

PART II

EFFORTS TO REMAKE THE WORLD ORDER

CHAPTER 3: AXIS OF AUTOCRACY: CHINA'S REVISIONIST AMBITIONS WITH RUSSIA, IRAN, AND NORTH KOREA

Executive Summary

China, Russia, Iran, and North Korea are forging closer strategic, military, and economic ties that increase their ability—individually and collectively—to challenge the interests of the United States and its allies and partners around the world. These states share common objectives in undermining U.S. global leadership and elements of the international system that promote democracy and human rights, while seeking to reshape them to endorse autocratic rule and the use of coercion and military force to advance national interests. Although the relationships among China, Russia, Iran, and North Korea may not constitute an alliance as traditionally conceived, the partnerships allow the countries to consider the use of force, undertake provocative actions, and otherwise act in ways they could not sustain on their own. This cooperation has intensified since Russia's invasion of Ukraine in 2022, as China, Iran, and North Korea have provided Russia with political, economic, and military support to sustain its war of aggression, allowing it to circumvent U.S. and international sanctions and diplomatic pressure. As the alignment is based more on shared interests and expediency than trust and loyalty, each country may decline to assist meaningfully when counterproductive to their larger objectives, as China and Russia did after the United States struck nuclear facilities in Iran in June.

As the most powerful and systemically integrated of these countries, China has been the “decisive enabler” of this group and its destabilizing activities. By cooperating with—and legitimizing—these heavily sanctioned countries, Beijing has developed significant leverage over them, effectively casting them as junior partners in the relationship. While this dynamic has generated some underlying friction, the advantages gained from their collective power have outweighed the disadvantages. To respond to this increasing alignment among China, Russia, Iran, and North Korea, the United States must work in concert with allies and partners to deter destabilizing activities and prepare to respond to multiple potential regional flashpoints. Unfortunately, the ne-

cessity to confront this challenge has come at a time when growing divisions within many democratic societies have undermined their willingness and ability to act in a concerted fashion to resist these efforts.

Key Findings

- China, Russia, Iran, and North Korea are forging closer strategic, military, and economic ties that increase their ability—individually and collectively—to challenge the strategic interests of the United States and its allies. This cooperation is rooted in a shared desire to undermine U.S. global leadership and reshape elements of the rules-based international order, including concepts of sovereign equality, peaceful resolution of conflict, and respect for human rights. Instead, the countries seek an order that favors autocratic governance and their capacity to extend their regional spheres of influence.
- While China, Russia, Iran, and North Korea individually pose a significant threat to U.S. interests, their growing cooperation collectively magnifies the challenge. Each is emboldened to undertake actions it could not sustain on its own, and their cooperative efforts make it far more difficult to secure U.S. national security, economic prosperity, and peace and stability around the world.
- Cooperation among the “axis” countries has deepened since Russia’s full-scale invasion of Ukraine in 2022, as Russia has drawn on China, Iran, and North Korea to support its war efforts and to help it overcome the subsequent international condemnation and sanctions. For example, China-Russia bilateral trade has increased 66.7 percent since 2021. Each axis country has also benefited in different ways from its support to Moscow.
- China has played the central diplomatic, economic, and financial role in this informal alignment. These relationships have become increasingly asymmetric, with China effectively casting the others as junior partners. While this dynamic has generated some underlying friction, such tensions have largely been mitigated by shared interests and mutual benefits.
- As the alignment is based more on shared interests and expediency than trust and binding obligation, each country has freedom of action and the ability to decline to participate in a conflict. This flexibility was evident in the failure of China and Russia to provide support to Iran after the United States struck its nuclear facilities in June.
- China’s preference for flexible partnerships over formal alliances reflects its opportunistic approach to diplomacy, in which it seeks to take advantage of a relationship that serves its interests while avoiding entanglements that do not benefit it. Beijing seeks to have it both ways—cooperating closely with these partners that defy international norms and insti-

tutions while simultaneously trying to promote an image as a responsible stakeholder to the broader international community that values those norms and institutions.

- China's deepening cooperation with Russia, Iran, and North Korea raises significant concerns for Indo-Pacific security. Their coordination increases the risk of opportunistic aggression, a situation in which one regional conflict creates an opening for another actor to take advantage of the United States' diverted attention and resources to launch operations elsewhere. In a Taiwan contingency, such dynamics could force the United States to face tough choices on escalation and resource allocation. The collaboration among these powers substantially increases the risk of regional conflicts transforming into broader global crises.
- China is the major trade and investment partner for these countries, helping them mitigate the adverse effects of U.S. and multilateral sanctions. Chinese entities have been instrumental in facilitating circumvention of export controls. China's opaque financial system has been vital in money laundering and sanctions evasion by Russian, Iranian, and North Korean agents. Together, China's policies have provided a lifeline that has allowed these countries access to the resources, technologies, and dual-use equipment needed to stay in power and continue destabilizing activities.
- The sum of China's sanctions and export control evasion activities is greater than the individual components. China's role as a hub for a diverse array of countries' sanctions evasion activities effectively allows for pooling of resources and economies of scale for companies and service providers that facilitate sanctions evasion. The network effect of Chinese and non-Chinese actors creates shared learning opportunities about evasion tactics, presenting new challenges for sanctions strategy and enforcement.

Introduction

The image was striking: General Secretary of the Chinese Communist Party (CCP) Xi Jinping, flanked by Russian President Vladimir Putin and North Korean leader Kim Jong Un, striding together down the red carpet at China's September 2025 military parade, followed by Iranian President Masoud Pezeshkian and other national leaders just behind them. The moment was a carefully choreographed display intended to send a message that countries are lining up behind Beijing in solidarity with its efforts to push back against the United States and the U.S.-led world order.¹ Although this was the first time the leaders of China, Russia, North Korea, and Iran appeared together in public, the alignment among the countries has been growing over recent years. The expanding cooperation raises serious concerns about the strategic challenges these countries pose—not only individually but also collectively—to the national security interests of the United States and its allies and partners.² As the most powerful actor among them, China plays

a central enabling role, fostering coordinated strategic alignment aimed at undermining the United States and the post-World War II international order founded on the concepts of sovereign equality, peaceful conflict resolution, and universal human rights.* Even prior to the beginning of the Russia-Ukraine war, the convergence of these countries sparked debate over whether to characterize their relationships as an “axis” or a looser “partnership of convenience.”†‡ Advocates of the “axis” perspective point to trends of growing strategic coordination among these countries and their increasingly shared perception of the United States as a threat, while skeptics argue that most interactions remain bilateral and lack a formal alliance framework.

Regardless of the characterization of these relationships, the strengthening of ties among China, Russia, Iran, and North Korea represents a significant challenge to the strategic interests of the United States and its allies. These states share common objectives: to challenge U.S. global leadership, to reshape elements of the international system to be more conducive to authoritarian forms of government, and to normalize the use of coercion, military force, and the abuse of human rights. Experts argue that this partnership emboldens each actor to engage in provocative actions, believing that mutual support will help them withstand consequences. The interconnectedness among these countries can act as a force multiplier against the United States and its allies, potentially destabilizing key regions while lowering the perceived costs of confrontation for these revisionist‡ regimes. This dynamic also opens the door to opportunistic aggression, in which one actor exploits a conflict elsewhere—such as tensions over Taiwan or in Ukraine—to advance its own regional objectives while U.S. attention and resources are diverted, increasing the likelihood that a single regional conflict could escalate into simultaneous crises across multiple theaters.§

The Relationships Were Built over Decades but Deepened by the Conflict in Ukraine

China’s relationships with Russia, Iran, and North Korea are rooted in decades of engagement, although it has pursued a more coordinated and assertive alignment with these countries in recent years.

*In this chapter, the rules-based international order refers to the global system that began to emerge after 1944 out of a desire to prevent a third catastrophic war in light of the devastation wrought by two world wars in the preceding 30 years. The goal was to establish a set of rules and legal norms that, if followed, would maintain peace and security among all states. Some of these rules, including principles of non-intervention in the internal affairs of other states, territorial integrity, and the peaceful settlement of disputes, were enshrined in the UN Charter. Other rules and institutions aimed to promote free trade and economic interdependence as a means of sustaining peace, such as the Bretton Woods system, which created the International Monetary Fund, the World Bank, and the General Agreement on Tariffs and Trade, which later evolved into the WTO. Additional agreements and norms sought to articulate universal human rights, promote multilateral cooperation, and advance democracy.

†The term Axis originally referred to the World War II alliance of Germany, Italy, and Japan against the Allies. In modern geopolitics, some analysts use it to describe the informal alignment of China, Russia, Iran, and North Korea due to their shared revisionist goals; relatively high levels of cooperation, including military-related cooperation; and potential threat to the U.S.-led international order.

‡Revisionism, a concept rooted in power transition theory, refers to the strategic posture of states that are dissatisfied with the existing international order and seek to reshape its norms, institutions, and power structures, often through assertive or coercive means.

§This chapter draws upon the Commission’s February 2025 hearing on “Axis of Autocracy? China’s Relations with Russia, Iran, and North Korea,” consultations with experts, and open source research and analysis.

The China-Russia relationship grew rapidly after the Communist takeover of mainland China in 1949, followed by the Sino-Soviet split in the 1960s over border disputes and competing visions for global communism.⁴ The two countries have slowly rebuilt ties since the late 1980s, evolving into what both now describe as a “no-limits” partnership.⁵ China’s engagement with Iran accelerated during the Iran-Iraq War in the 1980s, when Beijing emerged as a key arms supplier to Tehran.⁶ Over the past decade, China has become Iran’s largest trading partner, helping Iran circumvent international sanctions aimed at isolating the country while providing crucial support to the development of Iran’s drone and ballistic missile programs.⁷ (For more on China’s support for Iran’s destabilizing activities, see U.S.-China Economic and Security Review Commission, Chapter 5, “China and the Middle East,” in *2024 Annual Report to Congress*, November 2024, 333–402.) Meanwhile, after coming to its aid during the Korean War, China formalized an alliance with North Korea in 1961 through the Treaty of Friendship, Cooperation, and Mutual Assistance, the only defense pact China maintains with any country.⁸ Despite ongoing tensions, particularly over Pyongyang’s nuclear weapons program, China has remained North Korea’s top trade partner for more than two decades.⁹

Russia’s Illegal Invasion of Ukraine Dramatically Accelerated Cooperation

Since Russia’s invasion of Ukraine in 2022, China, Russia, Iran, and North Korea have rapidly deepened their cooperation. Facing geopolitical isolation from the United States and Europe, Russia has been compelled to seek economic, military, and strategic partnerships with these countries, each of which has benefited from supporting Moscow in different ways. China has emerged as Russia’s most critical partner, playing a central role by purchasing sanctioned oil, maintaining trade and investment ties that bolster Russia’s economy, and providing dual-use technologies that enable Russia’s military aggression.*¹⁰ This support helps sustain Russia as a key actor in China’s broader strategy to challenge U.S. leadership. A Russian collapse would significantly alter the global balance of power, weakening China’s influence and strategic position.¹¹ Reflecting this concern, remarks made by China’s Foreign Minister Wang Yi to the EU foreign affairs chief during a July 2025 meeting suggest that Beijing may prefer a protracted conflict in Ukraine to keep the United States distracted from the Indo-Pacific—remarks that contradict China’s public neutrality.¹²

Iran has also seized the opportunity to strengthen ties with Russia. Notably, Iran was among the few countries that refused to condemn Moscow at the outset of the invasion.¹³ Ukrainian officials

*Analysis indicates that while the U.S. government has publicized China’s provision of dual-use components to Russia’s military, such as semiconductors, recent reporting suggests more direct military support. This includes critical minerals and chemical precursors for explosives and gunpowder, tooling machines and drone components for defense industries, and the presence of over 150 Chinese nationals fighting alongside Russian forces. Two of those Chinese nationals were captured by Ukrainian officials in April 2025 but were not officially tied to the Chinese government, although Ukraine reports that Chinese authorities are aware of mercenaries being recruited by Russia. Maria Tril, “China Provides 80% of Critical Electronics for Russian Drones, Intelligence Agency Says,” *Euromaiden Press*, May 5, 2025; Samya Kullab, “Ukraine Says More than 150 Chinese Mercenaries Are Fighting for Russia in Ukraine,” *AP News*, April 9, 2025.

have reported the use of Iranian-made Shahed drones by Russian forces, providing Iran with an opportunity to test and refine its drone and missile technologies in an high-intensity conflict against Western-equipped defenses.¹⁴ In April 2023, Ukraine shot down a Shahed-136 drone deployed by Russia and found it contained a voltage converter manufactured in China.¹⁵ Since then, Moscow has localized nearly 90 percent of its Shahed production—baseline Iranian models initially imported under a deal with Tehran—and investigators have identified more Chinese components, including transceivers, signal generators, signal converters, microchips, and antennas in Russia’s domestically produced variants.¹⁶ Maria Berlinska, head of Ukraine’s Air Intelligence Support Center and a top drone expert, cautioned that Russian-Iranian-Chinese engineering teams are carrying out “systematic, monumental scientific projects” that could significantly affect the war.¹⁷ She warned that Russia could soon deploy over 1,000 Shahed-type drones per day—exceeding the 805 used in September’s largest strike.¹⁸ This underscores the complex supply chains fueling Russia’s war effort, with Chinese technology and expertise flowing between Iran and Russia.

