass the modern powers as its unique superpower must break free of all chokeholds which are impressed upon it, or else face its aspiration when it steps into the Thucydides' Trap.

In Bangladesh, the BRI investment portfolio is prominent as well as expanding. Chinese state firms have provided $400 million in financing to modernize Mongla port, the second largest in the nation, boosting capacity and efficiency in such a way that also enhances its suitability for a larger commercial, or even naval, vessel.[6] By enabling the berthing of large trading vessels, China in turn enables the berthing of Chinese military vessels.

The Karnaphuli Tunnel, completed under Chinese construction management, links Chittagong port directly to Bangladesh's northern road network, therefore significantly improving the port's hinterland connectivity. The tunnel is, structurally speaking, a force multiplier for Chittagong's commercial throughput, as well as the strategic value this presents to a state with interests in the Indian Ocean.

Chinese investment has also extended to the Payra deep-sea port development in Patuakhali district, the Dhaka-Chittagong expressway, as well as multiple power generation projects that make Chinese state enterprises further embedded in the management of Bangladesh's electricity supply.

Chittagong port itself has sustained Chinese strategic attention. In October 2024, for example, a Chinese naval fleet, with the destroyers Qi Jiguang and Jing Gangshan, conducted a goodwill visit to Chittagong, where bilateral meetings focused explicitly on naval cooperation.[7] This was preceded by Chinese naval vessels making port calls at Chittagong in 2016 and 2017. Each visit was correspondingly accompanied by joint exercises with the Bangladesh Navy and discussions of deeper naval cooperation frameworks. This pattern of naval engagement, overlaid on a network of commercial infrastructure relationships, creates a form of strategic familiarity which is not difficult to quantify but consequential in aggregate.

Chittagong is, of course, not a formal Chinese naval base. It is, however, a port whose physical capabilities, technical management systems, and operational tides are increasingly reminiscent of Chinese naval plans.

Myanmar portends a similar story. A Kyaukphyu deep-sea port in Rakhine State has been developed by a consortium led by China's state-owned CITIC Group under a fifty-year concession agreement.[8] Kyaukphyu serves the dual purpose of the terminus of the China Myanmar oil and gas pipeline, which carries six percent of China's annual crude imports overland to Yunnan Province, as a means of bypassing the Malacca Strait. It also serves as a proposed anchor to the China-Myanmar Economic Corridor.[9]

This port, when made operational in its fullest capacity, would provide China with direct maritime access to the Bay of Bengal from its southwestern hinterland, eliminating the Malacca transit for energy flows from that region entirely. As of mid-2025, construction progress has been severely disrupted by the Arakan Army's control of approximately eighty percent of Rakhine State. Beijing's response was the activation and authorized deployment of private Chinese security firms, reportedly staffed with former People's Liberation Army personnel. These security firms seek to protect the investment, denoting that the project is valuable enough to justify continued commitment despite conditions of active civil conflict.[10] Sri Lanka provides another crucial example, infrastructure-as-leverage, although it isn't simply a case of debt diplomacy. China International Trust Investment Corporation's Colombo International Container Terminal operates as the most productive terminal in Colombo's port, thus providing China with deep commercial familiarity in one of the Indian Ocean's most geographically strategic harbors. Hambantota port, debt-swapped in 2017 on a ninety-nine year lease to China Merchants Port Holdings, has not been converted for military use. The state of Sri Lanka explicitly prohibits this; however, it has demonstrably shaped Colombo's diplomatic posture in subsequent years, particularly through the inclusion of the

government's reluctance to endorse international positions that Beijing regards as sensitive. It also navigates US-India requests for access arrangements particularly meticulously, foretelling the Chinese influence at play.[11] These are the undercurrents to be wary of. The lesson within Hambantota is not that debt creates leverage; it is that established infrastructure creates and crystallizes leverage, long after the debt is restructured; the dependency relationship transfers from creditor to operator, in many ways a more crucial role.

Viewed across the glistening littoral, this pattern is consistent. Chinese state enterprises enter through commercial infrastructure contracts, then proceed to develop deep operational familiarity with critical nodes, soon accumulating a structural presence that host governments have strong incentives to protect. The mechanism does not require explicit military deployment, leveraging of debt, or political coercion. It operates instead through the logic of innate dependency, through maintenance relationships, training ecosystems, management contracts, and the fact that infrastructure, regardless of who constructs it, must be operated by someone. Even if a Western power established such construction in the very same waters, its operation would likely be contingent on China nonetheless.

III. Fusion and the Instability of the Commercial/Strategic Distinction

Military-civil fusion, *junmin ronghe* (军民融合), is the Chinese national strategy predicated on blurring the distinction between civilian and military applications of key technologies and infrastructure. This policy has been articulated formally under Xi Jinping, and crystallized in China's Thirteenth and Fourteenth Five-Year Plans. Military-civil fusion is not primarily a technology transfer strategy, although it has the dimension of technology involved. It is an organizational principle, wherein civilian infrastructure is able to be transformed to meet the logistics specifications to serve the People's Liberation Army, and its facets, including the Navy.[12] This quality is baked into the designs of these configurations from their inception, and then established into an operational quality when the time comes.

The United States Department of Defense's China Military Power Report has documented that under military-civil fusion standards, numerous Chinese state-owned commercial shipping and port infrastructure assets are built to the specifications which make them suitable for the People's Liberation Army logistics support.[13] This is not theoretical speculation, as China's Africa Center for Strategic Studies has identified multiple Chinese operated ports in the African littoral which meet these same specifications— including berth length, water depth, fueling capacity, and cargo processing. These are specifically organized to accommodate People's Liberation Army Navy vessels of the types deployed in contemporary out-of-area blue sea operations.[14] The same analytical framework applies to Bay of Bengal ports; Therefore, the question is not whether a port is designed as a military facility, but if it was designed to the specifications which permit dual use. Under military-civil fusion doctrine, the answer to the second question is often yes, regardless of the result of the first; the enabling of these facilities is likely baked in, and, knowing that Chinese state-owned

companies are constructing these facilities, it is possible that they are all designed for potential PLA-N military usage, even if they are built for foreign nations. Chittagong port's infrastructure, including the Karnaphuli Tunnel's road-port linkage and the expanded deep-water berths, is now compatible with the requirements for the Type 071 amphibious transport docks and Type 901 comprehensive supply ships that China deployed in its Peace Unity-2024 exercise. This domesticated the first confirmed long-range joint power projection exercise using the People's Liberation Army Joint Logistics Support Force in an overseas context.[15]

