



NATO PARLIAMENTARY ASSEMBLY

POLITICAL COMMITTEE (PC)

**THE RISE OF CHINA:
IMPLICATIONS FOR
GLOBAL AND
EURO-ATLANTIC
SECURITY**

General Report

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I. INTRODUCTION

1. The rapid rise of the People's Republic of China (henceforth China) in the last part of the 20th century and early decades of the 21st century represents a paradigm shift in global affairs comparable in magnitude to the collapse of the Soviet Union.

2. The confrontation between China and the Euro-Atlantic community is neither desirable nor inevitable, while a failure by NATO to account for China and manage the challenges it presents could make confrontation over time more likely. Indeed, it would be irresponsible for Euro-Atlantic nations and institutions to further delay the revision of their strategies and capabilities in the light of the profound changes prompted by the growing assertiveness of the world's most populous country, second largest economy and defence spender as well as a growing global technology leader, guided by an ideology and approach that rejects liberal democratic values on which the Alliance was founded. China's controversial handling of the COVID-19 outbreak has magnified further the urgency of the China challenge for the Euro-Atlantic community.

3. As NATO Secretary General Jens Stoltenberg stated at the unveiling of the *NATO 2030* initiative in June 2020, "The rise of China is fundamentally shifting the global balance of power, heating up the race for economic and technological supremacy, multiplying the threat to open societies and individual freedoms, and increasing the competition over our values and our way of life." Adapting to this new balance of power is one of the key themes of the *NATO 2030* reflection process.

4. The rise of China will inevitably have – and is already having – consequences for Euro-Atlantic security. At their meeting in London in December 2019, NATO leaders included – for the first time – a reference to China in their joint declaration, noting that "China's growing influence and international policies present both opportunities and challenges that we need to address together as an Alliance." This is a significant change of policy and consistent with a recommendation made in the Political Committee's 2019 report on *NATO at 70*. While NATO's links with China date back to the early 2000s, they were limited to coordinating activities in the Asia-Pacific, a geographic area where NATO's involvement is only of an ad hoc character.

5. As NATO Secretary General Jens Stoltenberg stressed at the London meeting, this overdue acknowledgement of China's strategic heft was prompted not by NATO's intention to move into the South China Sea, but by the fact that China is increasing its influence and expanding its activities in the Euro-Atlantic area. China is investing in emerging technologies and state-of-the-art military capabilities including more survivable and mobile intercontinental nuclear missiles capable of reaching North America and Europe (NATO, 12 November 2019), engaging in cyber espionage against NATO countries and domestic industries, crushing democracy in Hong Kong in violation of a UK-China treaty, establishing footholds in Africa and in the Arctic, managing a competing infrastructure bank, building islands in areas of the South China Sea contested by its neighbours, some of which are US allies or major partners, and advancing a development initiative that encompasses more than 100 countries and a combined economic output of more than a quarter of global GDP (French, 2017).

6. The question for NATO is, are we up to countering that challenge or are we going to do what we have historically done as NATO, which is ignore it.

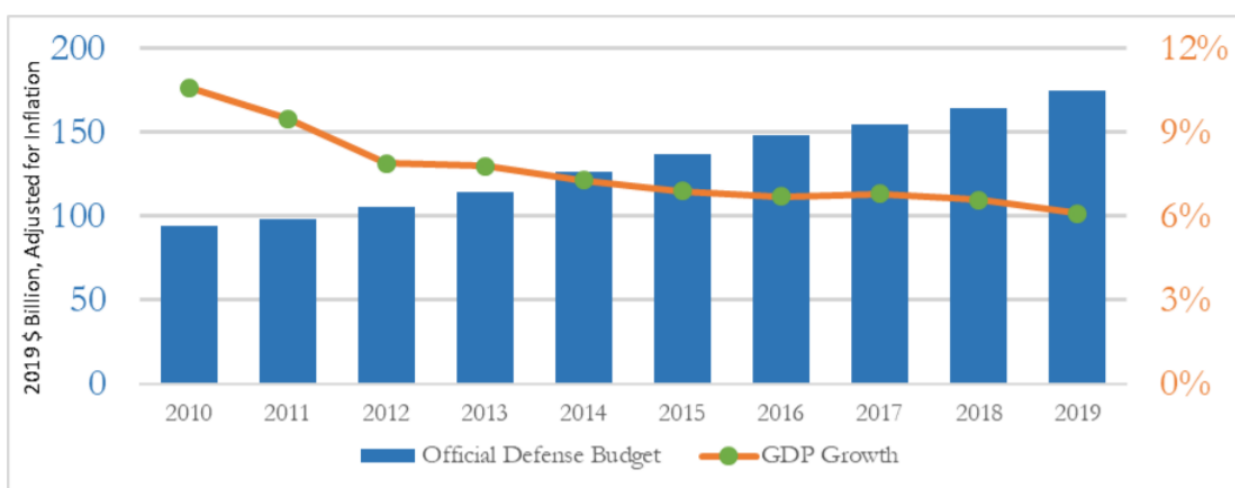
7. This report will assess China's foreign and defence policy toolbox and provide an overview of China's role in regional and global security as well as of China's relations with NATO. The Rapporteur will argue in favour of developing a joint strategy for North America and Europe in addressing the challenge of rising China and protecting the security and values of the transatlantic alliance.

II. CHINA'S FOREIGN AND DEFENCE POLICY TOOLBOX

A. MILITARY EXPANSION AND MODERNISATION

8. It was not until the late 1990s that a serious effort was undertaken to modernise the People's Liberation Army (PLA) and address its capability deficiencies. In 2000, the first US Department of Defense's (DoD) annual report to Congress assessed the PLA as a "mostly archaic military" and noted that it "lacked the capabilities, organization, and readiness for modern warfare" (DoD, 2020). However, between 2000 and 2016, Chinese military spending increased by an average of 10% per year (DIA, 2019), with estimates about its current nominal budget ranging anywhere from the official number of USD 177.5 billion (2019) to USD 261 billion (SIPRI estimate) (CSIS, 2020) – around 2% of total GDP. The rate of defence spending growth has somewhat slowed down in recent years (7.5% growth in 2019, and with budgeted growth of 6.6% for 2020) reflecting the trends in the Chinese economy (Westcott, 2020).

China: Official Defense Budget, 2010–2019

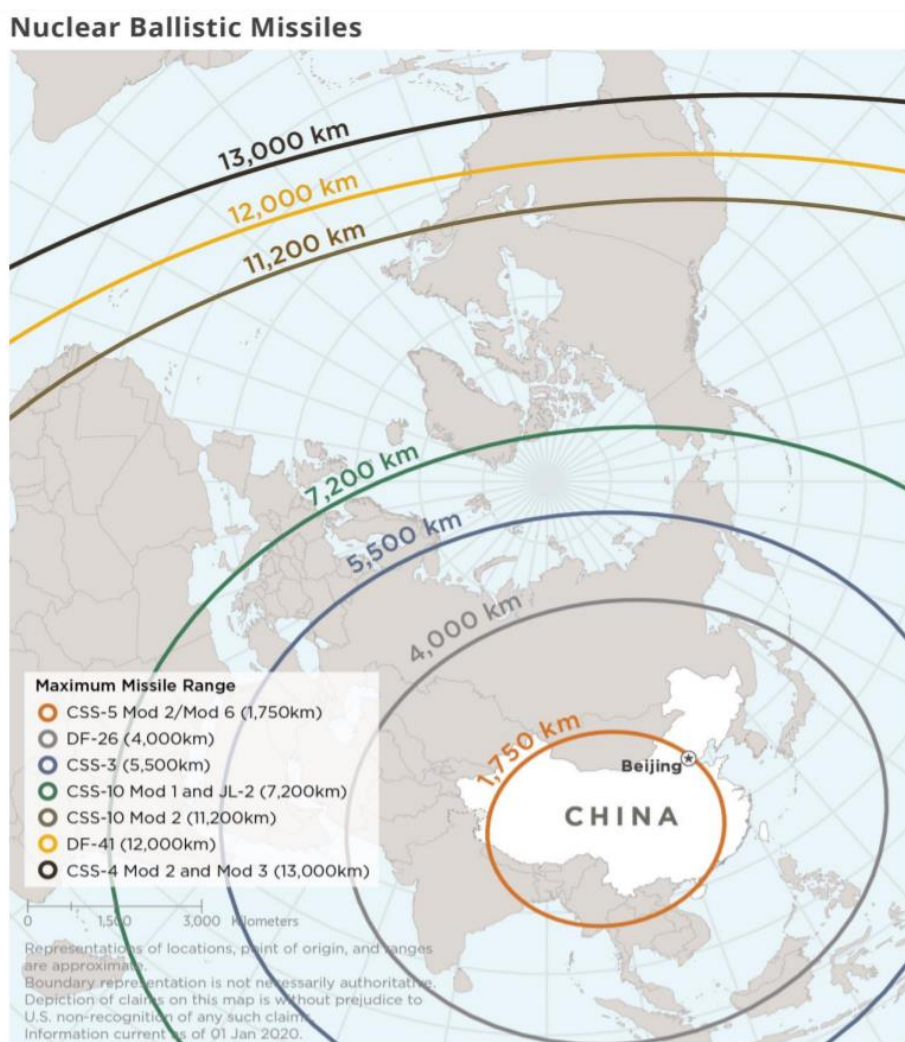


Source: US DoD

9. Under the leadership of Communist Party General Secretary Xi Jinping, the Chinese military is currently undergoing its most comprehensive reforms in at least 30 years. According to Xi's work report to the 19th Party Congress, the PLA must become "a mechanised force, with increased informatised [able to wage an information age war] and strategic capabilities" by 2020, a fully modernised force by 2035 and a world-class military by 2049 (DIA, 2019). The reforms are designed to make the PLA a leaner and a more lethal force capable of joint operations. This has resulted in a major structural and doctrinal reorganisation, including cutting approximately 300,000 personnel and the establishment of five joint theatre commands. The reforms are not only meant to strengthen the PLA but also to strengthen party control over the military. Under the reinforced "CMC (Central Military Commission) Chairman Responsibility System", Xi, who serves as Chairman of the CMC, holds ultimate authority over all military affairs. He has used this power to remove or side-line "potentially disloyal" or corrupt senior PLA officers and promoted those deemed to be politically reliable. Analysts believe that the reforms will probably lead to "significant improvements in the PLA's ability to plan and execute larger and more complex joint operations" (Saunders & Wuthnow, 2019).

10. China is procuring modern military equipment across the board. China is expected to double its nuclear weapon arsenal within a decade and to have roughly 200 warheads on land-based intercontinental ballistic missiles, capable of threatening Europe and North America, within five years (DoD, 2020). China also has a significant intermediate-range missile capability and has so far been reluctant to join an arms control agreement in this area. China is also investing in supersonic cruise missiles, modern drones, and hypersonic weapons (NATO, 14 November 2019). According to the think tank International Institute for Strategic Studies, since 2014, China has procured more

submarines and naval ships than were currently serving in the navies of Germany, India, Spain, Taiwan, and the United Kingdom combined as of 2018. According to the US Department of Defense, China “has the largest navy in the world” with some 350 ships and submarines (DoD, 2020). China’s navy, which includes its first domestically built aircraft carrier, *Shandong*, is giving China blue-water capabilities and the ability to conduct sustained operations and project power far from China’s periphery. The PLA’s expeditionary capabilities are limited but growing. The Chinese air force, which is the largest in Asia and the third-largest in the world, is also adding such advanced platforms as the fifth-generation J-20 stealth fighter (Westcott, 2020).