Meanwhile, North Korea has leveraged the war to deepen its security relationship with Russia by sending ammunition and troops while reducing its own global isolation.¹⁹ In return for military support, North Korea has received important military benefits. Not only has it been able to refine its tactics, test military equipment, and obtain experience in the contemporary battlefield environment, but it has also reportedly received advanced Russian military technologies such as short-range air defense systems and advanced electronic warfare systems as well as core modules for building a nuclear-powered submarine.²⁰ The significance of the Russia-Ukraine war is profound, marking the first time these four countries have fully converged in their strategic interests and actions in a real-time conflict. This alignment could serve as a catalyst for more coordinated cooperation in future conflicts involving any of them.

Overlapping Goals Undergird Strategic Alignment

These Revisionist Countries Share Antipathy toward the United States, Seek to Alter the World Order

Although China, Russia, Iran, and North Korea do not share a unified vision of a future world order, they are united in their dissatisfaction with the current one and see it as impeding their ability to achieve their national security goals. In their official rhetoric, these states consistently promote narratives that seek to frame the United States and its allies as hostile forces determined to contain and suppress their rise. Xi Jinping has repeatedly asserted that the United States and its allies seek “all-round containment, encirclement, and suppression,” posing unprecedented challenges to China’s development.²¹ Similarly, President Putin has accused the United States and its allies of “trying to weaken, divide, and ultimately destroy our country.”²²

This framing is used to justify efforts to undermine existing international norms and reshape them in ways that protect and promote their own governance models, which are characterized by centralized governments that lack accountability to the people, disregard

human rights, and rule by law rather than by the rule of law. In doing so, these four countries seek to legitimize their own political models and to export tools of control to create a “world safer for autocracies.”

Within this alignment, China acts as a key enabler, providing crucial diplomatic, economic, and political support that empowers these states to sustain military aggression, circumvent Western sanctions, and expand their global influence operations. Given China’s deep integration with and reliance on the global economic system, it tends to portray its efforts as reshaping existing global norms and institutions, whereas Russia, Iran, and North Korea rely more heavily on disruptive tactics—including military aggression, sanctions evasion, and nuclear proliferation—to challenge the status quo.²³

These Countries View Regime Security as a Core Interest

China, Russia, Iran, and North Korea share the fundamental necessity of ensuring the security of their regimes internally, guaranteeing the survival of their ruling elite, and safeguarding the regimes from foreign influence, domestic unrest, and ideological subversion.²⁴ These shared imperatives shape both their domestic policies and their international alignments. In China, regime security is institutionalized through the dominance of the CCP and has been bolstered in recent years by Xi’s comprehensive national security concept, which has consistently expanded the range of private and public activities treated as essential to national security and strengthened China’s internal security apparatus.*²⁵ Similarly, Russia, Iran, and North Korea regard the spread of Western democratic norms—including civil society activism and international advocacy for political freedoms—as forms of external interference that endanger their regimes’ hold on power and, by extension, their national security. This collective concern was explicitly stated in a Russia-China Joint Statement from February 2022, weeks before the invasion of Ukraine, which declared opposition to “attempts by external forces to undermine security and stability in their common adjacent regions” and pledged to “counter interference by outside forces in the internal affairs of sovereign countries under any pretext.”²⁶ The statement reflects China and Russia’s shared commitment to resisting so-called “color revolutions” and regime change influenced by values aligned with the existing international order and efforts that promote democratic values.† Through military support, diplomatic coordination, and surveillance technology sharing, China, Russia, Iran, and North Korea actively reinforce one another’s internal control mechanisms, making regime security the bedrock of their cooperation.

*For more on Chinese leaders’ increasing concerns about internal and external security, see U.S.-China Economic and Security Review Commission, Chapter 7, “China’s New Measures for Control, Mobilization, and Resilience,” in *2024 Annual Report to Congress*, November 2024, 461–462.

†“Color revolutions” refers to a series of largely nonviolent, prodemocracy movements that emerged in the post-Soviet countries and parts of the Middle East and Asia during the late 1990s and early 2000s. China and Russia use the term to describe what they claim are foreign-backed efforts to promote regime change or democratic reforms in other states, which they perceive as a challenge to sovereignty and to the existing international order. Ieva Bērziņa, “The Russian ‘Colour Counterrevolution’ Model for Containing Geopolitical Expansion by the West,” *Journal of Military Operations* 3, no. 1 (Spring 2015): 23–26; Lincoln Mitchell, “Putin’s Orange Obsession,” *Foreign Affairs*, May 6, 2022; “China’s Xi Says ‘Color Revolutions’ Must Be Prevented,” *Voice of America*, September 16, 2022.

These Countries Seek to Assert Control and Influence over Regional Spheres

China, Russia, Iran, and North Korea all seek to establish regional spheres of influence, viewing U.S. alliances and partnerships as major obstacles to their ambitions. Each country aspires to dominate its immediate neighborhood and rectify perceived historical injustices. China aims to assert primacy in the Indo-Pacific while Russia endeavors to reassert control over Eastern Europe and Central Asia and revive its Soviet-era level of global influence. Iran seeks to expand its influence across the Middle East, and North Korea aims to reshape the security dynamics on the Korean Peninsula in its favor.²⁷

China seeks to become the preeminent power in the Indo-Pacific and eventually the world. China perceives the United States' military alliances and forward-deployed forces in Japan, South Korea, Guam, and Australia as a direct threat to its ability to assert authority in the Indo-Pacific region, including its broad and unsubstantiated maritime claims and claims over Taiwan.²⁸ In the South and East China Seas, China has built artificial islands, militarized disputed features, and rejected international legal rulings in an effort to solidify control over vital maritime routes and counter U.S.-led security cooperation with countries like the Philippines and Japan.²⁹

President Putin has a neo-imperial vision of Russian power, viewing the areas controlled by the former Soviet Union as properly within Russia's sphere of influence. Accordingly, he has bristled at the westward orientation of Russia's former satellites—especially their integration with NATO and the EU. Moscow has repeatedly used military aggression to enforce its vision of its sphere of influence, as seen in Georgia in 2008, Crimea in 2014, and the war in Ukraine since 2022.³⁰ These actions reflect a broader goal of reversing what Russia views as the strategic losses of the post-Cold War order.

Iran similarly views itself as a major Middle East power. The U.S. alliance with Israel and the U.S. role as the architect and enforcer of Iran's international isolation are obstacles to its ability to reassert itself throughout the Middle East. Tehran views its support for terrorist organizations and violent actors—such as Hezbollah in Lebanon, various militias in Iraq, the Houthis in Yemen, Hamas in Gaza, and the former Assad regime in Syria—as essential tools for projecting power and countering rival states, particularly Saudi Arabia and Israel.³¹

North Korea seeks to undermine the U.S.-South Korea alliance and establish itself as the dominant power on the Korean Peninsula. It uses nuclear weapons development, ballistic missile testing, and periodic military provocations to pressure regional actors, enhance deterrence, and consolidate the Kim Jong Un regime's internal legitimacy.³²

In sum, these revisionist countries view U.S. security guarantees, military presence, and diplomatic networks as significantly constraining their ability to reshape their respective regions on their own terms. China, Russia, Iran, and North Korea's cooperation is underpinned by the overarching goal of safeguarding their authoritarian regimes from perceived external and internal threats. These regimes seek to weaken U.S. alliances and challenge global norms such as free elections, human

rights, and freedom of expression that threaten their political models. By framing external criticism as foreign interference, they invoke nationalism to justify repression and consolidate control at home under the guise of defending national sovereignty.

China Sees Geopolitical and Strategic Benefits from Cooperation with Authoritarian States

Through its support for Russia, Iran, and North Korea—and other authoritarian states around the world—China extends its geopolitical influence, secures strategic footholds in critical regions, and strengthens a shared resistance against U.S.-led political and security structures.

China's backing of Moscow in the Russia-Ukraine war is driven, at least in part, by the concern that a weakened or collapsed Russia would not only generate regional instability but also undermine China's vision of a multipolar world and eliminate a key strategic partner in opposing U.S. dominance.³³ This calculus shapes China's continued support for Putin's regime—through facilitating sanctions evasion, providing economic lifelines, supplying dual-use goods that fuel Russian military aggression, and amplifying anti-Western narratives across international platforms. China also derives significant strategic advantage from the prolonged U.S. engagement in the Russia-Ukraine war as it diverts U.S. attention away from the Indo-Pacific and stretches U.S. military, financial, and diplomatic resources across multiple major geopolitical fronts.

Since the 1979 Islamic Revolution, China has had an interest in supporting the regime in Iran, which has seen the United States as a persistent threat to its internal stability, citing U.S. support for opposition groups, economic sanctions, and “maximum pressure” campaigns as attempts to destabilize the regime.³⁴ China views the Iranian regime as strategically advantageous for its continued access to Iranian energy resources and as a partner to balance against U.S. influence in the Middle East.³⁵ China uses the narrative of U.S. overreach and instability in the Middle East (e.g., the wars in Iraq and Afghanistan and U.S. support for Israel) to burnish its image as a responsible non-interventionist, stabilizing power and to appeal to developing countries in the region.

China's support for the Kim regime aligns with a longstanding strategic objective dating back to the Korean War: to maintain North Korea as a buffer state between China and U.S.-aligned South Korea, preventing hostile forces and U.S. weapons from being deployed on its border.³⁶ Despite ongoing tensions over Pyongyang's nuclear program, Beijing has consistently prioritized regime stability in North Korea to safeguard this strategic barrier.

China, Russia, Iran, and North Korea Cooperate Multilaterally in Various Ways

Cooperation to Counter Global Economic and Financial Sanctions

As countries subject to various economic and financial sanctions imposed by the international community, Russia, Iran, and North Korea have a shared desire to establish financial linkages and trad-

ing networks beyond the reach of U.S.-led sanctions. To this end, they have sought to build economic networks that, over time, could serve as viable alternative trade and payment channels.* Though not currently subject to such broad-based sanctions, China has previously been sanctioned, currently hosts numerous entities subject to financial sanctions, and more generally has an interest in weakening the effectiveness of sanctions. In supporting countries subject to such sanctions, China advances multiple objectives, including undermining U.S. foreign policy, enhancing the capacity of its own sanctions evasion systems in light of its substantial future sanctions risk, and promoting alternative global economic systems that are less reliant on the dollar and increase the prominence of China's currency.

China's facilitation and coordination of alternative trade and payment channels have enabled a growing network of actors engaged in evasion schemes to achieve economies of scale by more efficiently accessing financial services and buyers.³⁷ For example, China facilitates networks consisting of middlemen commodity buyers and small independent oil refineries that purchase sanctioned items or oil transported by a shadow fleet of vessels that purposefully hide their movements.³⁸ Small regional Chinese banks largely siloed from the dollar-based financial system most often facilitate payments on behalf of buyers, while large Chinese financial institutions connect to these small regional banks, thereby providing a conduit to international currency markets via Hong Kong or other financial hubs.³⁹ Finally, front companies controlled by—or acting on behalf of—sanctioned regimes tap into this expansive system of evasion by conducting business with Chinese entities, whether witting and unwitting.⁴⁰ (For more on China's facilitation of sanctions and export control evasion, see Graham Ayres and Lyndi Tsering, "China's Facilitation of Sanctions and Export Control Evasion," *U.S.-China Economic and Security Review Commission*, November 2025.)