This compatibility does not mean China plans to deploy naval forces through Chittagong in wartime, or that the Bangladesh government would permit deployment. This article does not claim that China is in fact planning to utilize the Bay of Bengal as a military zone; however, the indicators that this military-civilian division is present. Bangladesh has explicitly declined to join a joint working group with China and Pakistan, refused to permit its territory to be used by either side in a potential great power conflict, and has maintained a principled position of military non-alignment that successive governments have treated as a foundational national interest.[16] Bangladesh's non-alignment policy is a sovereign choice, consistently applied, and any act that prompts China to utilize military engagement in foreign nations would indicate much larger international conflict ramifications. Military-civil fusion doctrine does not require war to generate value; it operates in peacetime through the benefit of commercial infrastructure. The existence of the option to turn commercial into military docks is a strategic play which forces acknowledgement by adversaries, forcing them to stay wary. It, in this way, alters the balance of leverage between host and patron of infrastructure and creates a form of extended deterrence that is entirely invisible in any formal treaty record. Bangladesh's non-alignment policy is structured and stable; however, the infrastructure landscape within the policy that has been implemented has been shaped by design standards that were never meant to be exclusively civilian. This power of Chinese influence in foreign projects expands further; Chinese state enterprises are legally required, under China's National Intelligence Law of 2017, to cooperate with state intelligence operations when directed to do so.[17] The firms that build and maintain this port infrastructure, control systems, sensor networks, logistical management platforms, and digital cargo tracking systems have access to operational data which is strategically valuable independent of the actual physical access to facilities.

The Karnaphuli Tunnel's control mechanisms, the Mongla port management systems, and the various other platforms tied to the BRI are all, in principle, subject to this legal obligation. The infrastructure is not merely physical; it is also informational; the throughput data of major commercial ports is intelligence in its own right. Chinese-built and Chinese managed infrastructure systems generate and transmit this data within technical architecture designed by Chinese state firms subject to Chinese law. The dependency is not only about who maintains the berths; it is about who reads the logs and has the right to them.

The structural instability of the commercial/strategic distinction is therefore not a future risk that might materialize under specific geopolitical conditions. It is a present condition that inherits in the design and governance architecture of Chinese state enterprise infrastructure as a class. Acknowledging this does not require imputing malicious intent to any particular investment decision. It requires recognizing that military-civil fusion is a stated national strategy, that Chinese

state enterprises are its primary instrument, and that the infrastructure they have built in the Bay of Bengal littoral embodies that strategy regardless of the commercial motivations that were also genuinely present.

IV. Bangladesh's Multi-Alignment Strategy and Constraints Dependency

Bangladesh's foreign policy through successive government leadership, since initial independence, has been defined through an effort to balance relationships with India, China, and the West. This policy is described as a hedging, omni-enmeshment, or multi-alignment strategy.[18] The heart of this approach is the notion that Bangladesh, a small state bounded by India on three sides and exposed to the Bay of Bengal on the fourth, cannot afford alignments exclusively with certain great powers; this would then create unacceptable constraints from other powers. To pick one ally is to restrict this nation from all others, and so autonomy is preserved through the ambiguity of multi-alignment. It is a rational response to a strategic geography that makes exclusive alignment fatal— to face solely one direction is to be blinded in the others; it is a similar strategy seen in Singapore's ability to find allies in all nations. The political transition of July 2024, wherein the Awami League government of Sheikh Hasina was removed and replaced with the interim government of Muhammad Yunus, did not disrupt this national orientation. The Bangladesh Nationalist Party's electoral victory in late 2026 has also maintained Bangladesh's participation in the BRI frameworks even as it has signaled interest in recalibrating the China-India balance to deepen engagement with Western partners on governance, trade, and digital infrastructure.[19]

This foreign policy posture is continued in the modern government, reflecting the notion that the infrastructure relationships established under preceding governments will not or at the very least cannot be dismantled without resulting in severe costs on the nation's economic funding. Backtracking is not an option for a nation in such a trap. The infrastructure-as-alignment thesis does not argue that this multi-alignment strategy is inoperative; Bangladesh's refusal to join the China-Pakistan joint working group in June 2025 displays the independence from Chinese preferential treatment at the height of Indo-Bangladeshi diplomatic tensions. It provides evidence that Dhaka retains meaningful independent agency on issues regarding its fundamental security.[20] The argument is more precisely that accumulated infrastructure dependency over time narrows the operational range of the agency a nation has in ways that are initially incremental, difficult to observe or quantify in any direct instance, and difficult as well to reverse without inflicting costs.

The weapons procurement trajectory is also imperative for understanding Bangladesh's position. Bangladesh's defense procurement has been heavily weighted toward Chinese systems over the past decade: the military operates Chinese-origin frigates, submarines, tanks, and fighter aircraft. In November 2025, Bangladesh took delivery of the SY-400, a short-range ballistic missile system from China's state-owned China Aerospace Science and Industry Corporation. This system forms the core of Myanmar's missile capability, therefore granting Beijing influence over two neighboring states' deterrence systems.[21]

The procurement decision is only natural from Bangladesh's perspective, as Chinese systems are cost-competitive, available without political conditions, and come with maintenance and training ecosystems that create long-term dependency relationships. The cumulative effect is, however, a

defense establishment that is deeply integrated with Chinese logistics, supply chains, and technical systems. This creates further incentives for the nation to maintain a relationship regardless of the political preference of whichever government is in power. A future Bangladeshi government which wishes to distance itself from China would face the problem that not only its infrastructure for economics and trade, but also its military is dependent upon Chinese systems, with Chinese-trained technicians in Chinese-sourced spare part biospheres.

This dynamic is a mirror of the economic terms but is systematically understated due to a lack of debt metric analysis. There are no clear debt metrics to measure these systems; instead, there is only the undercurrent: that which appears safe on the surface of the water may hold a deadly undertow. Bangladesh's external debt to China rested at seven percent of total foreign debt as of mid-2025, thus making China the fourth largest creditor after the World Bank, Asian Development Bank, and Japan.[22] This figure is cited as evidence against the debt-trap concerns; it's a counterpoint to the alarmist framings, and debt-trap literature has been frequently critiqued for its propensity to overstate the coercive leverage that flows from Chinese lending specifically. These are often polarized against specifically Chinese creditors, as opposed to the same credit that stems from other banking systems. Debt concentration should not be seen as the only, nor even the primary, mechanism that infrastructure dependency operates in the case of Bangladesh. The Padma Bridge, Mongla port, and Karnaphuli Tunnel are all completed assets, not outstanding debt obligations. However, their dependence remains; it is operational, not financial, as Bangladesh depends on Chinese technical expertise for maintenance, upgrades, and operations of the systems that are now established economic infrastructure. The operational dependence does not appear on a debt register, which is often what is fearmongered; it does not trigger IMF surveillance or donor-country concern; it is invisible to standard analytical tools used to assess external vulnerability, and it is more durable because it cannot be refinanced, whereas debt can be.