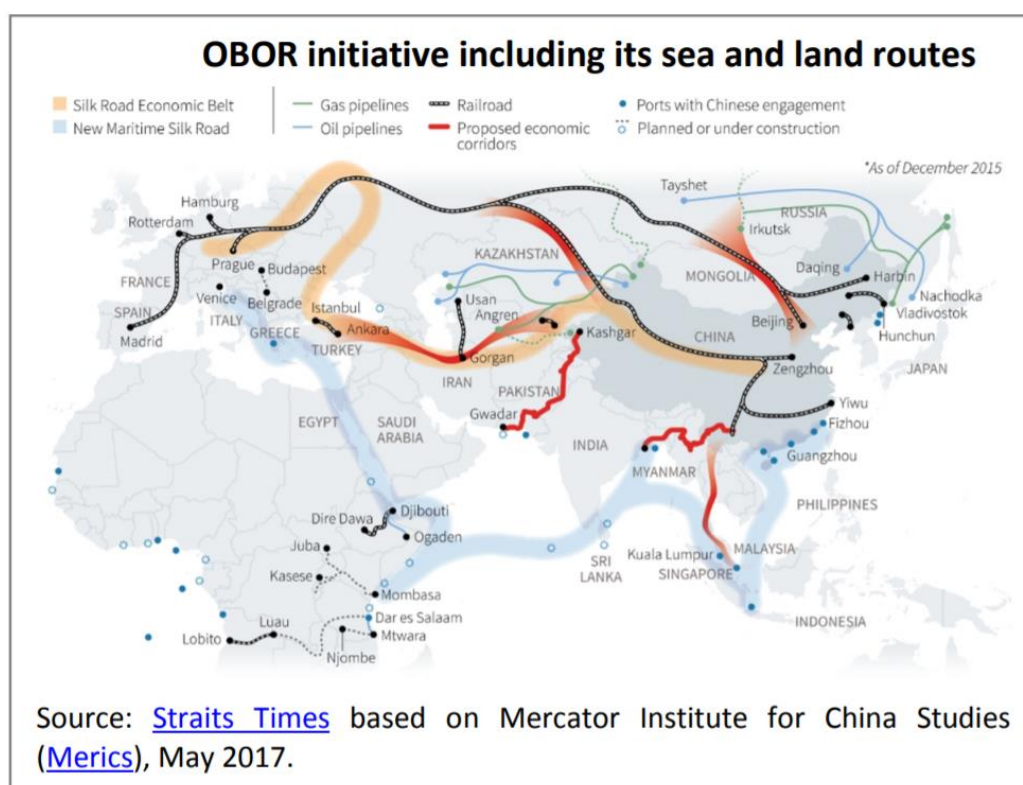
Source: US DoD

11. Another important part of the reforms is the development of the “Military-Civil Fusion” (MCF) doctrine. The MCF seeks to eliminate the barriers between the Chinese civilian and defence economies to ensure that new technologies simultaneously serve both military and economic development (US Department of State, 2020). The primary purpose behind the MCF is to ensure that the PLA can quickly gain advantage of technological advances in the civilian sector, particularly regarding potentially disruptive technologies such as artificial intelligence (AI), drones, and quantum computing. Such technologies are often dual-use. China’s integration of civil and military innovation has sharpened the issues around the theft of Western intellectual property, the regulation of dual-use exports, forced technology transfers, intelligence gathering, as well as academic collaboration and exchanges. It is important to note that joint research programmes and commercial ventures between Chinese and Western stakeholders are often exploited to build China’s future weapons systems – often without the consent and knowledge of the participating firms or academics (US Department of State, 2020).

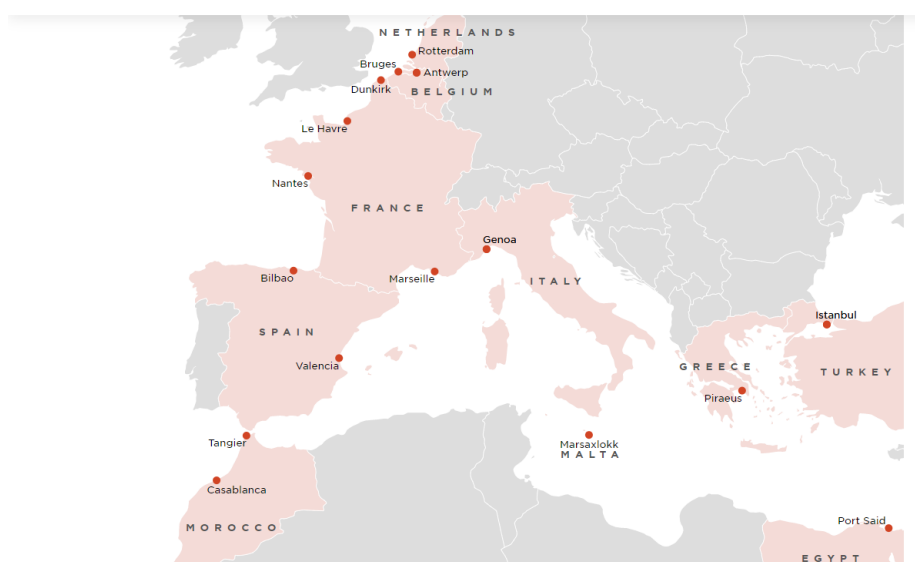
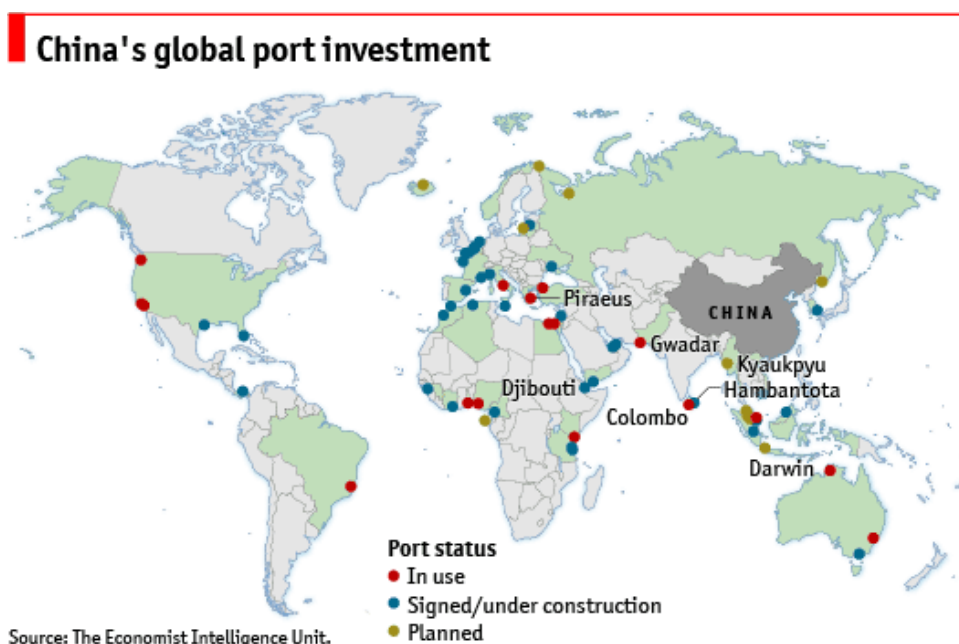
12. While there are challenges facing China's military, including lack of combat experience, difficulties achieving "jointness," and pervasive corruption in its ranks, the PLA is on a path to becoming a better organised, more technologically advanced and more flexible force capable of conducting complex missions both at home and abroad (DIA, 2019). Beijing's clear aspiration is to project credible military power around the world. China's global ambitions have been exemplified by the PLA's operations in the Indian Ocean, the Mediterranean, the Arctic region, and the Baltic Sea (Oertel, 2019). Notably, in July 2017, the Chinese navy undertook joint exercises with Russian ships in the Baltic Sea – a region fraught with geopolitical tension between NATO and Russia. This exercise is broadly indicative of China's expanding military capabilities and global role that directly affects the Alliance.

B. ECONOMIC DEVELOPMENT INFLUENCE

13. Over the course of the last four decades, the Chinese economy has undergone the "fastest sustained expansion by a major country in history" (CRS, 2019). China is now the largest trading partner of more than 128 nations (Leng & Rajah, 2019) and has become a major source of foreign direct investment (FDI) and infrastructure financing in the world. From 2005-2017, Chinese firms invested USD 324 billion in Europe, which constitutes 31% of China's global outbound FDI (CSIS, January 2020). After the initial shock of the COVID-19 outbreak, the Chinese economy bounced back quickly and, at the time of writing, was widely projected to end the year 2020 with net positive growth, while most of China's economic rivals are mired in recessions. Chinese exports have, in fact, soared in the course of 2020, owing mainly to the fact that Chinese factories specialise in commodities in high demand during the pandemic, ranging from electronics to household goods (Bradsher, 2020). China played a key role in forming a new major regional trade bloc – the Regional Comprehensive Economic Partnership (RCEP). Signed in November 2020 after 8 years of negotiations, RCEP is widely seen as the Chinese-backed response to the United States' Trans-Pacific Partnership (TPP) proposal, scrapped in 2017 by the Trump administration. While RCEP does not envisage ambitious tariff cuts in the immediate future, its sheer size – involving 15 countries in the Asia-Pacific that account for one third of the world's population and almost 30% of global GDP – makes RCEP a significant global factor. Analysts expect RCEP to primarily benefit China, Japan and South Korea. The ratification process is expected to be arduous in some countries that signed the deal (BBC, November 2020).



14. Since 2000, Beijing has been encouraging Chinese companies (particularly state-owned – SOEs) to “go global” in order to secure access to natural resources, but also, increasingly, to make strategic acquisitions, obtain technology and management skills and position to compete in global markets (CRS, 2019). However, it was the launch of what has become known as the Belt and Road Initiative (BRI, previously known as One Belt One Road) in 2013 that focused the world’s attention on Chinese investment and overseas infrastructure policy. The BRI seeks to enhance “China’s connectivity” with the world by improving physical infrastructure, aligning developmental policy and regulatory standards, and strengthening cultural ties with other countries. By one account, by October 2019, the BRI covered 138 countries that account for about 61% of the world’s population (CSIS, 2019). This undertaking is primarily financed by Chinese state banks and government-directed investment funds (88%), and the main recipients tend to be China’s SOEs allowing them to offer extremely competitive bids (He, 2019).



Source: Olaf Merk, *Revue internationale et stratégique* (2017), *China Merchants Port Holdings and COSCO Shipping Ports*
 Credit: Research and fact check by Vanessa Qian and Ayda Pourasad/NPR. Design and development by Vanessa Qian/NPR

Ports in which the Chinese state-owned enterprises COSCO Shipping Ports and China Merchants Port Holdings have acquired stakes (Kakissis, 2018).

15. In addition to deepening China's trade ties, the BRI has the potential to re-orient a large part of the world's economy towards China, which, in turn, would considerably increase China's global leverage. This development can already be observed in Central Asia, Latin America, and Africa, but also in Europe where more and more countries align themselves diplomatically with Beijing in the hope of gaining access to Chinese investments (Bugajski, 2019). Although BRI projects are ostensibly pursued for their economic and development potential, they may also carry political and security implications for host countries. This situation is further exacerbated by the fact that many BRI countries suffer from weak government institutions, political instability, and high corruption, making many BRI projects economically unviable (He, 2019). This has given rise to allegations that China is coercing developing countries into participating in such projects, to gain access to resources and critical infrastructure. From 2012-2017, Chinese firms invested USD 50 billion in the European and North American transportation sectors, a five-fold increase from the preceding five-year period (CSIS, 2020). In the past decade, Chinese companies have acquired stakes in 13 ports in Europe, including in Greece, Spain and, most recently, Belgium; those ports together handle about 10 percent of Europe's shipping container capacity. Investment in ports has been followed by Chinese naval deployments as had been the case the ports of Djibouti, Sri Lanka and Pakistan (Kakissis, 2018). The Hambantota port in Sri Lanka, which your rapporteur visited in February 2017 amid an intense public debate about the future of the port, now serves as the prime example of this so-called "debt-trap diplomacy": in December 2017, the port was taken over by a Chinese SOE via a 99-year lease when the Sri Lankan government could no longer service its debts (Brautigam, 2020). In other cases, BRI countries have strong rules and norms but choose to waive them for China. The US initiative, the Blue Dot Network "aims to promote quality infrastructure investment that is open and inclusive, transparent, economically viable, financially, environmentally, and socially sustainable, and compliant with international standards, laws, and regulations" and is a welcome template for further collaboration with NATO countries to promote alternatives to the BRI. China's investment in and takeover of critical infrastructure and facilities in Europe could decrease NATO allies' willingness to move military forces and sensitive technologies through, for instance, Chinese controlled ports and surrounding networks (Speranza, 2020).

16. Although there are efforts underway to improve the debt sustainability of investments, the BRI in particular and China in general are confronted with a growing backlash due to its heavy-handed approach to foreign direct investment and development (Heydarian, 2019). The BRI is discussed extensively in a concurrent 2020 Economics and Security Committee report: [China's Belt and Road Initiative: a Strategic and Economic Assessment](#).

C. ADVANCED TECHNOLOGY LEADERSHIP

17. China aims to become a global leader in strategic emerging technologies such as cyber, AI, and quantum technologies, many of which have current or future potential applications that are likely to be dual-use in nature, that is, having both civilian/commercial and military applications. Xi Jinping has emphasised the need for China to become a "Cyber Superpower" (Creemers, et al., 2018). Cyberspace has become an area of focus for the Chinese military, and the primary public manifestation of Beijing's cyber capabilities has been the growing threat of Chinese cyber espionage. China has long been engaged in industrial espionage to advance its national development objectives in both the military as well as the economic domain, and has deployed cyber capabilities/tools to illicitly acquire proprietary foreign commercial knowhow (FBI, 2020). Although Western countries have repeatedly attempted to dissuade China from continuing this practice¹, Beijing remains undeterred. Even a high-level Sino-American agreement not to engage in commercial cyber espionage as well as multiple similar bilateral agreements with countries such as Germany and Australia resulted in only a temporary reprieve (IISS, May 2019).