Many front companies acting on behalf of Iran, Russia, and North Korea operate out of Hong Kong, given the city's emergence in recent years as a major hub for sanctions evasion. The official stance of Hong Kong authorities is that they will not enforce sanctions other than those implemented by the UN Security Council, and they have become increasingly uncooperative with U.S. authorities in light of growing pressure and influence from Beijing.⁴¹

The network effects, resource sharing, and level of coordination among actors in China, Russia, Iran, and North Korea, as well as in third-party countries like the United Arab Emirates (UAE), present added layers of complexity in targeting the nodes of these networks. According to testimony before the Commission by Kimberly Donovan, director of the Atlantic Council's Economic Statecraft Initiative, disrupting these complex transnational money laundering schemes requires substantial resources and information sharing across government and with partner countries.⁴² She argued that while this can create a "whack-a-mole"

*For more on China's alternative cross-border payment systems, see U.S.-China Economic and Security Review Commission, Chapter 7, "China's New Measures for Control, Mobilization, and Resilience," in *2024 Annual Report to Congress*, November 2024, 482–487.

solution, these efforts are nonetheless effective in imposing costs and inefficiencies on the intended target.⁴³

At a strategic level, the involvement of Chinese financial institutions with significant global interdependencies in sanctions evasion activities makes it more difficult for the United States and allies to ratchet up enforcement through escalatory actions like secondary sanctions.⁴⁴ Secondary sanctions restrict non-U.S. persons from transacting with a primary designated entity through the threat of being denied access to the U.S. financial system.⁴⁵ Broadening the use of this powerful extraterritorial mechanism could potentially ensnare Chinese financial institutions with significant international business, exposing foreign and U.S. clients to risk.⁴⁶

China Has Broadened Its Military Cooperation

Since Russia's invasion of Ukraine, military cooperation among China, Russia, Iran, and North Korea has intensified significantly in both scale and scope. While China's military support to these revisionist countries remains primarily bilateral, these states have increasingly sought to expand their cooperation to trilateral and multilateral levels. One of the most notable examples of this growing alignment is the series of trilateral naval exercises—referred to as the Maritime Security Belt—conducted in the Gulf of Oman and the Indian Ocean by China, Russia, and Iran. These exercises began in 2019 and have continued annually, though China did not participate in 2020 and 2021.^{*47} In mid-March 2025, the three countries held their joint naval exercise near Chabahar, Iran.⁴⁸ This year's drills marked a notable upgrade in scale and complexity—including simulated attacks on maritime targets, antipiracy operations, inspections and detentions, and possible joint electronic warfare operations. During the exercises, the British military reported Global Positioning System (GPS) interference in the Strait of Hormuz, likely caused by intentional jamming by one or more of the participating countries.⁴⁹ This disruption, while not definitively linked to joint electronic warfare, suggests growing sophistication in their capabilities and highlights the potential for coordinated electronic operations aimed at undermining adversary systems. Such disruptions are especially concerning in a congested chokepoint like the Strait of Hormuz, where even a temporary loss of navigational reliability can endanger civilian shipping.⁵⁰ Although North Korea does not regularly participate in multinational military exercises, South Korean officials reported that former Russian Defense Minister Sergei Shoigu proposed trilateral naval drills with North Korea and China in 2023.⁵¹ While analysts generally assess that interoperability among these militaries remains low, the increasing frequency and sophistication of trilateral exercises—particularly among China, Russia, and Iran—should not be underestimated.⁵² These developments reflect a deepening alignment and a shared intent to challenge U.S. maritime dominance and that of its partners in strategically vital regions.

*China did not participate in the exercises in 2020 and 2021, likely due to pandemic-related disruptions, although the drills continued with Russia and Iran.

Continued Cooperation on Weapons Sales, Export Control Evasion, and Space Issues

Beyond multilateral exercises, these countries have strengthened their cooperation over the years in other critical military domains, such as weapons and materiel support. China, Russia, Iran, and North Korea are all subject to export controls on both weapons and dual-use items necessary for modern military systems. These revisionist countries rely on one another to varying degrees to supply weapons and gain access to dual-use goods. For example, China has played a key role in supporting Iran's military modernization—despite international sanctions—by transferring military technology and indirectly supplying small arms and cruise missiles through third-party channels, including countries like North Korea.⁵³ In April 2024, Britain's Royal United Services Institute reported satellite imagery showing a U.S.-sanctioned Russian cargo ship, *Angara*, docked at Zhoushan Xinya Shipyard in China.⁵⁴ *Angara* was transporting thousands of containers believed to contain North Korean weapons and ammunition.⁵⁵

In addition to direct weapons sales, these revisionist countries support one another through the provision of dual-use goods and export control evasion. Jake Rinaldi, a defense analyst at the U.S. Army War College, testified to the Commission that as China has become more sensitive to reputational risks of direct arms sales to Iran and North Korea, it has shifted its military cooperation toward technology sharing and sales of dual-use products.⁵⁶ In addition, Dr. Rinaldi's testimony cited China's role in more clandestine or covert export networks operating through third-party countries and intermediaries.⁵⁷ This indirect support was illustrated in 2023 when Chinese-manufactured dual-use components were found in Iranian Shahed-136 drones, which were subsequently used in Russia's attacks against Ukraine.⁵⁸ Chinese dual-use parts, including components used in Russian guidance systems, various kinds of microelectronics, and engine components, have flowed through third-party countries or been routed via Russian payments processed through intermediaries in Hong Kong, Kyrgyzstan, Kazakhstan, and the UAE.⁵⁹ These channels help obscure the origin and destination of sanctioned goods, enabling China to support Russia's war efforts while avoiding detection and giving it the ability to claim plausible deniability. A significant amount of the trade between China and Russia involves militarily sensitive dual-use items identified on the Common High Priority List (CHPL), a designation used by the United States, the EU, Japan, and the UK.⁶⁰ The CHPL includes items such as microchips for weapons guidance, ball bearings for tank production, and other critical components.⁶¹ Russia's reliance on China

*As of February 23, 2024—the most recent publicly available update—the U.S. Department of Commerce's Bureau of Industry and Security lists 50 items on the CHPL. Tier 1 items of highest concern include a broad range of electronic integrated circuits used in precision-guided weapons systems for which Russia has no domestic production capacity; Tier 2 items include electronic components Russia can produce but prefers to source from the United States and partners and allies; Tier 3.A includes electronic components with a broad range of suppliers; Tier 3.B includes mechanical and other components such as ball and roller bearings, airplane and helicopter parts, optics, navigation equipment, etc.; Tier 4.A includes manufacturing equipment for electronic components; and Tier 4.B includes Computer Numerically Controlled (CNC) machines and components used in mechanical and metal manufacturing. U.S. Department of Commerce, Bureau of Industry and Security, *Common High Priority List*, February 23, 2024.

for these high-priority goods rose sharply from 32 percent in 2021 to 89 percent in 2023, indicating the dramatic growth in defense industrial cooperation.⁶²

These countries also cooperate in the space domain. In 2022, Putin and Xi signed agreements to promote interoperability of China's BeiDou and Russia's GLONASS satellite navigation systems and to jointly construct, operate, and maintain BeiDou and GLONASS ground stations, calling for mutual compatibility and data sharing between the two systems.⁶³ The previous year, Iran and China had signed an agreement granting Iran access to the BeiDou system, which could be used for military applications.⁶⁴ Iran could use the BeiDou system to improve targeting accuracy, select launch locations, and carry out more sophisticated ballistic and cruise missile strikes as well as enhance the precision and coordination of unmanned aerial vehicles.⁶⁵ Experts have also assessed that North Korea has adopted the GLONASS system for its missile tests.⁶⁶ According to testimony from Jemima Baar, an independent China analyst, given the shared use of BeiDou and its increasing interoperability with GLONASS, China, Russia, Iran, and North Korea could enhance real-time intelligence sharing, secure communications, and battlefield awareness in the event of a conflict.⁶⁷ This interoperability could enable these countries to conduct operations with greater speed, precision, and strategic depth across multiple theaters and domains, making it more difficult for the United States and its allies to intervene and contain conflicts.

Advancing Autocratic Governance through Coordinated Action in International Institutions

China, Russia, Iran, and North Korea have coordinated actions in a systematic campaign in the UN and other international institutions to reshape global norms to legitimize and promote authoritarian governance and preferred international norms relating to human rights, territorial sovereignty, economic development, and the governance of critical technologies.⁶⁸ Their strategies have included building blocs within these bodies to obstruct activity, creating parallel power structures, and selectively reinterpreting key documents to serve authoritarian ends. In the UN Human Rights Council, for example, China and Russia have played leading roles in the Like-Minded Group, a coalition of states that has worked to weaken international human rights protections and shield members from criticism over domestic crackdowns.⁶⁹ Similarly, in 2021, China, Russia, Iran, and North Korea joined other authoritarian-leaning states in launching the Group of Friends in Defense of the UN Charter, an 18-member bloc that uses the language of international law to subvert it—using concepts like unilateralism and noninterference to provide a façade of multilateral legitimacy to justify destabilizing activities and repression.⁷⁰

China and Russia have also leveraged their permanent seats on the UN Security Council to shield partners from accountability. Following North Korea's 2022 intercontinental ballistic missile launch, both countries vetoed a resolution to impose additional sanctions, breaking a 16-year precedent of sanctions for North Korea's missile tests and preventing the Council from responding to Pyongyang's

destabilizing activities.⁷¹ Moreover, they have systematically undermined UN monitoring capabilities—Russian representatives succeeded in dismantling the panel of experts charged with monitoring sanctions enforcement on North Korea in 2024 after continual years of efforts by Chinese and Russian appointees to undermine the panel’s credibility.⁷²

A similar pattern is evident in their support for Iran. Both China and Russia were original supporters of the Joint Comprehensive Plan of Action (JCPOA), the 2015 multilateral agreement aimed at limiting Iran’s nuclear capabilities in exchange for sanctions relief. However, following the U.S. withdrawal from the deal in 2018 and Iran’s violations of its commitments, China and Russia consistently blocked accountability measures, framing such measures as illegitimate or politically motivated while providing diplomatic cover for Tehran’s nuclear escalation.⁷³ In June 2025, the International Atomic Energy Agency’s 35-nation Board of Governors again called on Iran to fulfill its legal obligations and comply with its nuclear commitments, citing five previous resolutions to the effect between 2020 to 2024.⁷⁴ Collectively, these efforts pose a significant challenge to the integrity and credibility of the international system. By undermining institutions intended to promote transparency and accountability, prevent conflict, and protect human rights, China, Russia, Iran, and North Korea are working to reshape multilateral norms to protect authoritarian interests. If left unchecked, their cooperation risks normalizing impunity for aggression, proliferation, and human rights abuses, which represents one of the gravest long-term threats to international stability.

Creating Alternative International Institutions: BRICS and the Shanghai Cooperation Organization

Beyond undermining existing institutions like the UN that it regards as favorable to the U.S.-aligned world order, China has led the effort to establish alternative international power structures more conducive to authoritarian governance and its preferred international norms, including BRICS and the Shanghai Cooperation Organization (SCO). (For analysis of developments over the last year in BRICS and the SCO, see Chapter 2, “U.S.-China Security and Foreign Affairs (Year in Review).”)

China played a leading role in establishing what became known as BRICS in 2009, envisioning it as a counterweight to the G7 and a key forum to broaden its influence among nations of the “Global South.” The ten countries* now in BRICS represent roughly half of the global population and 27.2 percent of global gross domestic product (GDP).†⁷⁵ The organizational structure of BRICS remains largely informal, with no shared charter or common funds. The group operates on a consensus-based approach, with each member country hosting and serving as chair to set priorities on an annual rotating basis.⁷⁶ With the admission of Iran in 2024, BRICS provides an avenue to offset Iran’s isolation in other international organizations.

*BRICS is an intergovernmental organization founded by five major emerging economies—Brazil, Russia, India, China, and South Africa—formed to promote mutual economic, political, and development interests of developing countries. The group has since expanded to include Egypt, Ethiopia, Iran, Saudi Arabia, and the UAE.

†China accounted for 61.8 percent of the combined GDP of the ten BRICS members.