Lastly, there is the question of diplomatic posture in multilateral forums and Bangladeshi approaches. The nation's alignment on international resolutions involving Chinese core interests such as the South China Sea, Taiwan, Xinjiang, Hong Kong, and the juridical status of Chinese-claimed territories has consistently accommodated Beijing's preferences. This is true over numerous coalitions between nations over this range of discussions. Naturally, this is not entirely due to infrastructure dependency; such an assumption cannot be made; rather, Bangladesh may have strategic reasons of its own to avoid antagonizing its largest bilateral infrastructure partner and third-largest trade partner. The diplomatic posture may reflect Bangladeshi foreign policy preferences on these questions, although the relationships involving infrastructure create a baseline of structural incentive that is independent of and additive to whatever political preferences the particular Dhaka government may subscribe to. The incentive operates regardless of whether it is consciously experienced as pressure pulling in the nation or if it seems to be the natural ebb and flow of the tides of the Bay of Bengal. The notion of alignment-incentive displays the influence in a more subtle way of the nation of China upon the nation of Bangladesh through the more clandestine means than those of debt-traps or hedging frameworks and their respective proposals. The gradient this theory presents is not sudden, observable moments of coercion; oftentimes, the most effective power plays are the most indirect. Bangladesh retains the capacity to make independent decisions across a

variety of policy questions; however, what infrastructure-as-alignment does provide is the direction of travel of these issues involving deepening Chinese infrastructure relationships while diversifying away from those which require gaining dependency. Balance between the most productive additions from China and the least handicapping is key.

V. India's Counter-Positioning and the Logic of Competitive Infrastructure Rivalry

India's response to China's Bay of Bengal infrastructure expansion has evolved, over the past decade, from diplomatic concern to active counter-positioning. New Delhi's strategic anxiety about Chinese encirclement, the "string of pearls" framework, however contested as a description of a unified Chinese strategy, has driven substantial investment in alternative connectivity projects across the region, accelerated after the Doklam confrontation of 2017 and the Galwan Valley clashes of 2020 made the strategic stakes of Chinese infrastructure expansion viscerally clear to Indian policymakers.[23]

India's Kaladan Multimodal Transit Transport Project, which connects India's northeastern states to Myanmar's Sittwe port via the Kaladan River and a road link to Mizoram, is designed to provide Indian access to the Bay of Bengal without transiting Bangladesh or relying on the narrow Siliguri Corridor that connects India's northeast to the rest of the country. India's Press Information Bureau indicated in July 2025 that the project would be fully operational by 2027, though previous deadlines for the project have been missed due to civil conflict in Myanmar's Chin State.[24] The Kaladan project and China's Kyaukphyu investment share an uncomfortable strategic symmetry: both depend on whether stable governance and rule of law can be maintained across western Myanmar, a state currently in a deep and apparently durable civil war that neither Beijing nor New Delhi can resolve but that both must accommodate.

India has also deepened its engagement with Bangladesh on infrastructure terms, pursuing competing connectivity frameworks including the Agartala-Akhaura rail link, which became operational in 2023, and expanded road connectivity projects through Bangladesh to India's northeastern states. These projects are genuine, and their economic value to Bangladesh is real: access to Indian markets for Bangladeshi goods through multiple land routes reduces Dhaka's exposure to any single trading or transit relationship. But they arrive after more than a decade of Chinese infrastructure investment that has already embedded deep operational dependencies, and they are structured differently. Indian connectivity projects are typically smaller in scale, financed on harder terms, and less comprehensively packaged than Chinese BRI offerings, which bundle construction, financing, technical management, and training into a single contract that a relatively capacity-constrained procurement apparatus in a developing state finds much easier to manage. India's connectivity offer is playing competitive infrastructure catch-up in a race it entered late, and the gap in committed capital remains substantial.

The Bangladesh SY-400 missile procurement is instructive in this regard. India's response was to expedite deployment of additional S-400 surface-to-air missile systems and Rafale multirole fighter squadrons to West Bengal and Assam, officially framed as responses to Chinese positioning along the Line of Actual Control but understood in the regional strategic community as linked, at least partly, to concerns about Bangladesh's rising strike capabilities and their potential relationship to

Chinese strategic interests.[25] This reaction, interpreting a Bangladeshi procurement decision through the lens of Chinese strategic competition even when Bangladesh framed the decision in purely defensive terms, illustrates how infrastructure dependency and arms procurement dependency jointly reshape the regional security environment in ways that are not fully under any single state's control. Bangladesh's choices are increasingly read by New Delhi as moves in a great power competition game that Bangladesh did not design and does not control.

The broader implication is that infrastructure-as-alignment operates not only on the state whose infrastructure is being built but also on the states in its neighborhood. India's strategic calculus regarding Bangladesh has changed, not because Dhaka has explicitly aligned with Beijing, but because the structural weight of Chinese infrastructure presence means that any deepening of Bangladesh-China relations carries potential military-logistical significance that would not exist in the absence of that presence. The alignment gradient created by Chinese infrastructure investment in Bangladesh is experienced, in part, by India. It shapes New Delhi's threat perceptions, its investment decisions, its diplomatic posture toward Dhaka, and its willingness to offer alternative partnerships on terms that can compete with Chinese offerings.

Great power competition in the Bay of Bengal littoral is, to a significant degree, competition over the infrastructure-as-alignment dynamics that this article has described. The emerging competitive infrastructure rivalry between China and India in the Bay of Bengal presents Bangladesh with both opportunities and risks. The opportunity is genuine: competitive demand for Bangladesh's partnership increases Dhaka's bargaining power and may allow it to obtain better terms from both sides than it could in a less competitive environment. The risk is equally real: competitive great power rivalry has a tendency to demand clarity and commitment from smaller states that prefer ambiguity, and the infrastructure relationships that currently give Bangladesh structural ties to Beijing also give New Delhi strategic reasons to seek binding commitments that would foreclose the very multi-alignment flexibility that Bangladeshi foreign policy has historically depended upon. The space for genuine non alignment may narrow as the infrastructure competition intensifies.