18. This prevalence of China's cyber espionage also has implications for the expansion of Chinese technology companies abroad. This has become most notable in the case of the construction of the fifth generation (5G) mobile network. 5G is expected to revolutionise mobile networking, due to its

¹ For instance, in July 2020, the United States ordered the closure of China's consulate in Houston, Texas, accusing Chinese diplomats of aiding economic espionage and stealing scientific research

exponentially faster and more reliable transfer of data, thus facilitating the so-called Internet of Things. However, the issue is not the potentially transformative impact of 5G, but fears that the Chinese company Huawei – one of the leading and also cheapest providers of 5G technology – could install a digital backdoor that leaves networks vulnerable to Chinese-sponsored cyberattacks. Due to the nature of 5G networks, the vulnerability to exploitation is significantly larger than in previous mobile network iterations. The NATO Cooperative Cyber Defence Centre of Excellence asserts that Chinese technology companies are not only “subsidised by the Chinese government but also legally compelled to work with its intelligence services”. Both Huawei and its employees have been implicated in multiple cases of fraud, industrial espionage, and sanctions violations (Kaska, Beckvard, et al., 2019). In the developing world, the affordability of Chinese telecommunication investments is difficult to resist: the construction of technological infrastructure has become a key part of the so-called “Digital Silk Road” and is therefore heavily supported by the Chinese government (Kitson & Liew, 2019). Even in the developed world, many governments are reluctant to exclude Huawei from their 5G infrastructure due to affordability as well as implicit or explicit pressure from Beijing (Bennhold & Ewing, 2020). Some countries such as the UK and Germany, however, have recently taken or are considering prudent steps to restrict Chinese companies from accessing their core networks.

19. Furthermore, Beijing also has started using the “Digital Silk Road” as a means to promote its notion of “cyber sovereignty.” This includes exporting Beijing’s sophisticated digital surveillance model as well as promotion of Chinese-style cyberspace norms such as real-name registration (IISS, May 2019). China’s export of digital authoritarianism threatens the promotion of liberal democracy around the world. Additionally, China is ratcheting up its capability to manipulate public opinion abroad through digital means. While these efforts remain relatively crude, Beijing is learning fast (Cook, 2020), and could enhance its reach substantially, especially considering that advances in AI are projected to “supercharge” China’s digital manipulation efforts (Harris, 2018). Beijing’s attempts to spread disinformation and propaganda to Western audiences have provoked a backlash from the EU. In June 2020, the European Commission explicitly named China, for the first time alongside Russia, as a source of disinformation connected to the COVID-19 pandemic (European Commission, June 2020). The EU’s naming of China came at the heels of a public scandal at the European External Action Service (EEAS), which in April had to deny media allegations of toning down its criticism of China’s online activity (Apuzzo, 2020).

20. Authoritative commentators such as former US ambassador to NATO, Ivo Daalder, warn that China’s work in AI, quantum computing, and robotics will all have “huge implications” for NATO defence (Brennan, 2019). China aims to become “the world’s primary AI innovation centre” and develop a domestic AI market worth USD 150 billion by 2030. As the Assembly’s [2019 Science and Technology Committee report](#) noted, China is already rapidly closing the gap with the United States in research and application of AI. Low privacy standards compared to North America and Europe, combined with the sheer numerical advantage of the private data collected, provide a key advantage for China in developing new AI algorithms. China is actively pursuing the incorporation of AI technologies into the defence sector – both in terms of new platforms and command and control – and widely using AI for domestic surveillance and social control. In Hong Kong, law enforcement authorities can access AI facial recognition software that matches faces from any video footage to police databases (Schmidt, 2019). Additionally, AI technology has been deployed to persecute the Uyghurs in Xinjiang, and to support the expansive measures to contain the coronavirus. That said, experts also point out that China faces significant gaps in a number of areas, including AI talent, technical standards, software frameworks and platforms, and semiconductor manufacturing capabilities (Allen, 2019).

21. Quantum communication and computing are expected to have a disruptive effect on cybersecurity, such as making obsolete current US military-grade encryption. Conversely, quantum communication offers the prospect of “virtually tamper-proof” communication. Beijing has invested enormous resources in winning what some are already calling the “quantum race” (Whalen, 2019), including committing EUR 9 billion to develop a national quantum laboratory (Grand & Gillis, 2020). As a result, China was the first country to launch a quantum satellite, the first to establish a

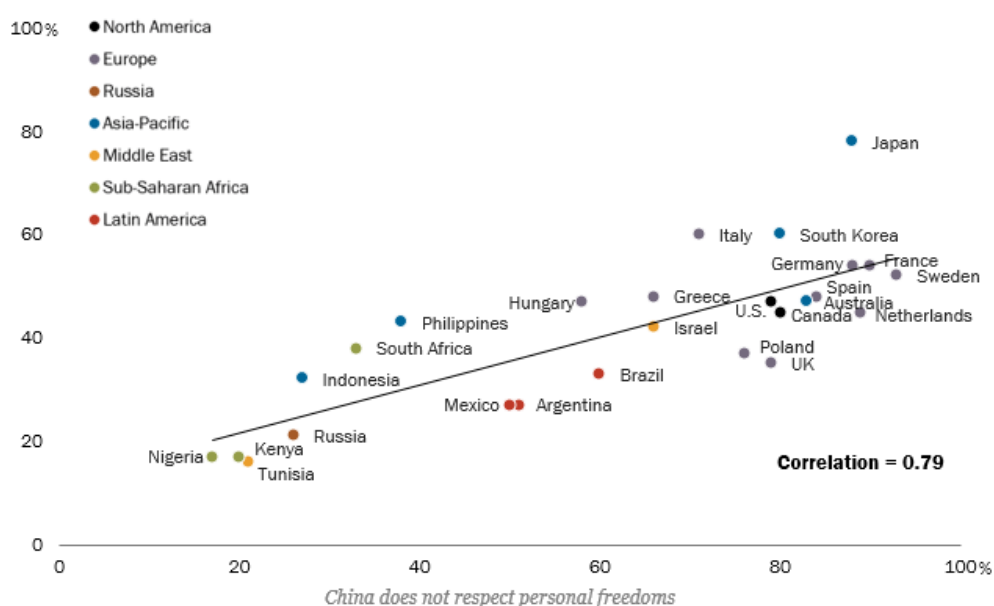
long-distance quantum communication link and has almost doubled the number of quantum technology-related patent filings compared to the United States. If Beijing were to succeed in its quest for quantum computing and communication capabilities, China could then force transparency of its adversaries' communication while safeguarding its own (IISS, February 2019). The technology has the potential to create an infinitely asymmetric technology advantage for the first country across the quantum finish line.

D. SOFT POWER AND STATE POLICY

22. Beijing projects soft power via a centrally directed top-down strategy where there is little room for independent input from private actors, let alone civil society. The Chinese government is estimated to be spending billions of dollars each year on its soft power campaign, including heavy investments in Hollywood and the video gaming industry. Among the more traditional tools of its soft power promotion are educational exchanges and the massive expansion of its foreign-language media (Albert, 2018). Beijing has established more than 550 Confucius Institutes worldwide, which are intended to promote Chinese language and culture. However, the soft power appeal of the Confucius Institutes is often overshadowed by consistent allegations that they serve as a platform for party propaganda, the monitoring of Chinese students, and the meddling in the internal politics of their host universities (Smith & Fallon, 2019). These and other efforts aimed at controlling, co-opting or outright silencing ethnic Chinese abroad have, under Xi Jinping, increasingly become the purview of the United Front Work Department (UFWD), which “is responsible for relations with the people of Taiwan, Hong Kong, and Macau, non-Communist groups, and ethnic minorities and Chinese living outside mainland China” (CRS, 2013). China views the outbreak of anti-extradition bill protests in Hong Kong, which has led to sometimes violent confrontations between protesters and the Hong Kong police force, as anti-China and aiming to bring chaos to Hong Kong by calling for self-determination and independence (CRS, 3 August 2020). The Hong Kong Special Administrative Region government and police force have used various Hong Kong laws, including the newly adopted national security law, to arrest people for their political activities, raising questions about the limits of freedom of speech and freedom of the press. Thousands of Hong Kong residents have continued to take to the streets to protest the national security law, postponed elections for a new Legislative Council and suppression of political expression, and in general the erosion of Hong Kong’s autonomy and their basic rights (CRS, January and 3 August 2020).

Negative views of China tied to perceptions of Beijing’s record on human rights

Unfavorable views of China



Source: Spring 2018 Global Attitudes Survey. Q17b & Q30a.

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23. Arguably the strongest soft power tool that China possesses is the attractiveness of its economic development model in the developing world. Accordingly, Beijing has focused on turning the BRI into a vehicle for soft-power generation. However, while investments in desperately needed infrastructure are of course welcome in most of the developing world, concerns about debt sustainability, corruption, lack of transparency and little local participation have prevented the BRI from being a decisive positive influence on China's image (SoftPower30, 2019). The same can be said for Beijing's state-directed soft power strategy in general. Despite massive investments, it has yielded mixed results around the world. In Europe, opinion on China is, on balance, negative and this view is shared by most of its neighbours in the Asia-Pacific region and in North America. Conversely, there are either pluralities or outright majorities in Latin America, Sub-Saharan Africa, and almost the entire Middle East that view China favourably (Silver, Devlin, et al., 2019). Overall, China is still only ranked 27th out of a total of 30 assessed countries in the 2019 Portland Soft Power Ranking.

Mixed enthusiasm for China across the world

Favorable views of China



Source: Spring 2018 Global Attitudes Survey, Q17b.

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E. CHINESE INFLUENCE IN GLOBAL GOVERNANCE INSTITUTIONS

24. Beijing has long been engaged in a quiet campaign to raise its profile in international organisations, and, for a long period, this was welcomed in the Western world as part of China becoming a “responsible stakeholder” in the international order. Following the withdrawal of the United States from several UN agencies and the reduction of US funding for UN programs, China has raced to fill this “global governance deficit” by increasing its funding to the UN as well as making a concerted push for leadership posts in the UN. As a result, Chinese nationals are now heading “more than a quarter of the UN Specialized Agencies” (Lee, 2019). The success of this silent campaign was demonstrated by the initial reaction of the World Health Organization (WHO) to the emerging COVID-19 pandemic, when the WHO uncritically endorsed Chinese official positions and ignored warnings from Taiwan, thereby delaying an effective international response (Godement, 2020).

25. This growing influence in the UN has raised fears that China aims to make the international system more comfortable for autocracies. Accordingly, Beijing is no longer content with just “minimising scrutiny of its human rights conduct”, it has now moved to promoting its understanding

of fundamental values. For instance, it is using the Human Rights Council as a platform to promote a Chinese understanding of national sovereignty, non-intervention, and state-directed development, while downplaying the significance of individual rights (Maizland, 2019). In fact, China has succeeded in inserting into UN documents Communist Party language such as “win-win cooperation”, “community of a shared future for mankind”, and “the democratisation of international relations” – lifted verbatim from speeches of Xi Jinping. Moreover, Beijing has used its rising clout to strengthen the international legitimacy of the BRI by enlisting the “full-throated support” of the UN for the initiative (Lee, 2019). Conversely, according to Human Rights Watch, China has used its growing economic leverage to threaten retaliation against any country willing to publicly criticise its human rights record (HRW, 2019). A similar effort is underway to increase China’s clout in other international institutions like the G20, the International Monetary Fund, and the World Bank. Where Beijing is prevented from exerting greater influence in existing forums, it sets up rival institutions like the Asian Infrastructure and Investment Bank (AIIB) or the New Development Bank (NDB) (Hart & Johnson, 2019). In sum, if Beijing succeeds in bringing about its vision of global governance, international institutions will become less rules-based and even more state-centric².

III. CHINA’S GLOBAL AMBITIONS: GREAT POWER POLITICS WITH CHINESE CHARACTERISTICS?

A. THE KEY TENETS OF XI JINPING’S FOREIGN POLICY PHILOSOPHY

26. In the post-1978 period, Chinese foreign policy was epitomised by Deng Xiaoping’s famous dictum of “hide your capability and bide your time.” Consequently, the PRC predominantly focused on its economic development, but otherwise tried to keep a low profile internationally. Although this was already changing before Xi Jinping came to power, it is under his watch that China has undergone the most radical departure from Deng’s guiding foreign policy principle (Hu, 2018). The Xi doctrine, or “Xi Jinping diplomatic thought”, as laid out in his three collected works, is comprised of three major themes, “national rejuvenation”, “global community”, and “Chinese contribution”. Chinese foreign policy frameworks emphasise a win-win collaborative approach to foreign policy but in practice China appears to be more aligned with a realpolitik approach to national power and global politics.