BRICS has been used to oppose UN condemnation of Russia's war in Ukraine, develop a common position on Iran's nuclear program, and explore an alternative international financial system to reduce reliance on the U.S. dollar.⁷⁷ During the Commission's February 2025 hearing, witnesses concurred that BRICS thus far has had limited effectiveness as a multilateral bloc.⁷⁸ However, they noted it may provide a forum for leading revisionist members China, Russia, and now Iran to seek to promulgate international norms, and it could facilitate the incremental construction of alternative international systems, such as payment channels that, while not likely to fully replace incumbents in the short run, do warrant continued monitoring.⁷⁹

The SCO, established in 2001 by China and Russia with three Central Asian states, now has nine members, including India, Pakistan, and Iran.⁸⁰ Although its institutional structure is weak and members have divergent interests that limit its ability to enforce collective action, recent developments suggest that member states are beginning to align more closely.⁸¹ What began as a regional security bloc in Central Asia has since evolved into a broad political, economic, and technological organization aimed at counterbalancing U.S.- and Europe-led institutions. In September 2025, the SCO summit provided a high-profile platform for a unified anti-American gathering among the axis counties. At the summit, Xi introduced the Global Governance Initiative (GGI), seeking to position China as a leading voice and provider of an alternative governance framework for developing countries in regional and global institutions. While still nascent, Beijing's concept paper indicates that the GGI is intended to shape global norms and establish standards aligned with China's preferences.⁸² Out of that summit also came a commitment to establish an SCO development bank to function as another multilateral lending instrument, but one serving otherwise isolated axis states and outside the reach of U.S. sanctions.⁸³

The SCO also conducts recurring drills like Peace Mission and the Interaction-2024 exercise in Xinjiang, which provide a platform for China, Russia, and Central Asian countries to deepen military coordination and gain training experience in areas such as air-ground combat operations, long-distance mobilization, stability maintenance operations, conventional warfare, and drone testing.⁸⁴ Moreover, mechanisms like the SCO's Regional Anti-Terrorist Structure (RATS) support intelligence sharing and cross-border surveillance but have also been used to suppress dissent and target minorities under the guise of counterterrorism.⁸⁵ These activities underscore the SCO's positioning as an alternative security framework aligned with the strategic priorities of China and Russia while also cultivating closer security and political relationships with developing countries.⁸⁶

Drawing on the Authoritarian Toolkit: Building Influence through Technology and Information Control

Exporting Repression: Surveillance Technologies, Digital Control, and Policing Practices

These revisionist countries also seek to reshape international norms through the global export of surveillance technologies and digital control tools that enable repression and strengthen author-

itarian governance. Increasingly, China is extending its reach by promoting domestic control through the export of its surveillance technologies, policing practices, and internal security models—not only to Russia, Iran, and North Korea but also to a wider range of countries across Africa, Southeast Asia, and elsewhere.⁸⁷ According to testimony from Christopher Walker, vice president at the Center for European Policy Analysis, these exports include facial recognition systems, AI-driven monitoring platforms, digital ID systems, and centralized data management systems.⁸⁸ Mr. Walker highlighted that countries like Pakistan, Venezuela, and Uganda have adopted these technologies, often with Chinese state-backed firms' assistance in building surveillance infrastructure through the Digital Silk Road initiative.⁸⁹ China promotes its Digital Silk Road strategy as a model of governance that equates political stability with centralized control over information.⁹⁰ Chinese AI surveillance systems have been deployed in over 80 countries, supporting initiatives like urban "safe cities," social credit registries that blacklist individuals, and policing platforms designed to preemptively monitor dissent.*⁹¹

Other "axis" countries pursue similar efforts. Russia has also played a key role in exporting tools of digital authoritarianism. It has provided "cybersecurity" systems and surveillance software to regimes such as Belarus and Venezuela, enabling these governments to monitor opposition activity, control public discourse, and restrict access to independent information.⁹² Iran has also likely supported the development of Venezuela's cyber defense and censorship systems in exchange for financial gains to fund military activities.⁹³ While North Korea is less involved in the export of such technologies, it is a heavy domestic user of Chinese surveillance tools.⁹⁴ These include biometric data collection—such as fingerprints and photographs—used to monitor its population.

China also has used efforts such as its Global Public Security Cooperation Forum (GPSCF), formerly known as the Lianyungang Forum, to deepen international cooperation on law enforcement and public security.⁹⁵ The GPSCF is an annual summit organized by China's Ministry of Public Security (MPS) and serves as a platform to "showcase the PRC's [People's Republic of China] vision of global public security cooperation and advanced law enforcement technologies, including facial recognition software and drones."⁹⁶ In recent years, the forum has attracted delegates from more than 120 countries, regions, and international organizations.⁹⁷

In addition to these multilateral initiatives, China maintains sustained bilateral internal security dialogues with Russia, Iran, and North Korea. China also uses internal security partnerships to protect its overseas interests by serving as tools for monitoring the diaspora and conducting transnational repression. Moreover, internal security cooperation allows China to build influence within recipient governments and potentially develop leverage for political coercion.† Collectively, these patterns represent a coordinated effort by China, Russia, Iran, and North Korea to develop and sustain authoritarian

*Recent data show that two Chinese firms—Hikvision and Dahua Technology—account for roughly one-third of the global surveillance camera market. "Mapping More of China's Tech Giants: AI and Surveillance," *Australian Strategic Policy Institute*, November 28, 2019.

†See Chapter 4, "Crossroads of Competition: China and Southeast Asia" for a deeper discussion of this issue.

governance in other countries by providing tools and training that promote information control and repression and challenge global standards of privacy, transparency, and human rights.

Shaping the Narrative: Propaganda, Disinformation, and Malign Influence

Additionally, China, Russia, Iran, and North Korea have stepped up coordination on information operations and psychological warfare to control narratives and shape public perceptions about events. These campaigns aim to legitimize authoritarian rule by spreading false or misleading narratives about adversaries, discrediting internal dissent, and glorifying regime achievements.⁹⁸ The central goal in the information environment—as in their efforts more broadly—is to reinforce their domestic control and undermine trust in U.S. global leadership while they reshape elements of the international system to legitimize aggression, coercion, and the repression of dissent. A key tactic in these efforts is the mutual amplification of state-sponsored content. For example, since the start of the Russia-Ukraine war in 2022, Russian state media and affiliated actors have actively pushed disinformation, portraying Russia as a victim of NATO aggression, denying war crimes, and framing the invasion as a “liberation” of Russian-speaking populations.⁹⁹ These narratives are often echoed by Chinese, Iranian, and North Korean state outlets, which reframe Russian talking points for domestic audiences and sympathetic governments across the developing world. Chinese media frequently reshare Russian narratives or the purported failures of Western democracies.¹⁰⁰ Iranian outlets cite Chinese sources to underscore claims of U.S. economic decline or global instability, while Russian media platforms reinforce North Korean denunciations of U.S. military exercises.¹⁰¹ This coordinated disinformation effort reinforces anti-Western messaging, lending credibility to otherwise fringe or fabricated claims. Together, these coordinated information campaigns form a non-kinetic front in global strategic competition. By manipulating digital spaces, revisionist regimes seek to spread authoritarian narratives, erode international rules and norms, and reshape global discourse in their favor.

China Has Sought to Balance Strategic Partnerships with the Desire for Global Legitimacy

China has downplayed the existence of a bloc with Russia, Iran, and North Korea and has sought to carefully manage the perception of its relationships to minimize reputational risks and maintain plausible deniability. China has long been skeptical of formal alliances, rooted in concerns about the so-called “entrapment dilemma”—the risk of being drawn into defending another country’s security interests at great cost to its own.¹⁰² Historically, Chinese leadership has publicly favored flexible “partnerships” that allow it to maintain autonomy and adapt to shifting global dynamics without being constrained by fixed obligations.¹⁰³ This strategy also reduces the risk of entanglement in external conflicts that could jeopardize China’s broader strategic interests. China’s engagement with countries like Russia, Iran, and North Korea is guided by the caveat that China seeks to ensure support does not interfere with its other priorities,

such as maintaining stable relations with the EU, Gulf states, or East Asian neighbors.

This cautious approach is evident in China's handling of the June 2025 Israel-Iran conflict, which highlights the limits of its strategic partnerships. Despite Iran having signed a new strategic partnership with China in 2021 and one with Russia in early 2025, neither country came to Iran's assistance when its nuclear facilities were bombed by Israel and the United States in June. While both countries publicly condemned the attacks and called for a ceasefire, neither country offered to provide actual support to Iran such as advanced weaponry or the replenishment of its air defense architecture destroyed in the strikes.¹⁰⁴ Although the strategic partnership agreements did not include mutual defense pacts, they did call for increased defense cooperation, and Russia had agreed to provide Iran with advanced weaponry in 2023 and 2024.¹⁰⁵ Analysts have speculated on a variety of reasons for the restraint—for example, Russia being overextended in Ukraine and China not wanting to disrupt ongoing trade talks with the Trump Administration or its broader economic interests. In any event, the failure to act may indicate limits to the robustness of the partnerships among these countries.

China's restraint during the Israel-Iran conflict, as well as its careful positioning in the Russia-Ukraine war, underscores a broader effort to resist being portrayed as the leader of an "axis" of authoritarian states. Beijing deliberately avoids framing its partnerships in opposition to democracies, recognizing that international discourse often portrays such regimes as illegitimate, repressive, and inferior to democratic governments.¹⁰⁶ Another reason China has avoided the "axis" label is that it risks justifying NATO expansion and deepening alignment among its rivals.¹⁰⁷ Chinese leadership's reluctance to be closely entangled with Russia, North Korea, and Iran also reflects a desire to avoid reinforcing the Western narrative that China is forming a Cold War-style bloc. At the 2023 Shangri-La Dialogue security forum, for example, former Defense Minister Li Shangfu condemned efforts to build NATO-like alliances in the Asia Pacific, stating that "in essence, attempts to push for NATO-like [alliances] in the Asia-Pacific is a way of kidnapping regional countries and exaggerating conflicts and confrontations, which will only plunge the Asia-Pacific into a whirlpool of disputes and conflicts."¹⁰⁸ Instead, Beijing has emphasized its opposition to exclusive alliances and "zero-sum thinking" and sought to present itself as a constructive, inclusive leader on the world stage, seeking to build a "community of common destiny" and a "shared future for mankind."¹⁰⁹

Despite its public commitment to a multipolar international system, China's behavior suggests a clear preference for hierarchical, asymmetric relationships with itself at the center. This tendency is evident in the rollout of major foreign policy initiatives such as the Belt and Road Initiative (BRI), the Global Development Initiative (GDI), the Global Security Initiative (GSI), the Global Civilization Initiative (GCI), and the Global Governance Initiative (GGI). These efforts cast China as the principal architect of a reimagined international order, one in which Beijing defines the rules and sets the terms of engagement. In short, China's vision of multipolarity

serves as a strategic instrument: a means to expand its own influence while reducing the leverage of the United States and its allies on the global stage. These frameworks are not designed to foster genuinely equal partnerships but rather to reinforce China's leadership by extending economic, security, and ideological benefits in a top-down fashion.

China's Bilateral Relations with Russia, Iran, and North Korea

China's Partnership with Russia

China's partnership with Russia has been more robust and institutionalized than those with Iran or North Korea and has deepened in recent years in response to what both governments perceive as escalating geopolitical threats to their regimes. Their relationship has evolved from a bond rooted in communism in the early Cold War years to a more complex relationship driven by shared geopolitical goals and strategic alignment against the United States. Both Xi Jinping and Vladimir Putin view their partnership as a counterweight to the international order favoring the United States, regarding one another as powerful partners capable of offering mutual political, economic, military, and technological support. Even in the absence of a formal military alliance, the two countries continue to cooperate closely through coordinated joint statements, joint military exercises, and sales of weapons and technology. Their relationship has deepened in recent years in response to external pressures: Russia's invasion of Ukraine and China's intensifying trade war with the United States have pushed them to bolster their strategic alignment. While both countries emphasize that they are priority ("no limits") partners rather than formal allies, military and economic cooperation remains a significant aspect of their partnership.¹¹⁰

Xi's visit to Moscow in May 2025 for the Victory Day Parade commemorating the 80th anniversary of the end of WWII in Europe marked his 11th visit to Russia since becoming president in 2013. In late August–early September 2025, President Putin reciprocated by traveling to China to attend the SCO summit and the military parade celebrating China's WWII victory, signaling his strong support for China's leadership and deepening China-Russia relations.¹¹¹ Xi and Putin have met more than 40 times, the highest number of meetings between Xi and any world leader.¹¹² Amid rising tensions with the West—ranging from the U.S. imposition of tariffs on Chinese goods to continued pressure on Russia to end its war in Ukraine—Xi and Putin used the occasions to convey the durability of their partnership. Their May 2025 joint statement and press conference emphasized the "unique strategic value" of their relationship and reaffirmed their status as "priority partners" and "friends of steel."¹¹³ The statement also reaffirmed Russian support for the PRC's claim over Taiwan and called for addressing the "root causes" of the Russia-Ukraine war, an endorsement of the Kremlin's preferred rhetoric concerning the conflict.¹¹⁴ In another joint declaration titled "Joint Statement by the People's Republic of China and the Russian Federation on Global Strategic Stability," China and Russia criticized U.S. military initiatives, including the "Gold-

en Dome” proposed by President Donald Trump in January 2025, that is designed to counter growing missile threats, particularly from adversaries like China and Russia.¹¹⁵ The statement claimed that the United States was “turning outer space into an environment for placing weapons and an arena for armed confrontation” and creating a “strategic offensive arms [race].”¹¹⁶ They emphasized that China and Russia were committed to the “peaceful use of outer space.”¹¹⁷ This statement is hypocritical, given that both countries have conducted destructive anti-satellite tests that created significant debris hazards and destabilized space security.¹¹⁸ China and Russia’s joint statements, alongside observable increased military cooperation, underscore how shared grievances toward the United States have strengthened their partnership.