VI. Conclusion

The Bay of Bengal is not a static domain, nor is it a settled theater of Chinese dominance. Bangladesh retains meaningful agency and exercises such agency selectively on issues it regards as fundamental and has demonstrated that formal neutrality remains a viable policy. The Kyaukphyu deep-sea port remains mired in civil conflict and construction uncertainty that neither Chinese finance nor private security firms are able to resolve in full. India is also building a competitive connectivity infrastructure, although it was belated and remains incomplete. The picture is not one of irreversible establishments.

The vector of the future’s unraveling is imperative, if not more, than the present position. Infrastructure-as-alignment operates through accumulation, with each established project, maintenance contract signed, each weapons system integrated, digital management platforms established, forging layer upon layer of structural incentive which makes the aggregate relationship harder to untangle. The dependency created by a completed bridge or port system is more durable than the dependency established through a loan because it is not tangible, it is not recorded on a

balance sheet, cannot be refinanced, and embeds itself in the daily operations of a functioning economy. The undercurrents are more fearsome than the fins the world is used to spying. It is not as experienced as dependence in the sense that debt is experienced as a liability, constraint, or number that is ideally reduced. It is instead experienced as a capability, as the firm which makes the port function, the tunnel remains maintained, and keeps the power on. The political economy of operational dependence systematically underweights its strategic costs.

Bangladesh need not reject Chinese infrastructure for fear of dependence; not only would it be economically irrational and politically impractical, it is already built. Expanding a nation through infrastructure need not mean innate dependence on China, even if it is true to some extent that there is entanglement. The Padma Bridge has improved connectivity for tens of millions of people in southwestern Bangladesh, the Karnaphuli Tunnel has greatly reduced transport costs for Chittagong's hinterland, while Mongla's modern facilities have expanded Bangladesh's export capacity. This article in no way believes these projects were fatal mistakes, merely that the dependency structures that have been created need to be actively managed. This would require a sophisticated, meticulous system, beyond debt metrics and procurement reviews such as at present. Active management means diversifying technical expertise and maintenance with multiple partners so that Chinese firms do not have a monopoly and are therefore not the sole controller of Bangladesh's industries. Additionally, developing domestic regulations to govern the information dimensions of Chinese-built infrastructure, including the control of tunnels and ports, the management of BRI-finance platforms, networks, and data flows through the systems that manage the infrastructure. Lastly, developing clear institutional frameworks for the conditions under which access to Chinese-built infrastructure would be made available for non-commercial purposes, which creates a need for credibility to both Beijing and New Delhi. This means engaging multilateral development institutions to provide finance and technical assistance for the maintenance of Chinese-built systems which reduce operational dependence on Chinese state enterprise providers. By benefiting from Chinese infrastructure, these Bengal Bay nations are also able to employ technicians from India to counter Chinese influence while remaining diplomatically balanced and friendly with each nation.

For regional and super-regional powers, the implication is that infrastructure competition in the Bay of Bengal is not reducible to a lending rate nor a gross investment volume metric. Western, Japanese, and Indian infrastructure offers need to be evaluated not in the short-term understanding of their economic value to Bangladesh but in terms of the capacity to create an environment wherein there is no singular master over the systems, the electricity, docks, and roads, but instead where Dhaka is able to preserve a multi-alignment range. This is more demanding, analytically, as it requires assessment beyond the cost-benefit of a project but what the technical ecosystem it creates and the operational dependencies it generates. Meeting this standard requires packaging competitive infrastructure offers from angles that match the convenience and comprehensiveness the BRI financing has provided, which in turn requires deeper coordination among similar donors and development finance institutions than has historically characterized their approach to the region.

The Bay of Bengal holds a strategic significance, one rising faster than the frameworks used to understand it can comprehend. Infrastructure-as-alignment is a concept that attempts to close this

gap by naming the structural mechanism that dual-use development and ambiguity produce in terms of geopolitical strategic consequence. The mechanism is not dramatic; it does not focus on the debt-trap narratives that are commonly sought after for geopolitical consequence. Rather, the natural, quieter undercurrent that shifts the sands in the Bay depicts a picture of progressive narrowing, wherein the operational range of small-state agency, through the accumulation of dependencies that are experienced as capabilities until they become, in moments of strategic consequence, cuffs. The web of interdependence China spins in the Bay of Bengal is not simply for its own interconnectivity, not only to expand its own domain, but also to tether and entangle nations trapped in it, who once saw it as a spacenet, elevating the nation. Understanding that mechanism of entrapment is the first condition for managing and mitigating it.

Türkiye's Middle Ground

By Fariya Chohan

Hedging serves as a form of risk-management for states in which the state avoid taking a firm side in rivalries or ongoing conflicts between major powers. Instead of publicizing a stance, the state practices a mixed approach to maintain flexibility, neutrality and to maximize their own gains. With its recent acts, Turkiye can be classified as a country that falls within this framework. The S-400 situation between Ankara, Washington, and Moscow solidifies this classification. Ankara made an unexpected choice by purchasing Russia's S-400 air-defence system which led to several developments within the air-defence system with concurrent implications on the political system.

During the deliberation process, Ankara considered the U.S Patriot and the Franco-Italian SAMP/T. It must be noted that nearly a month after the attempted coup of July 2016, Erdogan announced a new strategic partnership with Russia and interest in the S-400 technology. In 2017, Turkish officials commented on the S-400 arrangement and stated that transfer of technology was one of the most important aspects of this partnership. The U.S offer was unable to satisfy Turkiye's industrial demands. On December 18, 2018, the Defence Security Cooperation Agency notified Congress of a possible $3.5 billion sale to Turkiye for the Patriot air-defence equipment and relevant support. However, the notification stated Turkiye had made requests for industrial offsets but an agreement was yet to be concluded. The exact and precise benefits were not noted in the DSCA and were left to the individual contractors and Turkiye. Finally, as a result of the deliberation process, Turkiye signed a contract with Russia in September 2017. The reported value of this deal stands at $2.5 billion and under this deal, Russia agreed to deliver four S-400 batteries, technical cooperation and joint development. The exact scope of these commitments is not known within public records. However, it seems that the 2017 deal offered Ankara a higher standard of industrial cooperation. In reality, this standard seemed to be partly aspirational. It was reported that the first Russian shipments did actually not include technology transfer and negotiations were underway regarding the next few shipments.