27. The Chinese dream of “*national rejuvenation*” is one of the most frequently invoked phrases of the current Chinese president. It implies that the domestic modernisation of China is supposed to serve as the foundation for turning the country into “a global leader in terms of composite national strength and international influence.” This is also framed as the strategy to restore China to its rightful position and finally overcome its perceived century of humiliation. The concept of “*global community*” implies a new form of international relations based on “win-win or mutually beneficial cooperation.” In his speech to the 19th Communist Party Congress, Xi also offered to the world “Chinese wisdom and a Chinese approach to solving the problems facing mankind” with special emphasis on providing assistance to developing countries.

28. Chinese officials have frequently reiterated their commitment to the “Five Principles of Peaceful Co-Existence” which, among other things, demands respect for territorial integrity and sovereignty, as well as rejecting aggression and interference in a country’s internal affairs. At the same time, they have also emphasised their commitment to the current international order and emphatically rejected the notion of China seeking hegemony. Additionally, Xi has also introduced the concept of a “correct sense of justice,” which essentially amounts to the rejection of zero-sum thinking and underscores the pursuit of the common good – even at the expense of China’s interests (Kawashima, 2019).

29. However, despite such lofty rhetoric, Beijing’s actions seem to speak a very different language. In recent years Beijing’s foreign policy has become much more assertive when it comes to defending

² For more details on this issue, see the Assembly’s 2020 Civil Dimension of Security Committee report: [China and the Liberal Global Order](#)

an ever-growing list of issues related to its “core interests” by aggressively exploiting its growing economic and military strength. This mismatch between words and deeds is most evident in China’s immediate neighbourhood, but it has also begun to impact its relations with countries around the world (Lin, July 2018).

B. CHINA AND THE UNITED STATES

30. There can be little doubt that the US-China relationship will play a decisive role in shaping the development of the 21st century. Since merely providing a detailed overview of the contentious relationship would go far beyond the scope of this report, the following section will focus on the current state of play in the economic, security, and ideological dimensions of the relationship.

31. In the past, the bilateral relationship was defined by a high degree of economic interdependence, with total trade amounting to USD 737.1 billion in 2018. In 2018, China was the United States’ third largest goods export market and largest source of goods imports (USTR, 2020). The Trump administration has since imposed or threatened tariffs on more than USD 500 billion of Chinese products in what has escalated into a trade war. Consequently, China has gone from the United States’ largest trading partner to its third-largest (Roberts, 2020). Although both sides signed a so-called phase-one trade deal at the beginning of 2020, the agreement did little to address the underlying structural issues that sparked the trade war in the first place. Instead, the core deliverable of the trade deal is a Chinese pledge to buy American goods worth USD 200 billion over the next two years (Chad, 2020), but this does not amount to much more than a temporary truce until a “phase two” trade deal can be negotiated.

32. The growing US-Chinese competition has also begun to spill over into the field of technology. In May 2019, President Trump signed an executive order that could be used to justify the termination of all Information and Communication Technology (ICT) trade and technology transfer with China on national security grounds. This is significant because the *daily* exchange value of financial services between the two countries that depend on a non-combative “global ICT environment” is equivalent to more than nine times the *annual* value of bilateral US-China trade (Austin, 2020). Overall, it could be argued that the United States has engaged in a de facto technological arms race with China, for leadership in emerging technologies such as AI, robotics, quantum, and biotechnologies. One high-visibility issue relates to the ongoing US efforts to persuade its allies and partners about the dangers of adopting Chinese 5G technology and encourages them to exclude the Chinese company Huawei from building their 5G network infrastructure. Additionally, Huawei and other Chinese companies that rely on key US components, have also been affected by export-bans prompting Beijing to intensify its efforts to establish a self-sufficient semiconductor industry (Swanson & McCabe, 2020). Another example of what is often characterised as a US-China tech war is the US decision to ban TikTok and WeChat, two messaging and video-sharing applications. The US administration argued that these companies threaten national security and pass the user data to China.

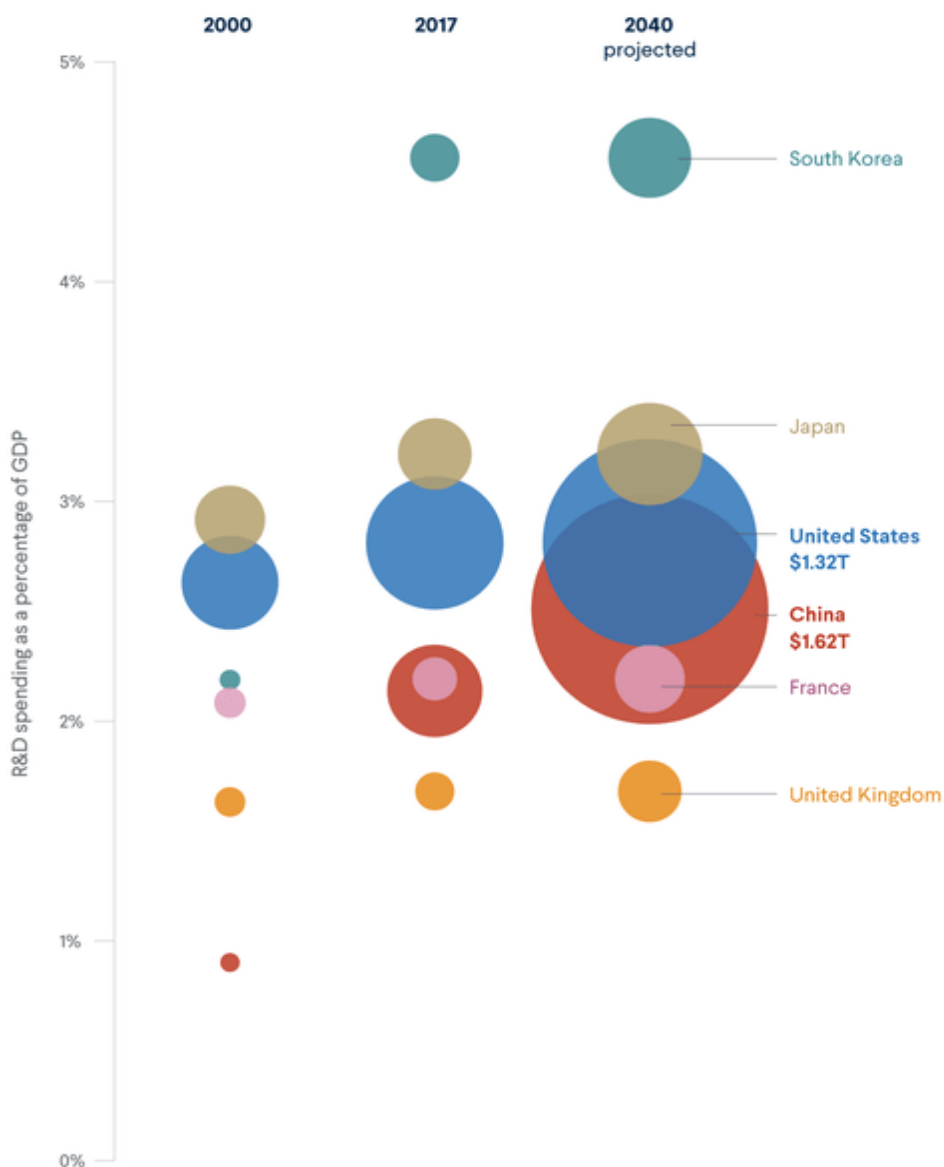
33. In many ways, framing the relationship between the United States and China as one of clashing ideologies seems almost like a relapse into the rhetoric of the Cold War. Yet, there is undeniably an aspect of systemic rivalry to the relationship even if it is now a competition between Liberal Democracy and Authoritarian Government, rather than Capitalism vs. Communism (Jones, 2020). The fundamental difference between Western and the Chinese Communist Party’s values is exemplified by Beijing’s crackdown on Hong Kong. In response to the crisis, the US administration imposed targeted sanctions against several Chinese and Hong Kong officials in August 2020 (BBC, August 2020). The need to address this and similar challenges posed by China is one of the rare points of bipartisan consensus in the United States (Hass, 2020). For example, both Republican and Democratic lawmakers gave support to a bill granting refugee status to Hong Kong residents, who risk prosecution under the Chinese territory’s new national security law (O’Keeffe, 2020). Conversely, in China, the Communist Party has been successful in fostering Chinese nationalism as a source of legitimacy for global strategic competition.

34. Despite Beijing’s efforts to become Washington’s near-peer, the United States still retains an advantage that will be very difficult for Beijing to match – namely the US system of alliances. Of the world’s 15 largest economies, 10 are firm US allies. NATO’s collective military budget exceeds that of every other nation combined. Accordingly, confronting the United States and its allies directly would be “difficult, risky and expensive for China” (Jones, 2020). Nevertheless, this still leaves the option of eroding Washington’s influence rather than confronting it. China is actively courting individual NATO and EU members, expanding its role in the developing world, and enhancing its cooperation with Russia.

Projected R&D Investment by 2040

China Projected to Outspend U.S. in R&D by 2040

Bubbles sized according to total R&D spending, which includes both public and private funds



Note: The projection assumes that R&D spending as a percentage of GDP will remain at 2017 levels for all countries except for China, whose spending is projected to increase to 2.5 percent by 2023 based on the government’s stated goal.

Source: Organization for Economic Cooperation and Development.

COUNCIL_{on}
FOREIGN
RELATIONS

C. RELATIONS WITH RUSSIA: THE DRAGON AND THE BEAR - A NEW AXIS OF AUTHORITARIANS?

35. The current trajectory of the relationship can primarily be traced back to Russia's forcible and illegal annexation of Crimea in 2014 and military invasion in eastern Ukraine. Having violated a central tenet of the post WWII order and further isolating itself from the West, Moscow has become more closely aligned with Beijing – even at the cost of being the junior partner in the relationship. The Sino-Russian relationship certainly has its benefits: the two countries share an authoritarian system of government, both perceive themselves vulnerable to Western pressure, both engage in cyber and disinformation warfare against the West and both increasingly challenge the liberal international order. While the relationship is not without its sources of friction, even experts that have long been doubtful about the potential of a Sino-Russian partnership are altering their assessment in the face of growing collaboration between the two (USCC, 2019).

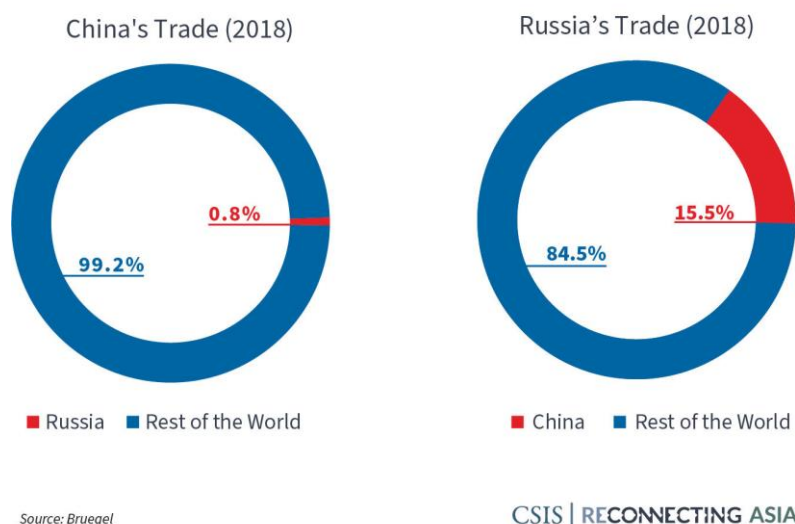
36. Military cooperation is arguably the aspect of the relationship with the longest tradition, dating all the way back to before the foundation of the People's Republic of China. Cooperation continued after the end of the Cold War with Russia becoming the sole provider of advanced weapons to China due to the post-1989 Western arms embargo (Stanzel, 2019). As a result, Russia has sold China more than 500 military aircraft, over 200 military helicopters, four destroyers and twelve submarines since 1991. Moreover, since 1991, more than 2,000 intermediate and high-ranking PLA officers have graduated from Russian military schools (Goldstein, 2020). After relatively flat weapon sales prior to 2014, the sale of modern arms once again became a major part of Moscow's strategy of forging closer ties with Beijing (USCC, 2019). Another indicator of the close military relationship is the growing number of joint military exercises, most notably *Vostok-2018* and *Tsentr-2019* (Carlson, 2018). Additionally, there is a longstanding series of China-Russia combined exercises, including the *Joint Sea* series, an annual combined naval exercise that has been conducted in the East and the South China Seas, the Baltic Sea and the Persian Gulf, and the *Peace Mission* series, a combined multilateral exercise between members of the Shanghai Cooperation Organisation, which is de facto led by China and Russia, ongoing since 2005 (Gady, 2019).