China, Iran, and North Korea Fuel Russia’s War Machine

Russia’s invasion of Ukraine has accelerated the convergence of materiel and technological support among China, Russia, Iran, and North Korea. Although these countries do not operate under a formal joint command structure or multilateral coordination mechanism, they have increasingly supported each other’s strategic interests through bilateral arrangements. Key examples of support to Russia include:

- *China:* Since Russia’s illegal 2022 full-scale invasion of Ukraine, Russia has become heavily dependent on China economically, technologically, and diplomatically, which is why NATO labeled China a “decisive enabler” of Russia’s war effort.¹¹⁹ This dependency has provided Beijing greater leverage to shape the terms of cooperation to its advantage, reinforcing its role as the senior partner. Beijing has become a critical economic and technological lifeline for Moscow, particularly through the export of dual-use products. Reports indicate that over 70 percent of Russian imports of semiconductors and 96 percent of secure microchip or “smart” cards—which are used in a variety of civilian and military applications—come from China.¹²⁰ Beijing has also provided technical assistance to strengthen Russia’s satellite and space-based capabilities and provided satellite imagery to Russia to help it track Ukrainian troop movements.¹²¹ Additionally, as a key supplier to Iran’s drone program, China indirectly has bolstered Iran’s support for Russia, as discussed below.
- *Iran:* Tehran has delivered offensive Shahed-136 drones, short-range ballistic missiles, and ammunition to Russia, and it reportedly deployed paramilitary personnel to Crimea to train Russian troops in operating these drone systems.¹²² In return, Iran has received advanced conventional weapons from Russia, including fighter aircraft and attack helicopters.¹²³ Iran’s own military may benefit from observing the performance of its equipment and associated tactics on Ukrainian battlefields.¹²⁴

China, Iran, and North Korea Fuel Russia's War Machine— *Continued*

- *North Korea:* North Korea's military support to Russia has been ongoing since at least mid-2023 and has continued since then, expanding to include direct military involvement.¹²⁵ Pyongyang has supplied Russia with ammunition, equipment, and ground forces, using the war as a testing ground for its military hardware, doctrine, and training.¹²⁶ Russia, in turn, has supplied North Korea with short-range air defense systems, sophisticated electronic warfare technology, and key components essential for constructing a nuclear-powered submarine.¹²⁷ North Korea has also supplied Russia with ballistic missiles and launchers that have been used in the war against Ukraine. By early 2025, Pyongyang had transferred 148 KN-23 and KN-24 ballistic missiles to Russia, which have struck Ukrainian targets on the battlefield.¹²⁸ Moreover, reports indicate that North Korea has sent around 14,000 troops to augment Russian forces fighting in Ukraine, with these forces deployed and fighting in the Kursk border region.¹²⁹ Following a meeting between Russian Security Council Secretary Shoigu and Kim Jong Un, North Korea announced in June 2025 that it will send thousands of military construction workers and deminers to carry out reconstruction in Russia's Kursk region.¹³⁰

Looking ahead, the outcome of the war in Ukraine will likely shape the form and intensity of future cooperation among these four countries, though not its strategic direction. Experts argue that an outcome where Russia emerges triumphant would expose the limits of Western resolve, emboldening this network of authoritarian countries to more forcefully challenge U.S.-led norms and institutions.¹³¹ Conversely, if Russia ends the war weakened or isolated, experts assess that China may scale back its overt support to avoid secondary sanctions or reputational damage.¹³² However, this would likely shift the relationship into more covert or informal channels rather than dismantle it.¹³³ In either scenario, the underlying strategic factor uniting Beijing and Moscow—their shared desire to resist perceived U.S. hegemony—is unlikely to be meaningfully altered.

China-Russia Security Cooperation: Extensive and Expanding

The China-Russia military partnership took root in its current form in the 1990s when the People's Liberation Army (PLA) became a major purchaser of Russian military hardware, but it has since evolved into much more extensive and strategic military cooperation, particularly after 2014. China's acquisition of Russian air defense systems, fighter jets, and air-to-air missiles significantly enhanced its military capabilities and served as a basis for its domestic weapons production.¹³⁴

Arms Sales Involve Increasingly Sophisticated Weapons Systems

From the 1990s to 2024, Russia was China's leading foreign arms supplier, accounting for approximately \$38.5 billion in known weapons sales—equivalent to 77 percent of China's total arms imports during that period.¹³⁵ Although Russia had previously limited the transfer of its most advanced military technologies in order to preserve its military technology edge, since Russia's 2022 invasion of Ukraine, Moscow has become increasingly reliant on China and has acquiesced to sharing some of the crown jewels in its arsenal.¹³⁶ In recent years, Moscow has exported more sophisticated systems to Beijing, including the Su-35 multi-role fighters and S-400 surface-to-air missile systems.¹³⁷ Russia may also be sharing sensitive submarine technologies with China, including those supporting improvements to the nuclear propulsion plant of its next-generation Type 096 ballistic missile submarine (SSBN).¹³⁸ If true, this could pose a major challenge to U.S. naval posture and anti-submarine warfare strategies.

Beyond direct sales, Russia and China have announced cooperation on the joint production of weapons, including heavy-lift helicopters and missile early warning systems.¹³⁹ However, according to Elizabeth Wishnick, a senior research scientist at the Center for Naval Analyses, this cooperation generally involves Russia “supplying a particular component or software” to China rather than joint production.¹⁴⁰ At the same time, China has sought to reduce its reliance on foreign military suppliers, including Russia, by investing heavily in its own domestic defense weapons production.¹⁴¹

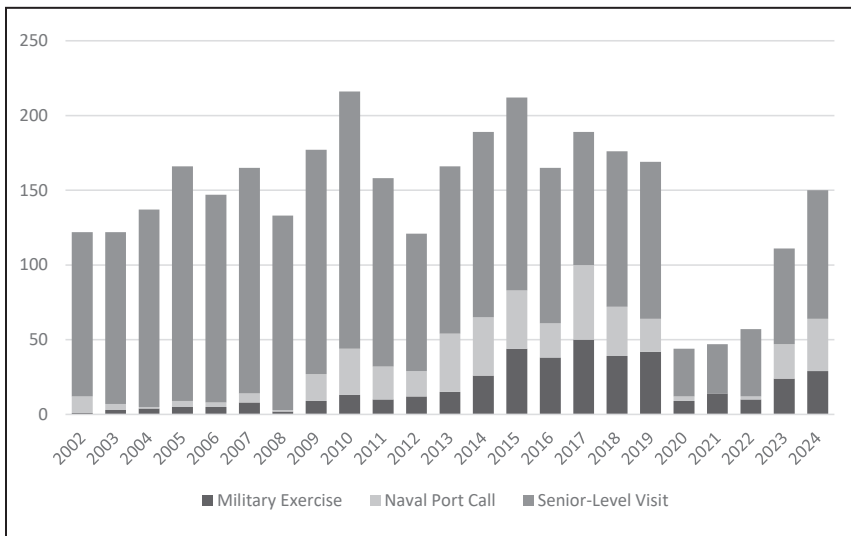
More recently, China's cooperation with Russia has centered on supplying “dual-use” systems and technologies, particularly in the electronics sector, to help Moscow replace key components previously sourced from Ukraine and the West. As noted above, analyses indicate that in 2023, China accounted for 89 percent of the CHPL items needed for Russia's war effort in Ukraine.¹⁴² According to Oleh Ivashchenko, the head of Ukraine's Foreign Intelligence Service, at least 20 Russian defense plants have received machine tools, gunpowder, chemical products, and other components from Chinese suppliers.¹⁴³ Mr. Ivashchenko also said that Russia's aviation sector has obtained “equipment, spare parts, and documentation” from China and that 80 percent of the “critical electronics” used in Russian drones came from China.¹⁴⁴ In July 2025, European officials reported that Chinese firms have been covertly shipping engines to Russia's weapons manufacturer IEMZ Kupol under false labels to evade sanctions, enabling the increased production of Garpiya-A1 attack drones used against both military and civilian targets in Ukraine.¹⁴⁵ China has also supplied nitrocellulose, a key ingredient in gunpowder and rocket propellant manufacturing, to support Russia's munitions production, including artillery shells.¹⁴⁶ Russian companies have become more reliant on China as a source of precision machine tools, such as computer numerically controlled (CNC) machines, and often obtain them indirectly through intermediary countries such as Belarus and various Central Asian nations.¹⁴⁷ (For more on China's facilitation of sanctions and export control evasion, see Graham Ayres and Lyndi Tsering, “China's Facilitation

of Sanctions and Export Control Evasion,” *U.S.-China Economic and Security Review Commission*, November 2025.)

Military-to-Military Cooperation Expands

Since Russia’s 2014 annexation of Crimea and ensuing geopolitical isolation, China-Russia military exercises have increased markedly in frequency, scale, and operational complexity, incorporating a broader range of combat and combat support activities (see Figure 1). According to data from the National Defense University, 63 percent of all recorded China-Russia military interactions over the past 23 years occurred between 2014 and 2024, underscoring a significant intensification of bilateral military engagement.¹⁴⁸ In their 2025 joint statement on the Comprehensive Strategic Partnership of Coordination for a New Era, Beijing and Moscow reaffirmed their commitment to deepening defense ties, expressing their intent to further deepen military mutual trust and cooperation, expand the scale and scope of joint military exercises, regularly organize joint maritime and air patrols, strengthen exchanges and cooperation under bilateral and multilateral frameworks, and promote China-Russia military cooperation to a higher level.¹⁴⁹ For instance, intelligence reports indicate that around 600 Chinese troops will train at Russian military installations in 2025, gaining exposure to combat tactics used against NATO-equipped forces.¹⁵⁰

Figure 1: Frequency of China-Russia Military Diplomacy Activities, 2002–2024



Note: The decline in China-Russia military diplomacy activities between 2020 and 2022 was primarily due to COVID-19.

Source: Phillip C. Saunders and Melodie Ha, “Chinese Military Diplomacy,” *National Defense University*, June 2025.

In September 2025, the Royal United Services Institute, a British think tank, reported documents revealing deals dating back to 2023 in which China supplied dual-use items to Russia in exchange for Russia equipping and training a Chinese airborne battalion and

sharing its battlefield expertise in airdropping armored vehicles.¹⁵¹ These exchanges indicate that Beijing is moving beyond symbolic joint drills and public statements and deepening military cooperation with Moscow to strengthen its power-projection and air maneuver capabilities, including in ways that would be useful if it chooses to attack Taiwan.

China and Russia have significantly expanded the complexity and geographic scope of their joint air and naval patrols in recent years. In August 2025, they held Joint Sea Exercise 2025 in the Sea of Japan, followed by a 15-day joint naval patrol.¹⁵² According to Chinese state media, the drills included “submarine rescue, joint anti-submarine, air defense and anti-missile operations, and maritime combat.”¹⁵³ Japan’s national defense white paper, published the previous month, warned that the growing tempo of China-Russia military operations near Japan poses a “grave concern” for its national security.¹⁵⁴ These joint patrols are both symbolically and strategically significant, as they usually take place in proximity to disputed areas or sensitive sea lanes and have tested the readiness and response protocols of the United States, South Korea, and Japan. For example, in July 2024, the Russian and PLA navies conducted a joint patrol near the United States for the first time, with their aircraft entering into Alaska’s air defense identification zone (ADIZ).¹⁵⁵ Similarly, in November 2024, Chinese and Russian aircraft conducted joint exercises from the Sea of Japan to the East China Sea and entered South Korea’s ADIZ without prior notice.¹⁵⁶

Despite the growing frequency and geographic reach of these joint operations, however, many experts assess that true interoperability between Russian and Chinese forces remains limited.¹⁵⁷ Both militaries face enduring challenges stemming from their respective military cultures, their independently developed command and control (C2) systems,* and their limited experience conducting joint operations with foreign partners.¹⁵⁸ Hence, experts point to the largely scripted nature of drills, suggesting they may be as much about political signaling and confidence building as genuine operational integration.¹⁵⁹ While these limitations currently constrain China-Russia military cooperation, they could ultimately be overcome if Xi and Putin perceive a significant deterioration in the international security environment that compels deeper collaboration in combined military operations.

Additionally, there are indications that China and Russia may be cooperating on gray zone activities, with the disruption of under-sea cables frequently raised as a notable potential example. (Gray zone activities, including cable cutting, are discussed in Chapter 2,

* Command and control (C2) systems are critical for countries seeking to achieve joint interoperability, serving as the backbone for coordination, communication, and decision-making across units, services, and countries. Both Russia and China face ongoing challenges with their respective C2 systems, which have hindered their ability to coordinate effectively even within their own military branches and theater commands. Reports from the Russia-Ukraine war indicate that Russia’s Soviet-era C2 structure was overly rigid, outdated, and disorganized, hindering battlefield adaptability and coordination. The PLA has undertaken C2 reforms, especially after 2015, to improve jointness and streamline its theater command structure, but analysts note continued shortcomings in joint operations and real-time decision-making. U.S. Department of Defense, *Summary of the Joint All-Domain Command & Control (JADC2) Strategy*, March 2022, 7; Matthew Loh, “NATO Can’t Ignore the Russian Military’s Faster, More Dangerous Kill Chain,” *Business Insider*, April 28, 2025; Jasmin Alsaied, “The People’s Liberation Army’s Command and Control Affects the Future of Out-of-Area Operations,” *Journal of Indo-Pacific Affairs* (March–April 2023): 148.