From the general tracking of the deal and its timeline, it can be said that Turkiye selected the more illustrious Russian offer after Western negotiations failed to satisfy the publicly stated terms. Overall, the purchase of the S-400 equipment can be understood as a combination of operational need and industrial ambitions. However, it cannot clearly be established that Turkiye made this purchase solely to undermine its Western allies or to cross NATO. Current scholarship and records seem to be contested over this line of inquiry.

Regardless of the details of Ankara's specific decision-making process, the repercussions that followed were evident. Washington treated the S-400 as incompatible with Turkiye's role in the F-35 program. Previously, Turkiye served as one of the eight original partners in the F-35 consortium. It had both a consumer role and an industrial partner role as it produced components for the global F-35 supply chain. On July 12 2019, Turkiye received the first few elements of the S-400. As a result, the Department of Defence began removing Ankara from the Joint Strike Fighter Program in the same month. U.S officials argued that Turkish operation of the S-400 alongside the F-35 could

potentially allow Moscow to gather information about the F-35 programs. Using this as a basis for their reasoning, Turkiye began to be 'unwinded' from the F-35 Joint Strike Fighter program. This was no small loss to Turkiye. Turkiye had planned to acquire 100 F-35A aircraft. The Pentagon estimated that Turkey would lose more than $9 billion in projected work over the life of the program.

These facts serve to prove that Turkiye chose to defy Washington in a symbolic manner. It chose to accept the major industrial loss which spanned over training access, Western defence network participation, jobs, and future economic opportunities. This willing acceptance of 'defeat' and a stark 'defiance' point towards how much Ankara valued its strategic autonomy. Recently, President Trump expressed openness to an F-35 sale if Washington and Ankara could come to terms on a way which would render the S-400 inoperable. However, as per the legal language, Turkiye is required to 'no longer possess the system'. This means that disabling the system or storing would not be sufficient to satisfy American law.

After Turkiye's removal from the F-35 program, the United States officially imposed CAATSA sanctions on Turkiye on December 14, 2020. These sanctions were imposed under Section 231 of Countering America's Adversaries Through Sanctions Act (CAATSA) upon the Republic of Turkiye's Presidency of Defence Industries (SSB) for knowingly engaging in a significant transaction with Rosoboronexport. These sanctions were targeted upon specific areas rather than falling under a general economic embargo. This prohibited the issuance of U.S. export licenses and authorization to SSB. It also prohibited U.S financial institutions from providing SSB with loans or credits above $10 million in any 12-month period. They barred Export-Import Bank assistance for exports to SSB and required the United States to oppose loans benefiting SSB through international financial institutions. Additionally, visa restrictions were placed on Dr. Ismail Demir who served as SSB's president and other relevant SSB officers. The specific design of these restrictions allowed Washington to punish the defence-procurement channel but left room for potential positive U.S and Turkish relations.

It must be noted that Turkiye was seemingly treated differently from a country ~4200 kilometres away: India. New Delhi's case demonstrates the importance of Ankara's alliance status. In October 2018, India concluded a contract with President Putin for five S-400 systems. It can be said that India completed this deal knowing full well that it could potentially face U.S sanctions. However, the U.S did immediately impose such sanctions. In 2022, the Congressional Research Service reported that the Biden administration had not yet made a formal determination regarding the matter. Washington's divergence in dealing with these two scenarios can be boiled down to Turkiye's allied-status and participation in the F-35 program. As India currently holds a non-allied status, this gave Washington more flexibility in dealing with the matter.

The record after the S-400 deal between Russia and Turkiye offers adequate evidence as proof of Turkiye's hedging behaviour. However, it is not enough to prove an actual transfer of Turkiye towards China or Russia. Since then, Turkiye also maintained important ties with the West. Overall, Ankara accepted substantial costs to purchase Russia's S-400 air-defence system, yet it did not abandon NATO or sever Western defence ties. Hence, the S-400 episode supports the hedging

hypothesis. It shows a state using a Russian procurement decision to assert autonomy inside a Western alliance. However, it does not prove Turkish drift away from the established Western bloc.

In the Maghreb, the Great Powers Are the Instruments

Morocco hedges between an American security guarantee and a European market while Chinese capital arbitrages the gap. Algeria is quietly swapping Beijing in for Moscow. Neither state is being captured, and in both cases the relationship that decides the most is the one with the neighbour.

By Souheil Mouhajir · July 2026

This series classifies states by the mechanisms that actually produce dependency, sorting them as Captured, Leaning, Hedging, Contested, Reversal, Vacuum-Filling, or Inverted Patron and Client. Morocco and Algeria are neighbours with severed relations, opposite postures, and a shared border with the same two powers. They do not land in the same place, and the contrast is the most useful thing about reading them together.

Morocco: Hedging

Morocco holds about 50 billion metric tons of phosphate rock reserves against a world total near 73 billion, close to 68 percent, worked by the state-owned OCP Group from mine to fertiliser export (U.S. Geological Survey, "Mineral Commodity Summaries 2026," 2026; OCP Group, "Eurobond Prospectus," 2025). That inverts the usual question. Most cases in this series ask what leverage an outside power holds over a state. The phosphate position asks what leverage the state holds over everyone else, including both powers at once. Every category in the scheme assumes the country is the object of influence, and Morocco is partly a subject of it.

The American security relationship is the deepest Morocco holds with any power, and it is formalised rather than transactional. Washington designated Morocco a Major Non-NATO Ally in 2004, and Morocco is now the largest purchaser of US military equipment in Africa, with $8.545 billion in active Foreign Military Sales cases (U.S. Department of State, "U.S. Security Cooperation with Morocco," 2025). African Lion, US Africa Command’s largest annual exercise, ran its 2026 edition with roughly 5,000 personnel in Morocco alone (U.S. Africa Command, "African Lion 26," 2026). Washington also recognised Moroccan sovereignty over Western Sahara in December 2020, held the pen on Security Council Resolution 2797 in October 2025, and convened talks in Madrid and Washington in February 2026 that put Algerian and Moroccan representatives in the same room for the first time since relations were severed in 2021 (United Nations Security Council, "Resolution 2797," 2025).