37. On the international stage, both Beijing and Moscow seek to constrain Western and especially US influence in international bodies such as the UN, where they have repeatedly cast coordinated vetoes at the Security Council. Moreover, they have also set up several common multilateral institutions such as the Shanghai Cooperation Organisation (SCO) or the BRICS (Brazil, Russia, India, China, and South Africa) grouping. Within these institutions, they emphasise non-interference in domestic affairs, push the notion of a "multipolar order" and insist on respect for the existence of "multiple value systems" specific to other nations and cultures. Arguably, there is even growing convergence when it comes to "norms and values," for instance, they are currently engaging in a coordinated effort to redefine the concept of "terrorism" to also include "activities of political opposition groups or separatist movements." China's recent approach to managing foreign NGOs on its territory also appears to have been copied from Russia. Russia passed a law on foreign agents in 2012 and a law on undesirable organisations in 2015. China followed in 2017 with its Foreign NGO Management Law (Plantan, 2017). Additionally, Moscow and Beijing also tend to share a similar perception of many global diplomatic hotspots such as Iran, Syria, Venezuela, and particularly regarding North Korea where they have even adopted multiple "joint positions." Nevertheless, neither country is interested in being dragged into the other's territorial disputes, and each generally refrains from taking a firm position on the other's territorial claims (USCC, 2019). Additionally, Russia has also been keen to foster closer engagement with several Asian countries that have strained relations with China like South Korea, Japan, India, and Vietnam – with the latter two also being important customers for Russian arms (Perović & Zogg, 2019).

38. It is in their economic relationship that collaboration, but also the growing power disparity between Russia and China, is most obvious. China has been Russia's largest trading partner since 2008 with bilateral trade rising to USD 107 billion in 2018 (Elmer, 2019). Conversely, Russia is not even in the top ten of China's trading partners, with less than 2% of Chinese exports going there. Russia provides China mainly with hydrocarbons and other raw materials, whereas China mainly

exports industrial and consumer goods to Russia. Accordingly, Chinese companies supply half of all Russian oil drilling equipment and already own 20% of Russia's liquified natural gas projects in the Arctic (Perović & Zogg, 2019). Additionally, in 2014, Beijing leveraged Moscow's weak international position into a very favourable deal on the Power of Siberia natural gas pipeline including a cheap price and partial ownership of the pipeline infrastructure (Tanas, Shiryayevskaya, et al., 2019).

China-Russia Trade Disparities



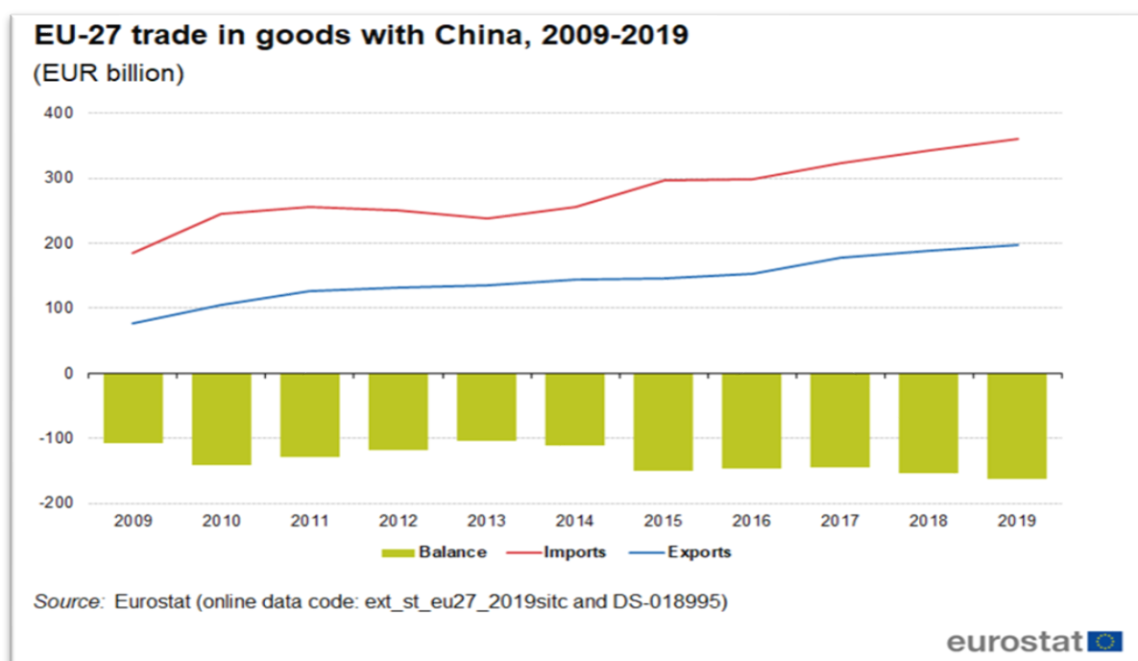
39. A particularly delicate part of the economic relationship concerns the emerging shape of the BRI in Central Asia. Although Xi and Putin have formally linked the Russian-led Eurasian Economic Union and the Chinese initiative, Russia currently only receives a very minor part of BRI investments. Primary BRI infrastructure corridors will increase China's access to Central Asian natural resources, as well as its influence in a region that Moscow has long considered its exclusive sphere of interest (Stent, 2020). Russia has long-standing cultural, linguistic, and military ties to the region and especially to the former Soviet states. Considering Russian sensibilities, Beijing has generally displayed deference for Moscow's preeminent position in the region. Thus has resulted something like a functional division of labour with China responsible for economic development and Russia remaining the region's security partner of choice (Perović & Zogg, 2019).

40. In sum, the probability of a full-blown alliance between Moscow and Beijing is not high. Nevertheless, both remain committed to a "Post-Western" world order – even if that vision differs significantly in practice. On the other hand, despite the power asymmetry and frictions in the relationship, it is also unlikely that there will be a repetition of the Sino-Soviet split.

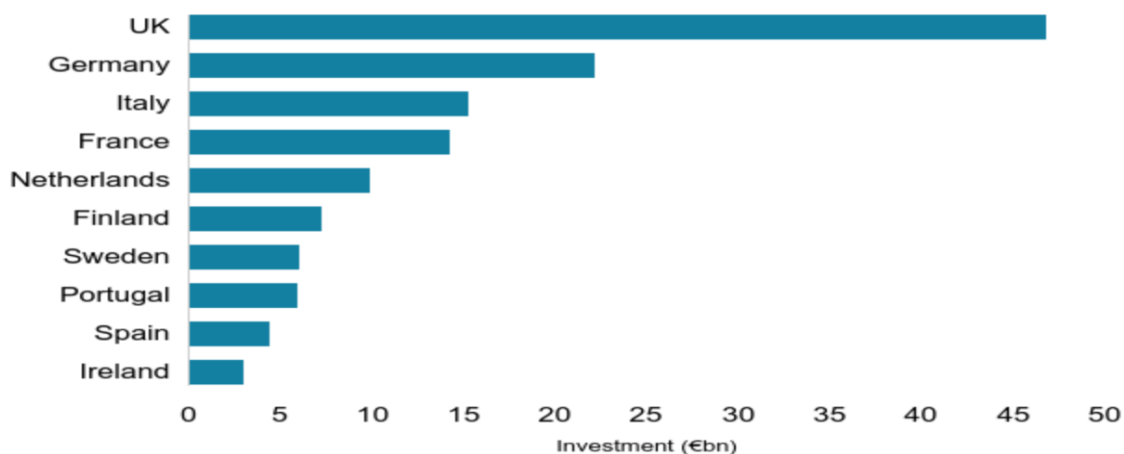
D. RELATIONS WITH THE EU

41. In its 2019 EU-China Strategic Outlook, the European Commission describes China as simultaneously being "a cooperation partner," and an "economic competitor," and increasingly a "systemic rival promoting alternative models of governance." However, the perception of China within the European institutions is increasingly shaped by the COVID-19 pandemic and mainland China's crackdown on Hong Kong. The 22nd EU-China summit in June 2020 (conducted online) brought little practical results and instead exposed widening differences between China and the EU. In July 2020, the EU's High Representative for Foreign and Security Policy Josep Borrell referred to China as a "communist country with an authoritarian regime," which is claiming the status of a world power. High Representative Borrell added that "the West was naïve with regard to China; [the West] thought that with increasing trade there would be change" (EEAS, 2020). The latter statement stood in contrast with the Western thinking of the 1990s and 2000s, whereby China's integration into the West-sponsored multilateral system would moderate Beijing's behaviour (Binnendijk, Kirchberger, Skaluba, 2020).

42. Even if there is some disillusionment with Beijing within the European institutions, the trade and economic linkages between the EU and China are enormous. In 2018, bilateral trade amounted to about EUR 682 billion, making China the EU's second-biggest trading partner after the United States. Conversely, the EU is already China's largest trading partner (European Commission, 2020). Chinese FDI still represents only a small fraction of the total foreign investments in the EU, but the strategic nature of China's investments in Europe has generated concern in Europe. Furthermore, over the years, frustration in Europe has been building over China's distorting economic practices at home and abroad, unequal market access, and forced technology transfer. Therefore, it is now European business associations and lobbies, formerly the biggest advocates of economic engagement, that are leading the charge for new EU-level capabilities to ensure protection from China's unfair trade practices (BusinessEurope, 2020). There is also concern in Europe that the phase one agreement between the United States and China is trade diversionary instead of trade enhancing and China has traditionally sought to play the United States and EU against one another.



Chinese investment by top 10 EU countries, 2000-2018



Source: Rhodium Group

BBC

43. Beyond just toughening its language, the EU has or is about to adopt a number of new tools and measures aimed at China. These measures include contributing to the establishment and/or strengthening of national foreign investment screening mechanisms to examine potential national security risks posed by certain foreign investments. There is also the so-called EU toolbox on 5G that establishes a framework and set of best practices to evaluate potential risks to European 5G networks. Under the new screening mechanism, some member states are establishing or expanding the ability to review foreign investments in critical economic areas such as energy, ports, airports, and communication networks for potential national security risks. The European Commission will then be able to request information and issue a non-binding recommendation (Hanemann, Huotari, et al., 2019). Although the new mechanism will set up minimum standards for national screening, it does not fully harmonise existing measures. Similarly, the EU toolbox on 5G provides a list of recommendations and measures for member states to ensure the integrity of their 5G networks across the EU (European Commission, 2020). Even though both of these new tools will provide for a more coordinated EU approach, it will still be up to the individual member states to make the final decision (European Parliament, 2020).

44. From the very beginning, the Brussels approach to the BRI has been cautious and so far, the EU has refused to explicitly endorse the project. Yet, almost half of the member states have endorsed it, including most notably Greece, Hungary, and Italy. From Brussels' perspective, the "17+1" initiative, which brings together 17 Central and Eastern European countries (12 EU members) and China, is even more problematic. To many in Western Europe especially, Beijing's activities in Europe are seen as an attempt to drive a wedge between the EU and Eurosceptic governments (Griffiths, 2019). Indeed, some EU members that are part of the Chinese initiatives have repeatedly blocked strong statements on Beijing's human rights violations or its transgressions in the South China Sea (Szcudlik, 2019). As one European China expert put it, "Beijing has had difficulties dealing with the EU in numerous sectors for a variety of reasons, and the incentive to try to weaken the EU's capacity to act in a concerted, unified way, is strong" (Griffiths, 2019).

E. CHINA AND THE ARCTIC: DOES THE DRAGON LOOK NORTH?

45. China's geostrategic presence in the Arctic has expanded substantially in recent years. According to its 2018 White Paper on the Arctic, China considers itself to be a "Near-Arctic State." Given that Beijing is further from the North Pole than Berlin, China's self-designation is controversial. However, it is indicative of the political, economic, and security importance the great powers have attached to the Arctic (Dams, van Schaik, Stoetman, 2020). Beijing's ambitions in the northernmost region are clearly a long-term strategic issue, which threatens to exasperate the tensions between China, Russia, and the Arctic NATO Allies. To a large extent, China's Arctic strategy is a response to climate change, with the melting ice in the Arctic potentially opening up shorter shipping routes connecting the Pacific with the Atlantic as well as making the exploitation of the region's vast natural resources commercially viable - as already laid out in the Political Committee's 2017 report on the Arctic, [NATO and Security in the Arctic](#). While the melting Arctic ice has led to heightened Chinese commercial interest, Beijing could also be motivated by the geostrategic value of the Arctic region. Unsurprisingly, there are fears that Chinese military activity could creep into the Arctic, thus undermining the Alliance's capacity to operate in a highly sensitive region (Barnard, 2020). In May 2019, the US Secretary of State warned against the possibility that the Arctic Ocean is transformed "into a new South China Sea, fraught with militarisation and competing territorial claims" (The Guardian, 2019). To prevent such a disruption, the NATO community must consider action-oriented responses to China's activities in the Arctic.