“Security and Foreign Affairs Year in Review” and Chapter 11, “Taiwan.”) European officials reported that a Chinese-flagged vessel was present near the sites of two undersea cable-cutting incidents in the Baltic Sea and noted possible Russian involvement.¹⁶⁰ In October 2023, Finnish authorities identified a Chinese-flagged vessel, *New-new Polar Bear*, which had Russian sailors on board, as the ship that severed the Balticconnector gas pipeline and a telecommunications cable linking Finland and Estonia.¹⁶¹ In another incident in November 2024, the Chinese-owned bulk carrier *Yi Peng 3* cut two critical undersea data cables while dragging its anchor along the Baltic seabed for more than 100 miles—one connecting Sweden and Lithuania and the other linking Germany and Finland.¹⁶² The vessel was carrying Russian fertilizer and was crewed by a Chinese captain and at least one Russian sailor. European authorities from Denmark, Sweden, and Germany who have been investigating the incident suspect the sabotage was orchestrated by Russian intelligence services, not the Chinese government.¹⁶³ These incidents have heightened European suspicions that Chinese commercial vessels may be covertly enabling Russian gray zone operations and posing threats to critical European infrastructure.

In a potential Taiwan contingency, Russia may likely mirror China’s approach to the Ukraine war by providing indirect military and economic support while avoiding direct involvement. According to then-Director of National Intelligence Avril Haines, China and Russia have conducted joint military exercises related to Taiwan, prompting the U.S. Department of Defense to increase planning for a potential conflict involving both countries.¹⁶⁴ Experts anticipate that Russia’s support could take the form of stepped-up energy supplies, dual-use technology, battlefield expertise, cyber capabilities, and missile defense cooperation.¹⁶⁵ Russia’s contributions would enhance China’s warfighting capacity while allowing Russia to avoid the political and economic consequences of direct engagement.¹⁶⁶ Strategically, Russia would stand to gain from the United States being preoccupied in the Indo-Pacific, a factor that could influence its calculus on taking action to advance its interests elsewhere.

China-Russia Economics and Trade: Symbiotic, though Heavily Asymmetric

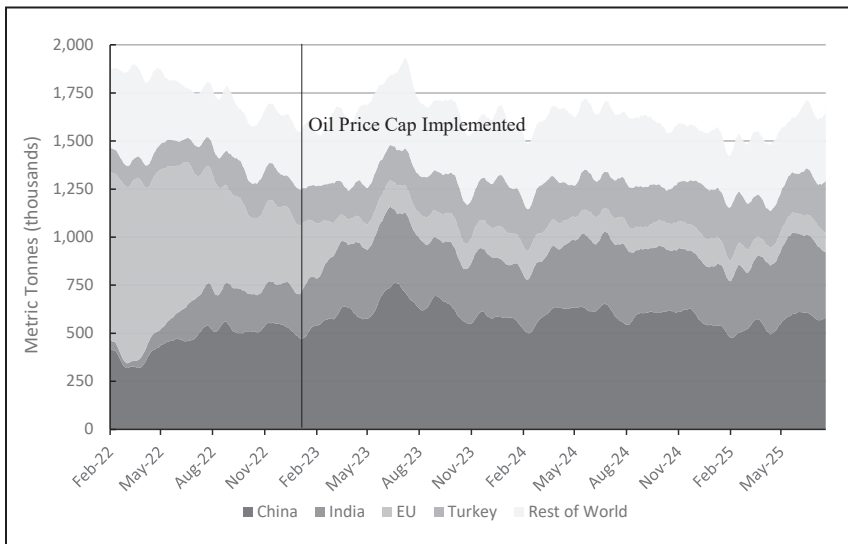
China has played a pivotal role in helping Russia’s economy withstand the broad-based economic sanctions and evade export controls that would otherwise limit its ability to manufacture weapons to attack Ukraine.

China’s economic support to Russia has increased tremendously since Putin’s full-scale invasion of Ukraine in 2022, enabling Russia to sustain its wartime economy despite heavy sanctions from the United States, Europe, and other countries. With vast energy reserves and one of the world’s most developed oil and gas sectors, Russia is heavily reliant on revenue from energy exports, which also makes it particularly susceptible to targeted trade sanctions on the energy sector.* While Europe curbed Russian imports and the G7 engineered a sanctions regime to limit Russia’s ability to

*Russia’s oil and gas sector contributes about 20 percent of its GDP on average and 30 to 50 percent of total federal budget revenues.

sell oil above \$60 per barrel, China's purchases of Russian energy have allowed Moscow to replenish its resources and maintain fiscal solvency during the war (see Figure 2). Since the imposition of the oil price cap, China has been the largest purchaser of Russian fossil fuel by price (32 percent) and by volume (36 percent).¹⁶⁷ China imported 2.2 million barrels per day (bpd) from Russia in 2024 (about \$62 billion in annual value), up from 1.6 million bpd in 2021.¹⁶⁸ In 2023, Russia surpassed Saudi Arabia as China's largest crude oil supplier, now making up 21.5 percent of total Chinese crude imports compared to 15.5 percent prior to the war.¹⁶⁹

Figure 2: Export Destinations for Russian Fossil Fuel (21-Day Rolling Average), February 2022–August 2025



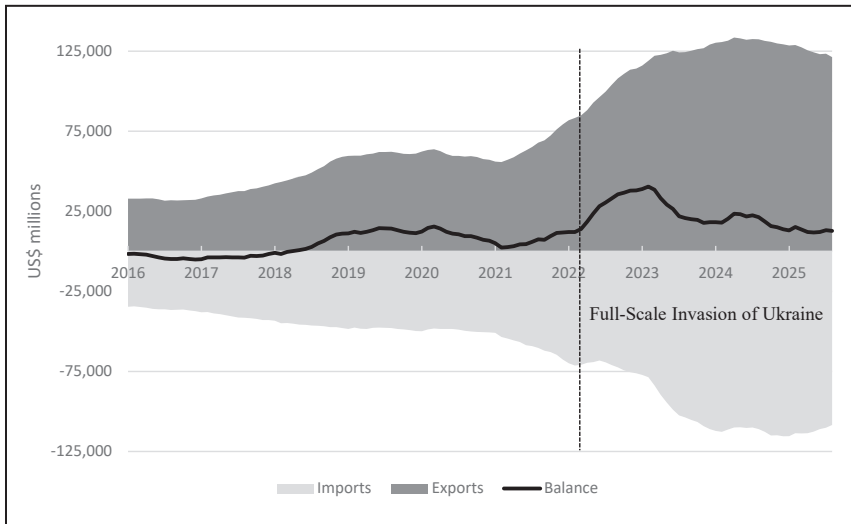
Source: Centre for Research on Energy and Clean Air, “Russia Fossil Tracker.”

Chinese state firms Sinopec, Zhenhua Oil, and PetroChina accounted for about half of China's purchases of oil from Russia until early 2025, when they began to curb purchases in response to the U.S. Department of the Treasury's expanded application of secondary sanctions on Russia's energy sector.¹⁷⁰ Small independent teapot refineries* purchase the remainder and have stepped up purchases to make up the difference.¹⁷¹ China has also helped prop up Russian farmers, as imports of Russian grain have increased over 400 percent since 2021 to \$428.6 billion, though this still only accounted for 2.9 percent of China's total cereal imports in 2024.¹⁷² Progress continues on a “New Land Grain Corridor,” a series of joint investments to build out transportation infrastructure that will enable Russia to further expand trade with China and other parts of Asia, and for China to diversify from seaborne routes for food imports.¹⁷³

*“Teapot” refineries are small independent refineries primarily clustered in Shandong Province that largely conduct transactions outside of the dollar-based financial system. Siyi Liu and Trixie Sher Li Yap, “China Teapot Oil Refiners Improve Run Rates but Demand Woes, Sanctions Weigh,” *Reuters*, April 6, 2025; Kimberly Donovan and Maia Nikoladze, “The Axis of Evasion: Behind China's Oil Trade with Iran and Russia,” *Atlantic Council*, March 28, 2024.

More generally, China has helped cushion the blow to Russia's economy from broad economic sanctions. Last year, Russia's GDP grew 4.3 percent, a level it would not have been able to achieve without the indispensable support of China.¹⁷⁴ Economic activity between China and Russia has expanded substantially since the start of the war, as China is backfilling both Russia's export sales and its need for imports and investment. Total China-Russia goods trade hit \$245 billion in 2024, up 66.7 percent from the pre-war level of \$147 billion in 2021 (see Figure 3).¹⁷⁵ Chinese companies have accrued greater market share in Russia in the wake of an exodus of foreign firms. Of the 50 largest foreign companies operating in Russia, 11 are now Chinese, compared to just one (Huawei) before the war.¹⁷⁶ This trend is especially pronounced in the auto industry, where the market share for Chinese automakers increased from 9 percent in 2021 to 61 percent in 2023.¹⁷⁷

Figure 3: Russia's Bilateral Goods Trade with China (12-Month Rolling Sum), January 2016–August 2025



Source: China's General Administration of Customs, via Haver Analytics.

Yet the trade relationship has become heavily lopsided, as Russia now depends on China for 34 percent of its external trade, while the comparable figure for China is 4 percent.¹⁷⁸ Recent signs point to Moscow's growing discomfort with the increasing level of dependence on Chinese imports. In October 2024, Russia increased a vehicle disposal tax on imported vehicles, a move tantamount to a tariff and regarded as incentivizing Chinese companies to set up manufacturing operations inside Russia.¹⁷⁹

China-Russia: Potential Points of Friction

As China and Russia's military and economic cooperation deepens, several structural and geopolitical friction points complicate their partnership. One core issue is the increasingly asymmetric power dynamic, with China's rising economic and military strength giving

it greater leverage over an internationally isolated and relatively weaker Russia, which has indisputably become the “junior partner” in the relationship.¹⁸⁰ This asymmetry risks fostering resentment in Russia that could act as an inhibitor on future collaboration, given the reversal of historical roles and Putin’s sensitivity to personal and national prestige.¹⁸¹ A planning document believed to have been written in late 2023 or early 2024 by Russia’s domestic intelligence agency, the FSB, referred to Beijing as “the enemy” and accused it of conducting espionage against Russia, including recruiting Russian spies and stealing sensitive military technology.¹⁸² The FSB also warned that China was using academic and commercial fronts to gather intelligence in sensitive regions like Ukraine and the Arctic while potentially laying the groundwork for territorial claims in the latter.¹⁸³ Chinese military planners have been trying to acquire Russian expertise in certain technologies, including “submarine operations, aeronautical design (including stealth capabilities), and missile systems.”¹⁸⁴ According to Alexander Gabuev, director of the Carnegie Russia Eurasia Center, Russia’s growing dependence on dual-use materials and technology from China to sustain its war effort has made it increasingly difficult for Moscow to resist these requests.¹⁸⁵ This dynamic risks creating tensions, as pressure on Russia to relinquish sensitive military technologies could strain the relationship.

From China’s perspective, its deepening relationship with Russia presents several points of friction. First, China has incurred diplomatic costs for supporting Russia during the Ukraine war, particularly in European capitals where Beijing’s perceived alignment with Moscow has strained key relationships.¹⁸⁶ This concern contributed to China’s decision not to provide direct lethal exports to Russia, but it may also limit Beijing’s willingness to deepen overt military ties with Moscow.¹⁸⁷

Second, Beijing clearly had concerns about Moscow’s potential willingness to use nuclear weapons early in the Ukraine war.¹⁸⁸ China warned Russia against using nuclear weapons on Ukraine, with Xi issuing a personal warning to Putin during his visit to Moscow in March 2023 that underscored Beijing’s discomfort with the potential for nuclear escalation by a close strategic partner.¹⁸⁹ While both China and Russia emphasize nuclear deterrence in their national security strategies, China has historically adopted a “no first use” doctrine, while Russia has shown a greater willingness to invoke its nuclear arsenal for coercive purposes, particularly in the context of conventional conflict.¹⁹⁰ Although Russia has long had a much greater nuclear weapons capability than China, Beijing is rapidly expanding its arsenal. While the Kremlin has publicly said it is not alarmed by China’s actions, leaked military training documents reveal deep Russian concerns—particularly about the possibility of China staking claims to its eastern border territories—and show that Russia has rehearsed the use of tactical nuclear weapons in the event of a Chinese invasion.¹⁹¹

Third, as noted above, Beijing and Moscow continue to have unresolved border disputes that, despite formal demarcation agreements in 1991 and 2004, continue to stir nationalist sentiment.¹⁹² Chinese officials and netizens periodically refer to the 19th-centu-

ry treaties that ceded territory to Russia as “unequal.”¹⁹³ Finally, China and Russia both seek influence in regions like Africa, Central Asia, and the Arctic.¹⁹⁴ Beijing’s economic interests prioritize regional stability to safeguard infrastructure and investments under BRI, whereas Moscow often benefits from—and exploits—instability, particularly in regions with weak governance. The war in Ukraine has weakened Russia’s position in these other regions and forced it to acquiesce to China’s growing dominance. In the Arctic, for instance, Russia had long rebuffed China’s desire to become more active, fearing Beijing’s presence would undermine its dominance in the region. Since its isolation from the West, however, Moscow has embraced greater collaboration, seeking to use China’s resources to unlock the Arctic’s economic and energy potential.¹⁹⁵ Chinese shipping companies are currently in talks with Russian companies to develop five container ships capable of year-round operations in the Arctic.¹⁹⁶

These potential friction points highlight the growing power imbalance as well as differing approaches to the international order, whereby China has sought to promote stability and protect its global economic interests and image as a responsible power while Russia has used instability as an opportunity to expand its influence. Ultimately, because China and Russia’s growing relationship is driven less by mutual trust than by a shared opposition to the U.S.-led international order, both accrue many more advantages than disadvantages from their ties.