Chinese engagement is large in value and shallow in structure. Chinese firms have committed roughly six billion dollars to Moroccan automotive since the pandemic, with announced battery and component projects reported above ten billion, concentrated around Tangier and Kenitra (Rhodium Group figures as reported in North Africa Post, "China’s Growing Investment in Morocco," 2026). Gotion Power Morocco is building the first gigafactory on the continent near Kenitra. Reporting in 2025 described a first phase of 20 gigawatt hours; the African Development Bank’s July 2026 release describes 10, which suggests the plan has been scaled back (Just Auto, "Gotion to Commence Construction of Morocco Gigafactory," 2025; Washington Post, "Morocco Secures $114 Million," 2026). COBCO, a joint venture between the Moroccan fund Al Mada and CNGR, began

producing cathode precursors at Jorf Lasfar in June 2025 at a facility costing about 1.8 billion euros (Electrive, "COBCO Starts EV Battery Material Production," 2025). In phosphates, OCP contracted Shanghai Zhenhua Heavy Industries for 205 million dollars of cargo-handling equipment at the Port of Safi (Morocco World News, "OCP Group Signs $205 Million Equipment Deal," 2025).

None of that is capture and little of it is leaning. There is no port concession, no majority foreign ownership of export infrastructure, and no sovereign debt structure of the kind that converts distress into control. ZPMC at Safi is a vendor contract. The battery projects are greenfield manufacturing with domestic equity participation, and the one disclosed financing term runs the other way: the African Development Bank approved a loan of 100 million euros, about 114 million dollars, to the Gotion project in July 2026 (Washington Post, 2026). The question worth asking is not how much Chinese money is present but whether any of it produces operational or financial control. On the public record it does not.

What the capital does produce is exposure to a third power. Morocco exported more than 26 billion euros to the European Union in 2025, its largest trading partner by a wide margin, and Tanger Med handled 11.1 million twenty-foot equivalent units, more than any other Mediterranean port (Tanger Med Port Authority, "Port Activity Report in 2025," 2026). Chinese capital is in Kenitra because goods of Moroccan origin enter the European market on preferential terms, not because of any Moroccan tilt toward Beijing. Brussels has begun to say so: the trade commissioner has used the word transshipment and stated that Chinese investors in Morocco must meet rules of origin requiring sufficient industrial transformation (as reported in Yabiladi, "EU Fears Chinese Investments Turning Morocco into Export Gateway," 2026). The legal basis is itself unstable, since the Court of Justice annulled the extension of tariff preferences to Western Sahara in October 2024 and the Council reconstructed them provisionally a year later (Court of Justice of the European Union, Joined Cases C-779/21 P and C-799/21 P, 2024; Council of the European Union, "Council Decision (EU) 2025/2022," 2025). Morocco is therefore Hedging, but the hedge is not held between Washington and Beijing. It is held between an American security guarantee and a European market, with Chinese capital arbitraging the gap between them.

Algeria: Leaning, twice, and toward neither pole

Algeria’s dominant external security relationship is with neither Washington nor Beijing, and it is moving. Russia supplied roughly 73 percent of Algerian arms between 2018 and 2022, making Algeria Moscow’s third largest customer worldwide (Zoubir, "Algeria-Russia Ties: Beyond Military Cooperation?," 2024). Between 2020 and 2024 the Russian share fell to 48 percent while China rose to 19 and Germany to 14, with Russian deliveries to Algeria down 81 percent across the two periods and Chinese armed drones among the transfers recorded (SIPRI, "Recent Trends in International Arms Transfers in the Middle East and North Africa," 2025). That is substitution rather than supplement. Russia’s post-2022 production constraints mean the patron cannot deliver at prior volumes, and Beijing is taking the share. On this scheme it is the beginning of a reversal, though not between the two powers the series tracks: the movement runs from Moscow toward Beijing, with Washington absent from the sequence entirely.

Energy runs the leverage in the opposite direction. Algeria is Africa's largest gas exporter and a principal supplier to southern Europe, hydrocarbons account for more than 90 percent of export revenue, and the energy minister reported roughly 31 billion dollars over the first eight months of 2025. Algeria also held a Security Council seat for 2024 and 2025. That is independent leverage of a kind most Leaning and Captured cases lack, and it rests on a narrowing base. The IMF projects an elevated fiscal deficit and international reserves falling to roughly 3.2 months of imports by 2030 absent policy change (International Monetary Fund, "Algeria: 2025 Article IV Consultation," 2025). Domestic consumption absorbs about 70 percent of national production and output at ageing fields is declining, which is why the hydrocarbons agency ALNAFT is preparing a 2026 licensing round on frontier acreage (Prospect, "Algeria to Launch Trans-Sahara Gas Pipeline in 2026," 2026). The Trans-Saharan pipeline should be read against that constraint rather than as evidence of abundance. It does not expand Algerian production. It monetises Nigerian gas through Algerian infrastructure, which moves Algeria from producer toward transit state, and a transit state's leverage rests on the supply behind it and the security of the corridor it carries, neither of which it controls.

China's position is real, sectorally concentrated, and closest to what this series elsewhere calls deniable capture. Algeria's national technology stack has been delivered substantially by Huawei, supported by a joint artificial intelligence laboratory, and the Dzair portal now runs 52 public services across the civil registry, justice, health, and land registry, with digital identity and an electronic wallet built in (iAfrica, "Algeria Reviews National AI Strategy Progress," 2026). No comparable Western presence exists in that layer, and it would be costly and slow to displace. The boundary is less clean than a telecommunications reading suggests: Sonatrach is working alongside Chinese partners to inspect and upgrade roughly 3,576 kilometres of pipeline feeding the Medgaz link to Spain and the Transmed corridor to Italy (Prospect, 2026). That is contractor work rather than ownership and does not meet the Leaning threshold on energy, but it places Chinese firms inside the maintenance of the export system on which Algerian leverage over Europe depends.

The multilateral picture is easily misread. Algeria applied to join BRICS in 2023 and did not obtain membership. It obtained the bank instead, depositing its instrument of accession to the New Development Bank on 19 May 2025 to become its ninth member (New Development Bank, "Algeria Officially Becomes Member Country," 2025). Algiers took the financing channel, headquartered in Shanghai, without the political bloc. The classification that follows is Leaning, twice over and toward two different powers: Russia in the security relationship, where the share is falling, and China in the technology layer, where it is rising. Toward the United States there is effectively nothing to classify. The movement actually underway in Algerian foreign policy is a withdrawal from France, a power that is neither pole of this series, and it is more useful to record that plainly than to resolve it into the scheme.