46. Despite its self-serving motives, Beijing attempts to signal benign intentions in the region through substantial investments in civilian scientific research and participating in Arctic governance, which resulted in its accession to permanent observer status on the Arctic Council in 2013. However, as an observer, China's influence remains fairly limited within the institution. Instead, it has concentrated on building-up its bilateral diplomatic and economic relationships with Arctic nations, including NATO allies. For instance, as part of the so-called "Polar Silk Road," China has focused on investments in Russia and Finland, but also Greenland (an autonomous territory within NATO

member Denmark) and another NATO Ally Iceland (Chun, 2020). The last two are also notable because Chinese investment represents a substantial percentage of their respective annual economic output. This economic dependence makes it naturally more difficult for these countries to resist Chinese efforts to construct dual-use infrastructure in strategic locations. There have already been several attempts to buy or build naval infrastructure or airports – including a bid to buy a former US naval base “suitable for surface ships and even submarines” (Auerswald, 2019). US-Denmark cooperation on financial and diplomatic initiatives in Greenland offers a useful template for further collaboration among allies to counter China’s influence in the Arctic (RFE/RL, 2020).

47. Chinese scientific projects such as multiple research stations, including the Yellow River Station in Ny-Ålesund, have increased China’s footprint in the Arctic. Navigational and satellite surveillance efforts in the region have a dual-use character (Havnes & Seland, 2019), prompting the US DoD to warn that “civilian research could support a strengthened Chinese military presence in the Arctic Ocean, which could include deploying submarines to the region as a deterrent against nuclear attacks” (DoD, 2019). Currently, there is little indication of Chinese military presence or activity in the region. Nevertheless, in Chinese (language) publications, the Arctic has been identified as a key area of future great power competition and therefore the PLA has made studying the military significance of the region a priority (Sørensen, 2019). The 2019 US Arctic Strategy Report expressed concern about the prospect of growing Sino-Russian collaboration in the Arctic. China and Russia have indeed strengthened their cooperation in the region, particularly within the framework of the Polar Silk Road, but Moscow remains wary of being marginalised in what it still perceives as its own backyard (USCC, 2019).

F. CHINA AND THE CORONAVIRUS CRISIS: THE BATTLE OF NARRATIVES AND IMPLICATIONS FOR GLOBAL SECURITY

48. When the scale of the coronavirus epidemic in China first became obvious, many analysts believed that the virus would deal a serious blow to both the legitimacy of Communist Party rule and China’s standing in the world. After all, Beijing botched its initial response to the outbreak: first covering up evidence of the new disease, then downplaying its severity – thereby likely exacerbating the global impact of the virus – and only belatedly admitting the gravity of the situation (Liu, 2020). After the government’s early missteps, Xi Jinping instituted a highly aggressive – even draconian – approach to contain the spread of the virus. At the same time, Beijing also launched an unprecedented propaganda effort aimed at domestic and foreign audiences.

49. Just as COVID-19 cases started spiking in Europe and the United States, China proclaimed its victory over the virus with the official number of new cases dropping into the single digits. Accordingly, Beijing wasted no time in launching a steady barrage of public messages, tweets, and propaganda articles in a variety of different languages to highlight China’s achievements, emphasising the effectiveness of its governance model and claiming the mantle of global leadership in the fight against what had by then become a global pandemic. While the United States demonstrated leadership in 2014-15, assembling an international coalition to tackle the Ebola outbreak, this leadership – or at least closer coordination with European allies – was lacking in the case of coronavirus. Instead, China partially filled the leadership vacuum by launching a series of online meetings and conferences with members of the “17+1” format, the Shanghai Cooperation Organisation and other regional groupings in Asia and Africa.

50. At the time of writing of this report, it is unclear how China’s early lack of transparency about the coronavirus outbreak in Wuhan will affect China’s world standing, especially as the pandemic touches every corner of the globe and is only increasing in intensity. However, the crisis has already exposed several structural issues that could benefit from further collaboration between the United States and Europe – addressing a disproportionate reliance on pharmaceutical manufacturing in China, maintaining American and European pre-eminence in medical equipment and pharmaceutical research and development, and further incorporating global health into national security operations and planning, to name a few.

IV. CHINA AS A REGIONAL PLAYER

A. UNDERSTANDING THE CHINA-NORTH KOREA RELATIONSHIP

51. The China-North Korea relationship is described by the countries' respective leaders as "immortal and invincible" or "worth more than all the gold in the world." However, the relationship is more accurately described as it was in the Political Committee's 2018 report, [North Korea's Challenge to International Security: Implications for NATO](#) – "In the case of North Korea, the People's Republic of China (PRC) has a wolf by the ear, and it can neither hold him, nor safely let him go". It is undeniable that without Mao's intervention in the Korean war (1950-1953), there would be no North Korea. China is also by far its largest trading partner, with about 80% of its trade going to or through China, and for the longest time virtually its only diplomatic partner (Zhang, 2018). But Pyongyang's pursuit of nuclear weapons is not just a threat to its adversaries like the United States, but also to a certain degree China.

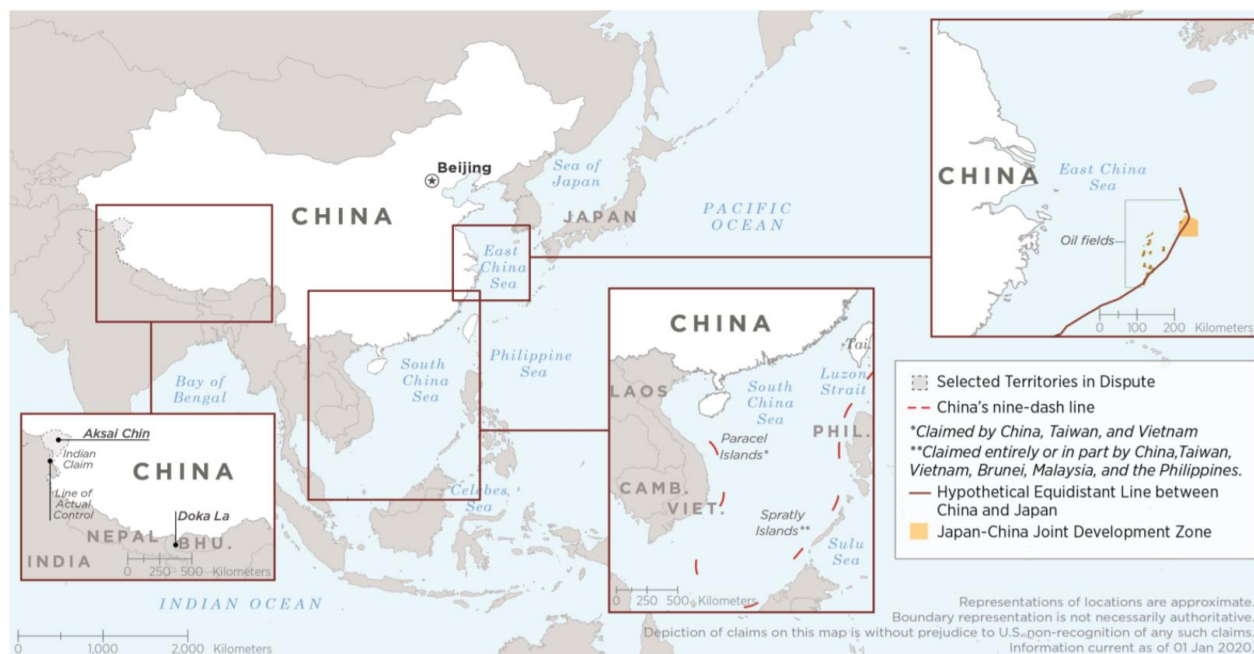
52. Beijing's North Korea policy is characterised by what Chinese officials call the three noes, "no war, no instability, and no nuclear weapons." In practice, this order also denotes the significance ascribed to each priority (USIP, 2019). North Korea serves as a buffer between the democratic South Korea, which hosts about 28,500 US troops, and China. A collapse of the Kim regime would not only create instability on China's border but could also bring a US ally and even the US military to its very border. Accordingly, while Beijing would prefer for North Korea to remain a non-nuclear power, its greatest fear is the collapse of the regime. For this reason, the Chinese government has long been reluctant to exert strong pressure on Pyongyang or fully enforce international sanctions (Albert, 2019). This changed when, after a series of nuclear and missile tests in 2016-2017, relations between North Korea and the United States deteriorated to the point where a military escalation seemed possible. Although, Chinese officials criticised the Trump administration's rhetoric, Beijing was clearly concerned about North Korea's provocative behaviour which sparked the crisis in the first place (Revere, 2019).

53. As a result, in 2017 Beijing voted in favour of four UNSC resolutions aimed at intensifying economic pressure on North Korea. By itself this would not be particularly remarkable, but what is noteworthy is that China took some steps to enforce these new UNSC sanctions and even cracked down on cross-border smuggling. This enforcement might have been a significant factor in Pyongyang's decision to seek diplomatic rapprochement with South Korea and the United States. However, while China welcomed the de-escalation of US-North Korea tensions, some in Beijing began to fear China would be side-lined in future negotiations if US-North Korea ties continued to warm. Therefore, Beijing launched a major diplomatic campaign to repair its relationship with Pyongyang, which resulted in multiple personal meetings between Xi and Kim Jong Un, but importantly also a significant easing of sanction enforcement (Wertz, 2019).

54. The bilateral relationship may not be as harmonious as official statements claim, but it has improved considerably since its most recent nadir in 2017. After all, they still have overlapping goals in the region such as reducing US influence in East Asia, weakening the US-South Korea alliance, and ideally achieving a complete withdrawal of US forces from Korea. The COVID-19 pandemic had a devastating effect on the North Korean economy – albeit the regime officially claims the absence of coronavirus cases in the country – prompting Kim Jong Un's regime to accept an even higher degree of dependence on the Chinese aid (White & Shepherd, 2020).

B. TROUBLED WATERS IN SOUTH-EAST ASIA

Selected Chinese Territorial Claims



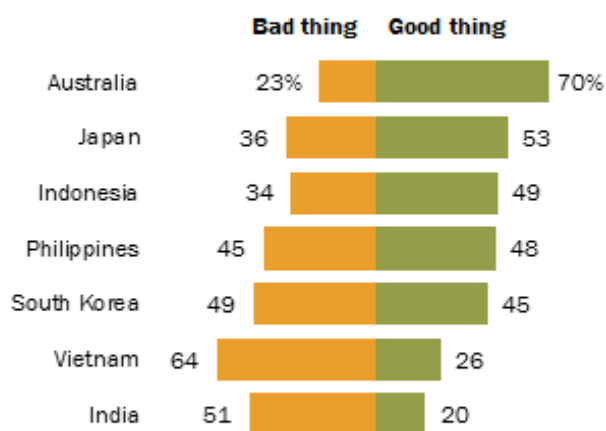
Source: US DoD

55. The territorial disputes in the South China Sea have become one of the most notable indicators of Beijing's growing assertiveness in its neighbourhood. China is actively building artificial islands in the region that infringe on the territorial claims of Brunei, Malaysia, Taiwan, Vietnam, and the Philippines. With China's island building activities and defiance of international law, the South China Sea has become the most contested body of water in the world. The Sea holds enormous quantities of oil and natural gas, not to mention its importance as fishing grounds. However, its primary strategic importance derives from the fact that many important sea lanes converge here with a third of global shipping passing through the area (CSIS, 10 October 2019). The Philippines, Vietnam, and China have been the states most actively involved in the disputes in recent years. In 2013, Manila initiated an arbitration case against China under the United Nations Convention on the Law of the Sea (UNCLOS). Beijing claims the area within the infamous nine-dash line which covers about 90% of the South China Sea. However, the nature of its claim is left deliberately ambiguous. Although in 2016, the ensuing arbitral tribunal eventually ruled decisively in favour of the Philippines, in practice Beijing has simply rejected the ruling (Heydarian, 2020), demonstrating a disregard for international law that should concern NATO.

56. International law has become an increasingly marginal aspect of the disputes (Kuok, 2019), as China has moved aggressively to establish facts on the ground. These actions have included creating artificial islands, with Beijing adding more than 3,200 acres of land to the features it claims in the Sea. At the same time, China has also continued to build up its military presence on these newly created islands, building military airfields, berthing areas, and resupply facilities as well as deploying advanced anti-ship and anti-aircraft missile systems (DoD, 2019). The primary purpose of these islands is to serve as bases for China's militarised coast guard and hundreds of ostensibly civilian "maritime militia" vessels (Poling, 2020). These ships harass, pressure, and coerce China's neighbours without the appearance of using military force. Conversely, compliant countries are offered economic assistance, investments, and other incentives. At the same time, Beijing has worked hard to keep the disputes strictly bilateral and has employed divide and conquer tactics to prevent multilateral institutions like ASEAN from taking a unified stance or greater role (Cronin & Neuhard, 2020).