China’s Partnership with Iran

China’s support has helped enable Iran to circumvent international sanctions and continue to spread instability throughout the Middle East, thereby challenging the U.S.-led order. By deepening its involvement in the Middle East, China advances its strategic goals in a region vital to global energy supplies while complicating U.S. efforts to maintain a dominant position in the region.¹⁹⁷ Beijing and Tehran signed a comprehensive strategic partnership agreement in 2021, wherein China pledged to invest \$400 billion in economic and infrastructure projects over a 25-year period as well as enhance cooperation on military, security, intelligence, and cyber issues.¹⁹⁸ Beijing likely views prolonged U.S. entanglement in the region as strategically advantageous because it diverts U.S. attention and resources away from the Indo-Pacific. As Iran has come to rely on revenue from China’s purchases of nearly all of its heavily discounted oil, the relationship has become deeply asymmetric. Consequently, China has chosen to keep Iran at arm’s length in order to not jeopardize its other—predominantly economic—interests in the region.¹⁹⁹ The asymmetry and restraint in this relationship was evident in China’s subdued response to the June 2025 U.S. strikes on Iranian nuclear facilities, when Beijing’s support for Tehran proved largely rhetorical in Iran’s hour of need.²⁰⁰ (For more on China’s response to the U.S. strikes on Iranian nuclear facilities, see “China-Iran: Potential Points of Friction” later in this chapter.) Most analysts assess that while China has a strong interest in the survival of the Iranian regime, it is unlikely to offer direct military support, at least in the near term.²⁰¹

China-Iran Security Cooperation: Generally Discreet and Dual-Use

China was a major supplier of arms to Iran in the 1980s but largely stopped arms transfers in 2015 after the U.N. Security Council passed Resolution 2231 as international sanctions increased scrutiny of overt weapons transfers to Iran.²⁰² Since then, Russia has emerged as Iran's primary arms supplier, accounting for all imports of major arms between 2019 and 2023.²⁰³

Despite stepping away from conventional arms sales, China has since shifted toward more discreet forms of cooperation, including the transfer of military technology to Iran and the supply of dual-use materials critical to Iran's ballistic missile program and used in the production of Iranian drones. This includes Beijing's transfer of missile, naval, and aviation technologies, which helped establish Tehran's domestic defense manufacturing capabilities.²⁰⁴ In January 2025, two Iranian vessels docked in China were loaded with approximately 1,000 tons of sodium perchlorate, a precursor used in missile propellant. This volume is estimated to be enough to fuel 260 missiles.²⁰⁵ A few months later, part of the shipment, along with other missile fuel chemicals, was linked to an explosion at Shahid Rajaei port in Iran that killed 25 people and injured around 800 others.²⁰⁶ In June 2025, the *Wall Street Journal* reported that Iran had ordered thousands of tons of ammonium perchlorate, another critical component for ballistic missiles, from China. While a Chinese Foreign Ministry spokesperson claimed Beijing was unaware of the transaction, the scale and recurrence of such transfers indicate that enforcement gaps or limited oversight by Chinese authorities may be enabling these activities.²⁰⁷ These shipments underscore how, even without direct weapons sales, China remains a key enabler of Iran's missile development, undermining international non-proliferation efforts and reinforcing Iran's regional influence.

Other dual-use components from China include voltage converters, sensor technologies, and engines, all of which have legitimate commercial applications but are also integral to Iran's drone production.²⁰⁸ Iranian drones, built with Chinese parts, have been used not only by Tehran's regional proxy forces but also by Russia in Ukraine.²⁰⁹ Beyond hardware, China has also enhanced Iran's drone capabilities through providing access to BeiDou, China's global positioning navigation satellite system. Starting in 2015, Iranian defense companies partnered with Chinese firms to integrate satellite navigation technology into their unmanned aerial vehicles (UAVs), which significantly improved their targeting accuracy. By 2021, China granted Iran full military access to BeiDou, providing greater precision and effectiveness of Iran's unmanned systems.²¹⁰ In May 2025, Chang Guang Satellite Technology, a private Chinese space company with close links to the PLA, was reportedly providing satellite imagery to Iranian-backed Houthis to assist in their targeting of vessels in the Red Sea.²¹¹

Additionally, Chinese nationals have also been found smuggling sensitive U.S.-origin dual-use items to Iranian military entities despite international sanctions. The Treasury Department's Office of Foreign Assets Control (OFAC) and the U.S. Department of Commerce's Bureau of Industry and Security (BIS) have taken action

against multiple entities based in China and Hong Kong that essentially operate as front companies for procuring UAV and other dual-use components for Iran.*²¹² Uninhibited operation of these networks highlight persistent enforcement challenges within China's regulatory framework, raising concerns about Beijing's ability or willingness to fully control illicit proliferation activities. These activities not only strengthen Iran's nuclear and missile programs but also risk empowering proxies in the region, including the Houthis in Yemen, which could destabilize an already volatile security environment.

As Iran's top trading partner, China has significant economic leverage over Iran. China has a history of using economic leverage as a foreign policy tool against other countries but has notably refrained from pressuring Iran to cease its destabilizing activities or those of its proxies.²¹³ For instance, despite China's stated interest in regional stability and securing critical maritime routes, Beijing has evidently not pressured Tehran into curbing Houthi attacks on civilian shipping in the Red Sea corridor, other than for Chinese and Russian ships.²¹⁴

China-Iran Economic Ties: China Exploits an Isolated Iran, Fueling Regional Conflict

Despite Iran being one of the most heavily sanctioned countries in the world, China maintains a robust trade and investment relationship with the country and provides crucial revenue and material support.† With the world's second-largest natural gas reserves and fourth-largest proven oil reserves, Iran is heavily reliant on the sale of hydrocarbons, making it highly susceptible to sanctions on the state-owned energy sector.²¹⁵ In 2024, Iran's real GDP was \$436.9 billion, and oil export revenue during the Iranian calendar year‡ ending in March 2025 hit \$67 billion, amounting to 15 percent of annual GDP.²¹⁶ Tehran estimated that about 45 percent of the government budget for 2025–2026 would come from oil and gas sales and would account for the single biggest source of government revenue.²¹⁷ The largest share of oil revenues in Iran's budget was earmarked for Iran's military.²¹⁸

China has systematically undermined the sanctions regime and now purchases from 90 percent to nearly all of Iran's exported oil (see Figure 4).²¹⁹ Purchases from Iran account for 10 to 15 percent of China's oil imports, compared to roughly 45–50 percent from other Middle Eastern countries.²²⁰ To obscure the scale of trade and help evade U.S. and European sanctions, these purchases are not recorded by Chinese customs data. Instead, they are reported un-

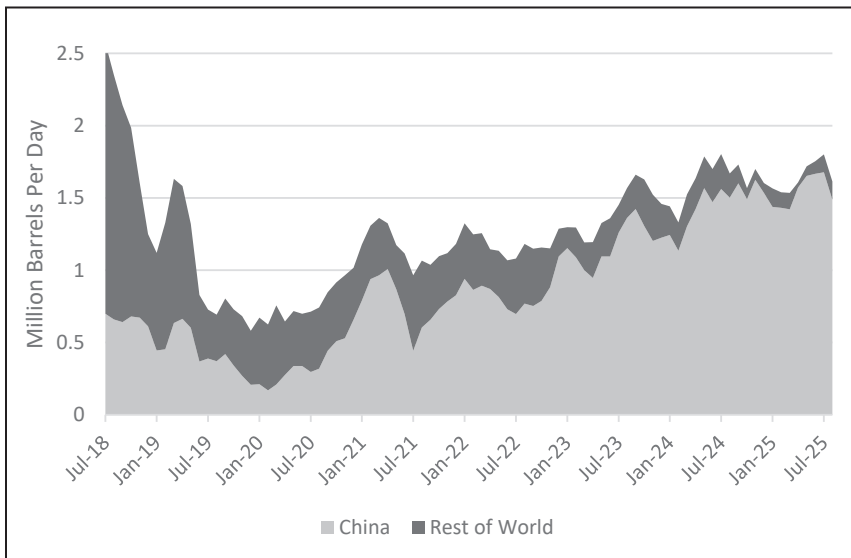
*There are several examples of these cases that can be found in the listed article. Victoria Cheng, "Case Study on Smuggling Sensitive U.S.-Origin Items," *Institute for Science and International Security*, August 12, 2024.

†The U.S. sanctions program against Iran in current form blocks all access to U.S.-based assets, prohibits transactions with U.S. persons, bans nearly all U.S. trade with Iran, prohibits arms trade to or from Iran, and contains a secondary sanctions element putting at risk foreign financial institutions that do business with sanctioned Iranian persons. UN sanctions imposed prior to the 2015 JCPOA were lifted in January 2016 after the International Atomic Energy Agency certified Iran's compliance with the agreement. They were reimposed in September 2025 after France, Germany, and the UK invoked a snapback mechanism due to Iran's "significant non-performance" of its commitments under the agreement. U.S. Department of State, *Completion of UN Sanctions Snapback on Iran*, September 27, 2025.

‡Iran uses a different calendar year than the United States; Iran's calendar year begins in March.

der import figures of other countries, mainly Malaysia, Oman, and the UAE.²²¹ Through the first quarter of 2025, China's purchases of Iranian oil had been steadily climbing for years, making Iran China's third-largest source of crude oil behind Russia and Saudi Arabia.²²² In October 2024, the *Economist* estimated that Iranian petroleum and petrochemical sales generated as much as \$70 billion in 2023.²²³ Factoring in costs of production, China's oil purchases from Iran provide a significant overall portion of Tehran's entire government budget and military spending. (For more on China's facilitation of sanctions and export control evasion, see Graham Ayres and Lyndi Tsering, "China's Facilitation of Sanctions and Export Control Evasion," *U.S.-China Economic and Security Review Commission*, November 2025.)

Figure 4: Iranian Crude Oil Export Destination (Three-Month Moving Average), July 2018–August 2025



Source: United Against Nuclear Iran, "Iran Tanker Tracker."

As previously mentioned, China and Iran signed a comprehensive strategic partnership agreement in 2021, a much lauded agreement that Iranian officials hailed as a "complete road map of relations for the next quarter century."²²⁴ Under the agreement, China pledged to invest \$400 billion in various sectors, including oil and gas, banking, telecommunications, ports, railways, healthcare, information technology, and tourism.²²⁵ The agreement also outlined joint plans to construct two ports in Iran: one in Chabahar and a new oil terminal near the Jask port, south of the Strait of Hormuz.²²⁶ These ports, along with the Gwadar Port in Pakistan and the Kyaukpyu Port in Burma (Myanmar), form part of China's strategic network of Indian Ocean ports.²²⁷ This is particularly significant given that roughly 80 percent of China's oil imports and 95 percent of its trade with the Middle East pass through the Indian Ocean and the Strait of Malacca.²²⁸ By the start of 2024, China had reportedly only in-

vested \$185 million in new projects, well below the expected \$32 billion if outlays were dispersed evenly over 25 years.²²⁹

President Ebrahim Raisi visited China in 2023 to convey Iran's concerns about the lack of progress on implementing the agreement, the first visit by an Iranian president in 20 years.²³⁰ The Iranian Foreign Ministry's readout emphasized Tehran's eagerness to accelerate and deepen the partnership. Beijing, however, responded more cautiously, releasing a vague statement on economic cooperation without citing concrete projects.²³¹ The underwhelming investment figures likely reflect reluctance on the part of Chinese companies to engage in open transactions with Iran due to fears of violating U.S. sanctions.²³²