What they are really doing is watching each other

One factor shapes both and appears in few other cases: each is the other's primary strategic constraint. Relations have been severed since 2021, the Maghreb-Europe gas pipeline is closed, Western Sahara structures both states' room to manoeuvre, and Algeria declined to participate in the vote on Resolution 2797. Moroccan alignment with Washington and Algerian alignment with

Moscow are not only, or even mainly, responses to what those powers offer. They are positions taken against each other, in which the external powers function as instruments of a bilateral rivalry rather than as poles exerting pull.

That rivalry has just acquired its clearest infrastructural expression. Algeria broke ground on its 1,210 kilometre section of the 4,128 kilometre Trans-Saharan Gas Pipeline on 4 June 2026, run by Sonatrach (France 24, "Trans-Saharan Gas Pipeline: An African Dream," 2026; Pipeline Technology Journal, "How 4,128 Km of New Steel Could Reshape Europe's Energy Map," 2026). Six weeks later, on 19 July, ECOWAS heads of state signed the intergovernmental agreement governing the rival Nigeria-Morocco Atlantic line, roughly 25 billion dollars and still without a final investment decision (Morocco World News, "Continental Significance and Discontents," 2026). Both target about 30 billion cubic metres a year into a European market phasing out Russian gas by 2027, and each route carries the other's strongest objection. The Atlantic line terminates in territory where the Court of Justice has held that the consent of the people conditions the validity of agreements covering it. The Saharan line runs through the Sahel, which is why Algeria's restoration of diplomatic relations with Mali on 11 July matters more to a pipeline than it looks. Neither corridor is financed at the scale required, and the actors that will decide between them are European and American lenders rather than either capital.

Limitations this piece could not establish

- Chinese arms transfers to Algeria since 2024. SIPRI establishes the 2020 to 2024 shares but not what has been contracted since Russian supply constraints hardened. Whether the Chinese share keeps rising is the open question behind the Algerian classification.
- Whether Chinese involvement in Sonatrach's pipeline maintenance extends to financing, equity, or long-term service concessions. Only the contractor role is sourced. Ownership or financing terms would move Algeria from a technology-layer case to an energy one.
- The cost of the Trans-Saharan pipeline. Pipeline Technology Journal puts it at 10 to 13 billion dollars; France 24 puts it at 25 billion, the figure usually attached to the rival Atlantic line. The discrepancy is unresolved and no figure is asserted above.

An Analysis of the Sahel

By Dr. Sohail Mahmood

Since the Sahel bloc consisting of Mali, Niger and Burkina Faso began in the last two years, we have seen a relatively smooth transition of the security sector from Western actors to Russian backed actors with the Chinese taking part as a primary economic hedge. However, the actual security situation has deteriorated dramatically in 2026.

The Russian backed actors are more of a continuation with the death of Yevgeny Prigozhin (founder of Wagner) in 2023 seeing Moscow move to regulate the private military sector. This has led to many actors being renamed within the network to become the Africa Corps, with Russia's Ministry of Defence managing the group under Lt. Gen. Andrey Averyanov.[1] The transition was done gradually with Mali hosting 1000 Africa Corps soldiers by December 2024. However, around 1500 Wagner soldiers remain in-country.[1] This transition has continued with around another 1000 fighting added in June 2026.2 The Africa Corps now work alongside Mali's national army (FAMa). Smaller numbers have been deployed to Niger and Burkina Faso, with around 100 and 300 personnel respectively.[1]

The region has not improved however and the security situation has deteriorated most clearly in 2026. Mali is now one of the most dangerous areas for jihadists with around 40% of Burkina Faso not under the effective control of the state.[2] The year has been marked by a JNIM fuel blockade putting Bamako on a de-facto siege. In April JNIM and the Azawad Liberation Front (Tuareg led) launched the largest coordinated attack since 2012 on several locations including Bamako, Kati, Gao, Sévaré and Mopti. This attack resulted in the murder of Mali's defence minister Sadio Camara.[2] [3] Neither the Mali Army or Africa Corps expected such an attack.[3] There is much debate about the casualties suffered with Mali claiming that over 200 members were killed. The Africa Corps claims that over 1000 insurgents were killed and Russia stating that over 300 were killed.[3] This showed that the Russian backed actors were not replacing the Western actors one-for-one and JNIM and their rival Islamic State Sahel Province continue to grow in strength in the Liptako-Gourma tri-border zone.[2]

Although the Western withdrawal from the Sahel has happened, the effects are only becoming evident. France saw a major reduction as relationships with the juntas fell resulting in their closure or relocation of counter-terrorism bases. The most significant loss came from Niger with France pulling out after the 2023 coup. They lost their drone and surveillance capabilities.[4] Similarly, the U.S. saw their military cooperation agreement ended in March 2024 with Niger's junta resulting in them having to completely withdraw their counter-terrorism mission. They have also moved their remaining forces closer to Agadez.[5] However, this withdrawal has not been as complete. The U.S. still has around a thousand troops in Niger and have restarted drone flying and counter-terrorism activities. The Trump administration has also started to engage with Alliance of Sahel States governments.[6] However, much of the ISR capabilities have been moved to Nigeria. Around 200 personnel and numerous MQ-9 Reaper drones have been deployed to help with Nigeria's fight against Boko Haram and ISWAP. A senior AFRICOM official noted that they are not looking to

replace the drone base in Niger.[7] This results in a more complete withdrawal of surveillance capabilities with them now being focused on neighbouring countries.

China has not taken any obvious role in the security situation. They have invested in the mining sector with their state-owned Ganfeng opening a lithium mine in Southern Mali in December 2024. However, the juntas have moved away from Western companies to give mining rights to Russian, Chinese and Turkish interests. Niger has removed France's Orano from their uranium mines and Burkina Faso has nationalised British gold mines.[8] Analysts note that this has given Sahel Governments more confidence to cut their reliance on Europe as they now have more choices.[9] China have a strong position in Niger with Zijin Mining having a stake in gold and uranium. This is due to the trend of increased resource nationalism in the region with Canadian, British and French companies losing their licences.[9] [10] China are therefore acting as an investor and infrastructure partner, working with Governments that the West have largely distanced themselves from.