Asia-Pacific publics divided on effects of China's growing economy

China's growing economy is a ___ for our country

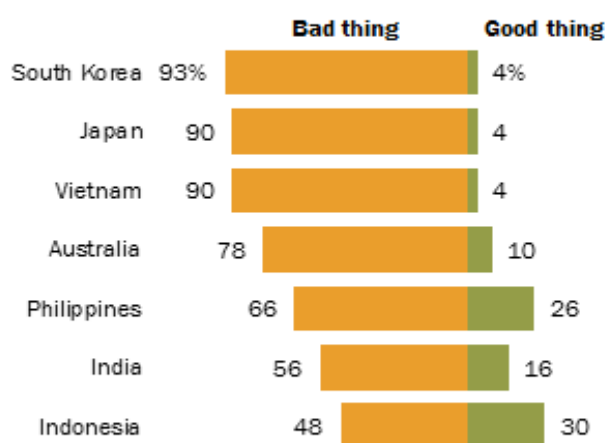


Source: Spring 2017 Global Attitudes Survey.

PEW RESEARCH CENTER

Across Asia-Pacific, most see growing Chinese military as a bad thing

China's growing military power is a ___ for our country



Source: Spring 2017 Global Attitudes Survey.

PEW RESEARCH CENTER

57. Throughout 2020, tensions were also escalating in another regional security hotspot – the decades-long standoff between Beijing and Taipei. Under President Xi Jinping, Beijing assumed a more assertive stance toward Taiwan. The PLA has been periodically flexing its muscles in Taiwan's vicinity, including sending aircraft across the median line between the mainland and the island. In response, the US also stepped up its naval presence in the region, including sending a guided missile destroyer through the Taiwan Strait. The US has also further expanded political dialogue with Taipei and disclosed the Six Assurances provided by President Reagan in 1982. The US continues to take no position on sovereignty over Taiwan, but Washington is now sending a much clearer signal of the US readiness to stand up for Taiwan in the event of a crisis. Neither the US nor China have an interest to start a military conflict over Taiwan, but experts warn that the possibility of an inadvertent incident that could set off a broader conflict cannot be ruled out (Blanchard & Tian, 2020).

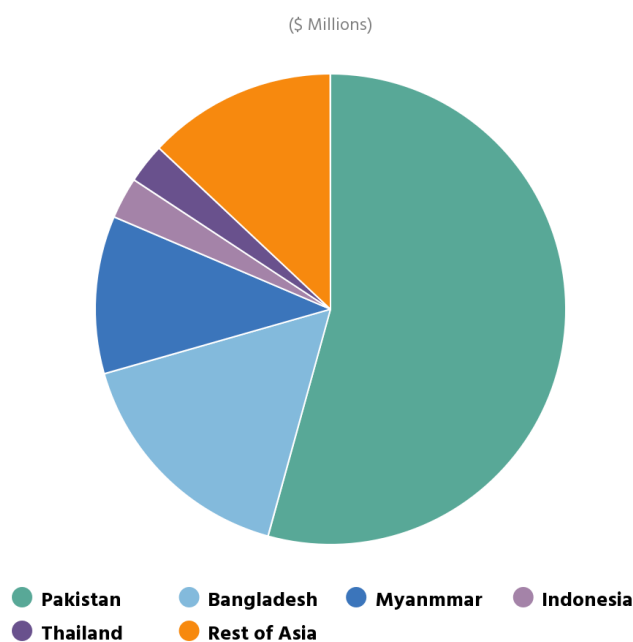
C. CHINA'S RELATIONS WITH INDIA

58. Almost four out of every 10 people in the world live in either China or India, and together they account for nearly 30% of world GDP measured on a PPP (Purchasing power parity) basis. Due to this vast scale, it is perhaps unsurprising that the Sino-Indian relationship is defined by a complex mix of competition, outright rivalry, limited hostility, but also collaboration. The most enduring challenge of the bilateral relationship is a dispute over the China-India land border. The two nations went to war over the matter in 1962 and have since engaged in multiple armed stand-offs and occasionally even outright military confrontation. This is not just an issue of historic relevance as demonstrated by the reported deaths of 20 Indian soldiers in June 2020 in the first deadly border clash between Indian and China in 45 years. The recent border clashes prompted both sides to rush military reinforcements closer to the disputed territory and prompted a wave of nationalist sentiments, particularly in India, where the government also chose to ban Chinese phone apps (Gettleman, 2020). Both countries have built up their forces in the area with tanks, artillery, and missile systems. Despite ongoing diplomatic discussions, the possibility of a breakthrough is slim given both countries' refusal to budge from the claim that the other side is responsible for risking the conflict (Kapoor, 2020).

59. At a 2018 summit in Wuhan, Chinese President Xi and Indian Prime Minister Modi attempted to turn the tide after Sino-Indian relations worsened during a 2017 standoff over the border dispute, with some success. However, the Asian giants have made little progress on resolving any of the core issues that keep them apart such as their territorial disputes, the Tibet issue, or China's close

relationship to Pakistan (Lidarev, 2020). India's deep misgivings about China's growing economic engagement in South Asia are not primarily due to the fact that the BRI runs counter to India's own connectivity strategy. Instead, New Delhi fears that an economic realignment towards China will invariably be followed by a foreign policy realignment towards Beijing – a realignment that would only benefit China's "all-weather friend" Pakistan (Kumar, June 2019). According to senior Chinese officials, Sino-Pakistani military cooperation constitutes the "backbone" of the relationship, with Pakistan receiving almost 40% of China's total arms exports from 2014-2018 (SIPRI, 2019). And Pakistan is the only country besides China with access to the more precise "military mode" of Beidou, China's position, navigation, and timing system similar to the US GPS (Abi-Habib, 2018).

Chinese Arms Exports to Asia, 2008-2018



CSIS China Power Project | Source: Stockholm International Peace Research Institute (SIPRI)

60. While Indian policymakers appear to realise that they cannot hope to compete with China's economic or military resources, even in an alliance with the West, much of India's military modernisation appears aimed at countering China. However, when it comes to international norms and practices like sovereignty, non-interference, and multipolarity, New Delhi has tended to share Beijing's views rather than those of other democracies. It should also not be forgotten, that despite their bilateral disputes, China and India have continued to cooperate in the BRICS grouping and other formats. Consequently, while NATO members should certainly try to find ways to forge a closer partnership with India, it should not be forgotten that New Delhi has its own agenda and interests that may not necessarily align with that of the West, including concerning crackdowns on human rights and minorities.

D. CHINA'S RELATIONS WITH JAPAN

61. Historically, the relationship between China and Japan has been afflicted by the unease felt in Tokyo over China's periodic sabre-rattling in the South and East China Seas, the anxiety in Beijing over Japan's partnership with the United States and, above all, China's memories of the atrocities committed by the Japanese in World War II. In terms of military power, Japan has been traditionally vulnerable and depended on American military support. Under Shinzo Abe, Japan steadfastly increased its defence budget and capabilities while purchasing American arms.

62. However, in recent decades, the world's second- and third-largest economies (in terms of GDP) have been periodically looking for ways to improve their bilateral relations. China is Japan's largest trading partner, as well as a major source of people-to-people contacts. Japan's leading firms in the automobile and electronics industries have long relied on China as a production hub and a source

of raw materials and intermediate goods. In 2018, then-Prime Minister Shinzo Abe became the first Japanese leader to visit China in seven years. Abe promised greater political and economic cooperation with Japan's neighbour across the East China sea and extended a reciprocal invitation to his Chinese counterpart Xi Jinping to visit Japan. Originally planned for 2020, Xi Jinping's state visit to Tokyo was postponed because of the COVID-19 pandemic (Rich and Inoue, 2020).

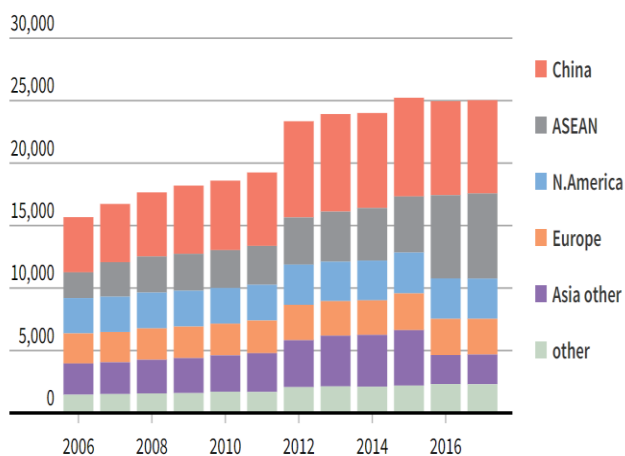
63. Throughout 2020, the nascent rapprochement between China and Japan grew increasingly uncertain. Earlier in the year, Japan's closest partners – particularly the United States – decided on a harsh stance towards Beijing's crackdown in Hong Kong, the expansion of its territorial claims in the South and East China Seas, and its handling of the COVID-19 pandemic. On some controversial issues, Japan abstained from criticising its neighbour. With regards to the Hong Kong events, Tokyo took the middle ground by merely voicing its worries, rather than explicitly denouncing China's crackdown (Nakamura, 2019). In the context of the COVID-19 crisis, both countries exchanged masks, protective gear, and other essential medical supplies. Chinese social media quickly filled with gratitude and praise of the Japanese largesse. That being said, the pandemic magnified Japan's economic and supply chain dependence on China's factories. Between 2008-2018, the number of Japanese manufacturing affiliates in China increased by 60%, reaching at least 7,400 affiliates and selling, in 2018, some USD 252 billion in goods. In June 2020, calling the dependency issue a matter of national security, Japan's policy makers agreed on a USD 2 billion stimulus package designed to shift some manufacturing back to Japan (Reuters, 2020). It remains to be seen whether the thaw in China's relations with Japan will continue. In August 2020, Shinzo Abe resigned, leaving open questions as to the future of China-Japan relations.

Japanese companies in China

China remains the most popular region for firms to set up affiliates

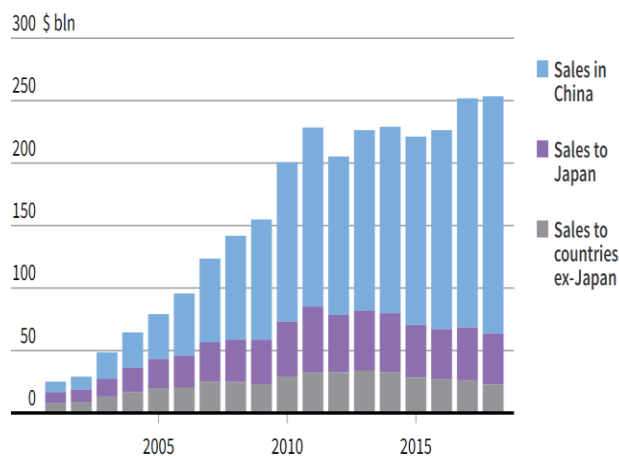
NUMBER OF CHINA AFFILIATES

The number of China affiliates peaked in 2015



CHINA AFFILIATES' SALES

Most manufacturing sales are local



'ASEAN' includes four nations through 2015, 10 thereafter

Source: Japan Ministry of Economy, Trade and Industry

Naomi Tajitsu | REUTERS GRAPHICS

V. CHINA AND NATO

64 NATO-China relations were virtually non-existent until the early 2000s. China's growing international profile provided an incentive for opening a political dialogue between NATO and Chinese diplomats in 2003, and later the militaries in 2010. NATO-China relations have never been formalised but there is regular political engagement at multiple levels:

- NATO Secretary General met with Chinese State Counsellor and Minister of Foreign Affairs Wang Yi in margins of the Munich Security Conference in February 2020.
- Since 2017, regular (approximately quarterly) meetings take place between the Deputy Secretary General and the Chinese Ambassador in Brussels. Topics discussed include arms control, disarmament and non-proliferation, North Korea, Afghanistan, and the COVID-19 pandemic. NATO Deputy Secretary Generals have visited China twice – in 2009 and, more recently, in October 2018 when then NATO Deputy Secretary General Rose Gottemoeller attended the 8th Xiangshan Forum and met with senior Chinese officials in Beijing.
- Annual High Level Staff Talks (HLST) occur between NATO and Beijing. There were 7 rounds of these talks between 2003-2013. HLST resumed again in 2019 with the latest taking place in July 2020 (via online platform).
- Regular staff talks between NATO HQ and the Chinese Mission in Brussels.

65. While NATO's engagement with China is primarily political, it is also worth noting that 5 rounds of high-level military talks took place between 2010-2018 to discuss a range of topics including North Korea, the South China Sea, maritime security and counter-piracy, security in Central Asia, and China's defence and military reforms. Military officials outlined an "action list" of possible areas for future cooperation, including participation in courses at the NATO Defense College and the NATO School in Oberammergau³, NATO participation in courses at China's Defence University, as well as enhancing information exchange between NATO and Chinese naval forces (NATO, 2018). NATO and PLA navies have conducted combined naval drills (Passing Exercise – PASSEX) and have worked to deconflict and coordinate counter-piracy missions in the Gulf of Aden and off the Horn of Africa⁴.

66. Beyond this, however, practical cooperation between China and NATO has been negligible. While China appears keen to maintain the abovementioned channels of communication with NATO, it will likely continue to prefer dealing with individual Allies on a bilateral basis. During the most recent visit of the NATO PA delegation to China, in June 2019, Chinese officials showed limited interest in broadening cooperation between NATO and China on international security issues, such as international terrorism and counter-piracy. Moreover, host country interlocutors across the spectrum did not spare NATO criticism, arguing that the Alliance only claims to be promoting international peace and security, but it really seeks to marginalise Russia and China.

67. Therefore, Beijing is wary of the Alliance's intentions to forge a common strategy vis-à-vis China and was clearly uneasy with the mentioning of China in the Declaration of the NATO leaders' meeting in London in December 2019. To mitigate media headlines that were quick to identify China as NATO's next main challenge, the Chinese foreign ministry focused on the remarks by NATO Secretary General Jens Stoltenberg that NATO does not see China as an adversary. Beijing expressed hope that "NATO will continue to foster a positive view of China and regard China as a friend and partner" (Xinhua, 2020).

68. Within the Alliance itself, the demand to focus more on China has grown considerably in recent years, but full consensus has yet to be reached. The US position has evolved as well: the Obama administration preferred a division of labour with the European Allies, expecting the latter to take on

³ Chinese officers have not used NATO's offer to attend courses at Oberammergau, but China remains keen to participate at high level NATO Defence College courses.

⁴ Mostly in 2015. PASSEX was also held in 2018 in the North Sea before Chinese forces joined the Russian Navy for a joint exercise in the Baltic.

greater responsibility for European security, thus freeing up US resources to be redirected to the Pacific. However, the changing geopolitical realities, and China's growing strategic foothold in Europe in recent years, prompted the United States to reconsider this approach and to opt for mobilising the Alliance to face the Chinese challenge. The United States strongly supported the plan to update the NATO-wide baseline requirements for telecommunications such as 5G technology that was adopted by NATO Defence ministers in October 2019 and endorsed in the London meeting in December (Belkin, 2020). It is important to note that the concern about Chinese 5G technology is shared by both major political parties in the United States: during her visit to Brussels and the NATO PA in February 2020, US House Speaker Nancy Pelosi warned European Allies about the dangers of integrating Huawei technology into Europe's 5G communication networks. Canada also largely shares the US views on China.

69. European Allies, on the whole, are beginning to recognise that NATO must address the political, defence, and security challenges posed by China. German Foreign Minister Heiko Maas noted that "China is set to become the subject of the 21st century on both sides of the Atlantic" and that "it is important to gain a better understanding of what that implies for NATO" (Tharoor, 2019). For Central and Eastern European Allies, the urgency of China's challenge is overshadowed by that of Russia, but they are prepared to support the US position in return for the latter's continued commitment to Europe's territorial defence. However, several Allies continue to view China more through the lens of economic opportunities rather than security challenges. Even the "Atlanticist" members such as the UK prefer to assume a more dovish approach. NATO Ally Turkey, like several other NATO Allies, is cooperating with China within the framework of the Belt and Road Initiative. However, Turkey also expresses its concern about China's human rights violations against the members of the Uyghur minority in China both at the bilateral and international levels.

70. In sum, NATO has taken an important first step by identifying China as a challenge for the Euro-Atlantic community. Ways of addressing this challenge is a prominent leitmotif of the NATO 2030 reflection process. However, whether, and how soon, this will translate into a coherent NATO policy remains unclear. A prominent expert, Michael O'Hanlon of the Brookings Institution, finds it unlikely that any substantial strategic decisions on China could be forged through a multilateral body such as NATO at this stage (Tharoor, 2019). Yet, your Rapporteur is convinced that the rise of China is opening a new era in international relations, and NATO Allies should redouble their efforts to respond to this challenge collectively if the Alliance is to remain relevant.

VI. OPTIONS FOR THE FUTURE: HOW TO ENGAGE, HOW TO COMPETE, HOW TO COUNTER

71. NATO Secretary General Jens Stoltenberg has said that China was "shifting the global balance of power" (Tharoor, 2019). While NATO is not in the business of searching for new enemies, it must face reality and adapt to the new strategic environment. Some argue that NATO should have no role vis-à-vis China: after all, it appears unlikely that China would execute an "armed attack" in either "Europe or North America" in the foreseeable future. However, this view neglects the fact that the North Atlantic Treaty consists of more than just the mutual defence clause laid out in Article 5. It also pledges its signatories "to safeguard the freedom, common heritage, and civilisation of their peoples, founded on the principles of democracy, individual liberty, and the rule of law" – principles that could come under threat if the rise of China proceeds unaddressed by the Alliance. The fundamental incompatibility of the Chinese Communist Party's and NATO's values was explicitly stated by Secretary General Stoltenberg: while commenting on the new national security law for Hong Kong, Stoltenberg made it clear that "China does not share [NATO's] values – democracy, freedom, and the rule of law" (Reuters, 2020). Members of the democratic NATO Alliance – which are united in their common values and interests – should be ready to counter China's malign actions.

72. There are historical precedents for NATO's engagement beyond Europe and North America. Though as NATO Secretary General pointed out, NATO as an organisation has no plans to launch an operation in the South or East China Seas. Nevertheless, just as NATO reinvented itself to

counter the post-Cold War threats of terrorism or civil conflict that occurred predominantly outside of Europe, so should the Alliance and its individual members find ways to adapt to the multifaceted rise of China.

73. This report provides the following recommendations:

Act on the London Declaration

74. While a welcome first step, the reference to China in the London declaration must be followed by a readjustment of NATO's strategic documents (such as the Strategic Concept) as well as defence planning, training, and capability development priorities. At the very least, the Allies should engage in information-sharing and joint risk assessment of China's activities that could have direct security implications for NATO, such as the Russian-Chinese military exercises in the Baltic Sea region. NATO should consider establishing a small military headquarters element in the Indo-Pacific region to facilitate information exchange and coordination of exercises and activities by Allies in the region (Brzezinski, 2020). In addition, the Allies should explore the establishment of a NATO-certified Centre of Excellence in the Indo-Pacific that could identify initiatives that allow Allies to collaborate with regional partners on shared priorities and develop both a comprehensive understanding of the challenges China poses to the Alliance and the necessary actions the Alliance must take to deal with those challenges head on. NATO adaptation to the challenges posed by China is a pragmatic necessity and not an invitation to start a new Cold War. Action, not rhetoric should be our shared priority. Furthermore, NATO should consider providing more resources and manpower to its capability to provide expert advice to members with regard to potential security implications of third-party investments in critical infrastructure. As Frederick Kempe, President and CEO of the Atlantic Council, put it after the NATO London meeting, "Now alliance leaders should replace mocking and name calling with strategic planning and purpose" (Kempe, 2019).

75. While the Alliance cannot be expected to stand up immediate and extensive operations in the Indo-Pacific, Allies could support each other – on a bilateral basis or as a part of the coalition of the willing – in missions and exercises designed to help ensure the freedom of navigation and respect for international maritime law in South and East China Seas and to reassure regional NATO partners. European Allies' maritime involvement would be a welcome example of burden sharing, in the context where the United States is continuing to invest heavily in European security. Some have proposed that the European navies send one ship to the South and East China Seas for every Chinese vessel that participates in joint exercises with Russia (Binnendijk, Kirchberger, Skaluba, 2020).

Strengthen Ties with Partners

76. For the Euro-Atlantic Community the "China challenge" is not primarily military in nature, and hopefully it will stay that way. This challenge is mostly focused in areas where the Alliance has neither strong expertise nor any regulatory competences – such as economic and technology policy as well as foreign investments. The obvious solution is to seek out partners who do. In the politico-economic regulatory sphere, the natural partner is, of course, the EU. There are high degrees of transatlantic convergence – as well as potentially promising cooperation – between the United States, Canada, and EU members around certain important topics. These include China's autocratic practices and human rights violations in Hong Kong and Xinjiang Uyghur Autonomous Region, as well as China's aggressive behaviour and global expansion in the military sphere (Binnendijk, Kirchberger, Skaluba, 2020). NATO could offer the EU enhanced information sharing when it comes to its core competencies in the fields of security analysis, risk assessment, and strategic foresight. The EU-NATO communication would be particularly desirable in facilitating a more cohesive and holistic response to China's rise, especially when it comes to Chinese investments in critical infrastructure. NATO and EU members should be talking in unison to China on these matters.

77. Additionally, NATO and its members should strengthen security cooperation with like-minded partners in the Indo-Pacific in order to uphold and safeguard global commons such as the freedom of the seas, air, space, and cyberspace. Particularly, in the case of Australia and Japan, it is time for a new joint format that includes regular consultations along the example of the intensive consultations between NATO, Finland, and Sweden. Eventually, this could also lead to enhanced intelligence sharing, joint planning, and joint exercises (Pothier, 2019).

Scope for China-NATO Dialogue

78. Despite the growing discord between China and some Alliance members, one should not lose sight of the fact that there is still scope for positive cooperation with China. For instance, even as the spread of the coronavirus has become a cause for diplomatic friction, NATO-managed cargo planes have also been transporting urgently needed medical supplies from China to Alliance members (NATO, 2020). The regular NATO-China political and military dialogue has provided a useful platform to discuss topics of mutual interest – such as arms control, military transparency, Afghanistan and North Korea – and possible areas for more practical cooperation between NATO and China (NATO, 2018). One of those areas could be public diplomacy, since there is a clearly insufficient understanding in China of what NATO is and what it does. Another area for potential dialogue between Allies and China is security implications of climate change, particularly in the context of the recent announcement by President Xi Jinping that China – responsible for 28% of global emissions – would seek carbon neutrality by 2060. The EU plans to achieve climate neutrality by 2050, while the US President-elect Joe Biden declared a US return to the Paris Agreement an immediate priority.

79. In addition to the existing communication channels discussed in the previous chapter, several authoritative figures⁵ call for a more ambitious dialogue forum to better address the multidimensional character of the relationship – namely a NATO-China Council. According to them, such a Council would not only help to align the bilateral dialogues of the 30 Allied members with Beijing but could also pave the way for a more constructive NATO-China relationship. While China would likely be reluctant to engage with the Alliance as a whole, in the end, even Beijing might come to realise that having an open communication channel with the most powerful military alliance in history could serve as an important tool for crisis and conflict prevention (Pavel & Brzezinsky, 2019). At the moment, however, the idea of the NATO-China Council does not seem realistic, not least because the de facto failure of the NATO-Russia Council discourages some Allies to set up a new, similarly comprehensive institutional framework.

Cover the Waterfront

80. As this revised report has demonstrated, the challenges posed by China's rise are not just growing, they are multiplying. China is in our midst in everything the Alliance and its members do. China is not a friendly actor. It is a malign actor. The country with the world's biggest population, second largest economy and highest manufacturing output, and second largest military by annual spending is an authoritarian state carrying out gross human rights abuses on a massive scale, including the ruthless persecution and mass imprisonment of members of the Uyghur minority, using cyber espionage and state owned enterprises to undermine private competitors in critical industries, demonstrating disregard for international law and sovereign territory, and securing for itself a massive network of global infrastructure. NATO must do more than just take note. NATO must develop the capabilities to monitor, engage, and when necessary counter the threats posed by China. This is not a burden the Alliance must bear alone, especially when the EU, national governments or other institutions are better suited to deal with specific matters. However, following the NATO Leaders Meeting in London, China is on the NATO agenda and the Alliance must act.

⁵ Including former ISAF Commander John R. Allen, former Deputy Assistant Secretary of Defense for Europe and NATO Policy Ian Brzezinski and former special assistant to the president and senior director for defence policy and strategy on the National Security Staff Barry Pavel

81. In conclusion, while revanchist Russia, terrorism, and regional instability remain, inter alia, important challenges for NATO, addressing the rise of China must become a major priority for the Alliance. China can no longer be ignored if NATO is going to remain an unsurpassed political, economic, technological, and military bloc capable of protecting the values of liberal democracy and maintaining unity among the Alliance against this shared challenge.

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