Overall, the Sahel bloc has not seen a stable tripartite division within the region. The Russian backed actors are now more present than ever since the transition to the Africa Corps but the April attack and fuel blockade in Bamako has shown they have failed to provide security to the juntas. The U.S. withdrawal has also not been as complete with activity in Niger continuing. Finally, China are increasing their economic influence in the region but the security situation surrounding these resources has increased in danger (as seen with the Morila gold mine in Mali being attacked in January 2026. Workers were taken hostage but released).[11] Overall, the security situation has changed but the region is now volatile with all external actors working in a Sahel that is more volatile than they intended.

South Africa – Dual Alignment

By Catherine Boudreaux

Introduction:

South Africa has long pursued a policy of non-alignment, maintaining relationships with Western powers while deepening its engagement with BRICS and other emerging economies. Despite recent political tensions,[1] substantial economic ties remain on both tracks, as indicated by trade figures under the African Growth and Opportunity Act (AGOA) and financing through the BRICS-established New Development Bank (NDB).

AGOA:

The African Growth and Opportunity Act is a preferential agreement between the United States and eligible sub-Saharan African countries that allows duty-free access to the U.S. Market, fostering economic growth and improved relations amongst nations.[2] According to the Office of the U.S. Trade Representative, AGOA eligibility is conditioned on progress toward market-oriented economic policies, democratic governance, rule of law, and human rights protections.[3]

AGOA has been reauthorized through the end of the year, granting South Africa, the largest beneficiary of the agreement, to continue benefiting from preferential access to the U.S. market.[4] While 2026 data is ongoing, the 2024 and 2025 numbers indicate a sharp decline in imports under the agreement.

AGOA imports from South Africa totaled roughly $4.07 billion in 2024 before falling to $1.75 billion in 2025.[5] The downward trend has continued in 2026 with imports under AGOA totaling $599 million between January and July.[6] South African auto exports were the largest source of imports under the Act, but plunged nearly 75% in 2025, from 25, 544 vehicles in 2024 to roughly 6, 500.[7]

Importantly, the decline in AGOA trade did not initially correspond to a decline in overall U.S. imports from South Africa. In 2024 to 2025, total imports increased from $14.59 billion to $15.97 billion[8] and revenue for both imports and exports of goods and services went up 10%, a nearly $2.6 billion increase.[9] The decline in the covered trade should therefore not on its own be read as an equivalent contraction of the broader relationship, although the downward trend under the act suggests political actions such as trade tariffs[10] threatening benefits rather than a declining partnership.[11]

As a unilateral U.S. trade preference program, these benefits remain subject to American policy decisions and periodic eligibility reviews. Although Congress has extended AGOA through 2028, the eligibility of each country in the agreement is reviewed annually by the White House. There is speculation as to whether South Africa's eligibility will remain intact or whether the country will be removed when decisions are made at the end of this year.[12] The fear stems from the past few years of worsening relations between the two countries and ongoing political tension. Nothing of this has been yet confirmed and the country continues to receive benefits, however if South Africa were to be

excluded, $20.5 billion worth of bilateral trade could be at risk and South Africa would certainly be affected.[13]

BRICS:

BRICS has become a major force in the last two decades and continues to make efforts as a forum for political and economic cooperation among emerging economies and Global South countries. Differing entirely from AGOA which is a distinct preferential trade agreement, BRICS instead acts as an international institution of emerging states, seeking to coordinate its members' economic and diplomatic policies and founding new financial organizations to decrease dependency on the U.S. dollar.[14] Founded in 2009 by four original members – Brazil, Russia, India, and China – South Africa joined two years later, signifying their role in the institution. Today, there are 11 official member states, as well as additional partner countries, now comprising more than 25% of the global economy and almost 50% of the global population.[15]

The New Development Bank reflects BRICS members' efforts to expand the role of emerging economies in international development finance. Established as an additional source of infrastructure and sustainable development financing, the Bank offers an alternative funding channel alongside traditional multilateral development institutions such as the World Bank and the IMF. It hopes to increase South-South cooperation by offering loans and other financial services to support private projects in member countries that contribute to development efforts. By focusing on a smaller number of members compared to these other global organizations, BRICS hopes to make access easier, thus eliciting support.[16]

NDB disbursements to South Africa have fluctuated considerably from year to year while maintaining an ongoing financial relationship. In 2025, the Bank disbursed $301 million to South Africa, accounting for nearly 11.15 percent of its $2.71 billion annual disbursements across all member states.[17] This marked a substantial increase from the $76 million disbursed in 2024.[18] Of the years examined, 2023 recorded the highest disbursements, with a total of $535 million, almost 16 percent of the total the bank dispersed,[19] illustrating the variability of annual financing rather than a linear upward trend.

Although annual disbursements fluctuate, the scale of outstanding financing ($3.81 billion at the end of 2025[20]) and continued approval of new projects indicate sustained engagement between South Africa and the NDB. That engagement has continued into 2026. In September, South Africa's government signed a $1 billion loan agreement with the Bank aimed at improving urban infrastructure.[21] While the disbursement has yet to take place, the agreement indicates continued expansion of South Africa's partnership with the NDB and BRICS.

As political tensions cause relationships to shift, potential changes to South Africa's AGOA eligibility could increase the importance of its economic relationships with emerging powers, particularly China. BRICS serves as an important platform for China's broader strategic objectives, including expanding the influence of emerging economies in international governance and promoting alternatives to traditionally Western-dominated institutions. The Chinese government has been a significant advocate of BRICS expansion and the attempt to shape its political significance

and international influence. Beijing has publicly opposed protectionism in international trade and restrictions on economic cooperation, proposing a greater role for developing states in economic governance.[22] China's role in supporting South Africa's entry into BRICS further reflects its interest in strengthening relationships with emerging economies. South Africa, meanwhile, has sought to rebalance trade with China, which is currently its largest individual trading partner.[23] Nevertheless, in regards to the NDB, its multilateral structure and distinct financing mandate mean that greater BRICS engagement would not necessarily compensate for reduced access to the U.S. market.

Conclusion:

Taken together, the figures indicate South Africa's dual economic engagement rather than a straightforward shift from one partnership towards another. Even as AGOA trade has declined, the United States remains a substantial commercial partner, while NDB financing continues to support South African development. The two relationships remain operating in concurrence: participating in U.S. linked trade structures while expanding engagement with emerging economies' financial institutions.

The distinction between AGOA and the NDB is fundamental to South Africa's dual alignment. One cannot merely replace the other, and South Africa's existing relationship with each suggests a continuance of strategic cooperation and multi-directional foreign policy, even as geopolitical tensions introduce uncertainty into these partnerships.

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