China-Iran: Potential Points of Friction

The chief point of friction in the bilateral relationship has stemmed from Iran's nuclear program. In the mid-1990s, China began signaling its opposition to Iran developing nuclear weapons, although it continued to provide open support to Iran's nuclear power industry.*²³³ Beijing's response to the June 2025 strikes on three of Iran's nuclear facilities was limited to condemning the attacks and calling for a ceasefire at the UN Security Council alongside Russia and Pakistan, with no indication that China planned to provide material support to Iran.²³⁴ While China has affirmed Iran's right to produce nuclear energy, Foreign Minister Wang Yi confirmed China's stance toward Iran's nuclear program in the days after the strikes, including the point that "Iran should continue to honor its commitment not to develop nuclear weapons."²³⁵ China has advocated that Iran return to the JCPOA—or a similar framework—that limits Iran's nuclear activities and allows for removal of sanctions from the country.²³⁶ China likely sees Iran's continued pursuit of nuclear weapons as having the potential to create regional instability or spark a crisis in the Middle East that would negatively affect China's energy and economic interests.²³⁷ Chinese business interests in the region would also likely be negatively impacted if additional sanctions were imposed on Iran by the United States and like-minded countries, whether as part of a maximum pressure campaign or punishment for developing a weapon.²³⁸

Leaders in Iran were disappointed in China's restrained response to the June 2025 attacks, viewing it as indicative of a relationship shaped more by China's energy and commercial interests than the deeper strategic partnership they had sought from China.²³⁹ Tino Sanandaji, a Swedish-Iranian researcher with the Stockholm School of Economics, stated that "a common complaint in Iran is that China and Russia, rather than being true friends, exploit Iran's isolation to get cheap natural resources while selling Iran second-rate military hardware at inflated prices, sometimes never even delivering the promised equipment."²⁴⁰

*China's accession to the Nuclear Non-Proliferation Treaty (NPT) in 1992 marked a shift toward the international nonproliferation regime, yet concerns about its role in Iran's nuclear proliferation grew rapidly. After the Iran-Iraq War, Iran emphasized the need to develop non-conventional capabilities, prompting Western media to allege that China was aiding a nuclear weapons program through the export of nuclear technologies. Beijing denied these allegations, asserting that its nuclear assistance to Iran was lawful and intended solely for peaceful purposes. Marybeth Davis et al., "China-Iran: A Limited Partnership," *CENTRA Technology, Inc.* (prepared for the U.S.-China Economic and Security Review Commission), April 2013.

For its part, China has had to balance its activities with Iran against its broader interests in the Middle East. China imports large amounts of crude oil from Saudi Arabia and Iraq and conducts far more trade with Saudi Arabia (\$107.5 billion in 2024) and the UAE (\$101.8 billion in 2024) than with Iran (\$42.4 billion in 2024).^{*241} The wealthier Arab Gulf states offer more attractive long-term trade and investment opportunities for China. Chinese firms have large contracts with Qatar, Saudi Arabia, and the UAE for a range of platforms and technologies to support their ambitious buildout of digital infrastructure.²⁴² Thus, China has little incentive to prioritize relations with Iran over its Gulf state partners. Reflecting these interests, China sided with the UAE in a dispute over three Persian Gulf islands, prompting rare protests from Tehran in June 2025. Iran's foreign minister summoned China's ambassador, urging a policy reversal, but Beijing merely called for a peaceful resolution and upheld its original stance.²⁴³

Despite these frictions, there is not much evidence that their relationship is fraying.²⁴⁴ China continues to keep Iran at arm's length while benefiting from both its discounted oil and its efforts to undermine the Western-led order. While Iran would like more from China, it greatly benefits from diplomatic support, dual-use technologies, and access to an all-important export market.

China's Partnership with North Korea

Historically, China has placed considerable strategic value on its relationship with North Korea, dating back to its assistance to Pyongyang during the Korean War in the 1950s.²⁴⁵ China's only formal alliance is with North Korea: the 1961 Treaty of Friendship, Cooperation, and Mutual Assistance. More recently, China has become virtually the sole trade partner for a North Korean regime isolated by heavy sanctions.²⁴⁶ In 2021, the two countries renewed the treaty, signaling a continued commitment to strategic alignment.²⁴⁷ The two countries have often used a metaphor of "lips and teeth" to describe the closeness of their relationship.²⁴⁸

In September 2025, Kim Jong Un met with Xi Jinping during a high-profile Chinese military parade, marking the first time in 66 years that a North Korean leader had attended the event.²⁴⁹ Kim received a warm welcome from Xi, walking side by side with him and President Putin down the red carpet.²⁵⁰ Xi also hosted Kim for private dinners and a formal bilateral meeting following the parade.²⁵¹ Experts have interpreted this highly symbolic display as Beijing's attempt to reset bilateral relations and reassert its influence over Pyongyang.²⁵² However, readouts from the event did not address underlying tensions between the two countries. Instead, China emphasized strengthening cooperation based on "common interests," signaling to Pyongyang the importance of pursuing a more pragmatic, interest-driven partnership and aligning more closely with China's strategic priorities, particularly amid North Korea's deepening ties with Russia and the prospect of future nuclear talks with the United States.²⁵³

^{*}The figure for Iran includes an estimated \$29 billion of unreported oil exports. Ron Bousso, "China Trade Spat Undermines Trump's 'Max Pressure' Iran Campaign," *Reuters*, April 10, 2025.

The Kim regime's pursuit of nuclear weapons and its erratic actions, coupled with Beijing's desire to be seen as a responsible international power, have led Beijing to temper its support. After North Korea's 2017 Musudan intermediate-range ballistic missile test off its eastern coast, China reinforced the UN sanctions regime on North Korea's missile and nuclear programs.²⁵⁴ In addition to sanctions, China implemented unilateral measures that suspended coal imports from North Korea, which made up approximately 34 to 40 percent of Pyongyang's export revenue and had a substantial negative impact on the regime's ability to finance its programs.²⁵⁵ Although relations improved in 2018, tensions persist, particularly over North Korea's repeated missile tests. China has viewed the tests not only as destabilizing but also as inviting a greater U.S. military presence in Northeast Asia and strengthening U.S. relations with Japan and South Korea, reinforcing the strategic encirclement Beijing has sought to avoid.²⁵⁶ Since the Russian invasion of Ukraine, Beijing has shown signs of unease over Pyongyang's increasingly close ties with Moscow, as a deeper military alignment could undermine China's longstanding influence over North Korea.²⁵⁷

China-North Korea Security Cooperation

For China, North Korea holds a critical geopolitical location that serves as a strategic buffer in Northeast Asia, preventing encroachment by the United States or its allies on one of its borders. In the decades following the Korean War, particularly in the 1990s, China offered professional military training and facilitated technological exchanges that contributed significantly to the development of North Korea's ballistic missile and satellite capabilities.²⁵⁸ However, since North Korea's first nuclear test in 2006, Beijing began to publicly distance itself from Pyongyang's weapons development efforts and reduced its military support, with cooperation largely limited to areas such as cyber operations and diplomatic support.

Despite growing frustration with North Korea, China has continued to shield Pyongyang diplomatically, often downplaying or dismissing international evidence of its provocations against South Korea, Japan, and the United States. Beijing has repeatedly resisted or undermined U.S. efforts to apply sustained diplomatic and economic pressure on North Korea, placing more importance on North Korea's role as a buffer than curtailing its weapons development activities. In October 2024, North Korea conducted an intercontinental ballistic missile test, setting the national record by reaching an altitude of over 4,000 miles.²⁵⁹ While the United States and other UN Security Council members condemned the launch, China refrained from doing so and aligned with Russia in opposing the U.S.-led statement at the UN. Although China has expressed concern over North Korea's missile and nuclear tests, at the same time it has consistently stressed the importance of "regional stability" and has advocated for dialogue and negotiation rather than escalating sanctions or military responses.²⁶⁰ China has urged not only North Korea but also the United States, South Korea, and their allies to exercise restraint to avoid heightened tensions.²⁶¹ For decades, Beijing has leveraged its role as North Korea's primary economic and diplomatic partner to position itself as an indispensable interlocutor in managing

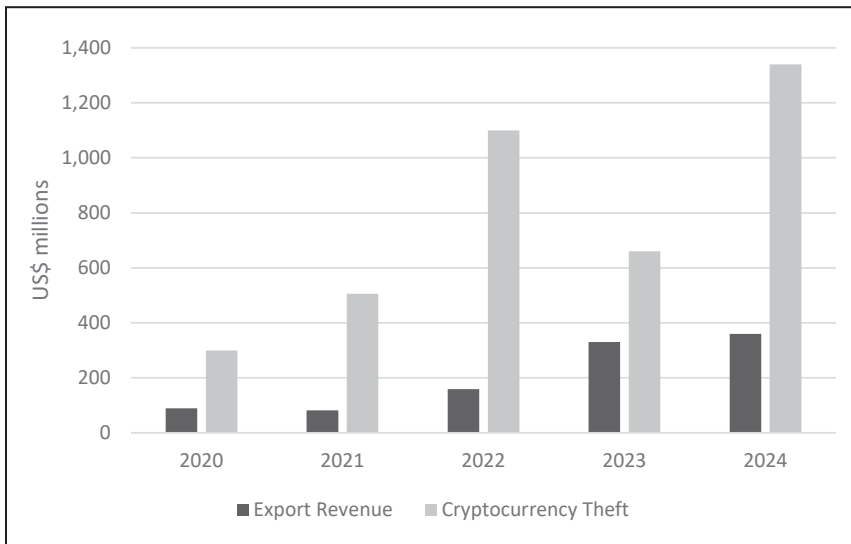
the Korean Peninsula, especially during the Six-Party Talks in the 2000s, and shape U.S. policy in ways that serve its strategic interests.²⁶² This balancing act underscores China's desire to avoid instability near its borders while maintaining leverage over North Korea.

Since the 2006 nuclear test, the Chinese government has refrained from directly supplying North Korea with nuclear weapons technology or technical expertise and has restricted conventional arms sales. China has continued to support North Korea, however, through dual-use technology transfers that have expanded North Korea's military and, in some cases, strategic capabilities. In 2010, China Aerospace Science and Industry Corporation sold heavy-duty trucks to North Korea.²⁶³ These were later repurposed by North Korea as transporter-erector-launchers for its KN-08 intercontinental ballistic missiles, marking a major advancement in North Korea's road-mobile nuclear capabilities.²⁶⁴ Clandestinely or covertly, it is likely that China has also supplied dual-use products critical for many of North Korea's weapons systems. According to testimony from Jake Rinaldi, a defense analyst at the U.S. Army War College, China provided technology to Pyongyang's indigenous drone program and training to North Korean engineers working in satellite operations.²⁶⁵ Over the last several years, U.S. authorities, including the Treasury Department and the Commerce Department's BIS, have taken enforcement actions against numerous entities in Hong Kong, Macau, and mainland China linked to networks that have helped North Korea covertly acquire materials and technology for its ballistic missile and space programs.²⁶⁶ A key Chinese facilitator, the so-called Shi Qianpei network, was sanctioned by the Treasury Department for its role in concealing the true shipments and destinations of military-grade components.²⁶⁷

China also appears to play an important role in supporting North Korea's globally disruptive cyber crime and military-related cyber activities. North Korean military cyber units have operated from Chinese territory and engaged not just in espionage and intelligence gathering but also in cyber crime to generate revenue for the regime and its military and strategic ambitions.²⁶⁸ For example, in 2022, North Korean hackers carried out a widespread ransomware attack from China that targeted U.S. hospitals, causing widespread disruption to healthcare providers and patients.²⁶⁹ China has also hosted numerous North Korean IT workers who have hidden their identities and provided remote IT work for clients around the world, sometimes using this work to advance North Korea's malicious hacking operations as well. According to OFAC, the "revenue generated by these DPRK [Democratic People's Republic of Korea] IT workers [is] used by the DPRK to develop its WMD [weapons of mass destruction] and ballistic programs, in violation of U.S. and UN sanctions."²⁷⁰ Operating in China has allowed North Korea to exploit that country's advanced computing and internet infrastructure while maintaining plausible deniability for its destructive cyber activities.²⁷¹ In January 2025, the Treasury Department sanctioned a network involving a Chinese company, Liaoning China Trade Industry Co., Ltd., for supplying electronics equipment to North Korean IT workers operating within or through Chinese territory.²⁷²

Beyond the direct harm from North Korea's cyber activities, China's role in facilitating these activities has had other implications. First, North Korean cyber crime has been critical for generating hard currency for the regime. Ill-gotten gains from cryptocurrency theft consistently outstrips trade revenue, with North Korean hackers pulling in \$1.34 billion from the practice in 2024 alone (see Figure 5).²⁷³ Not only has this revenue enhanced North Korea's capacity to threaten its neighbors, it has also decreased the Kim regime's reliance on external partners like China. Second, the presence of North Korean cyber operatives in China has enhanced North Korea's resilience. At the Commission's 2025 hearing, Dr. Rinaldi testified that the continued presence of North Korean cyber operatives in China would likely ensure the survivability and operational continuity of the regime's cyber forces, even if North Korea's domestic systems were severely disrupted.²⁷⁴

Figure 5: Estimated North Korean Export Revenue vs. Stolen Cryptocurrency Proceeds, 2020–2024



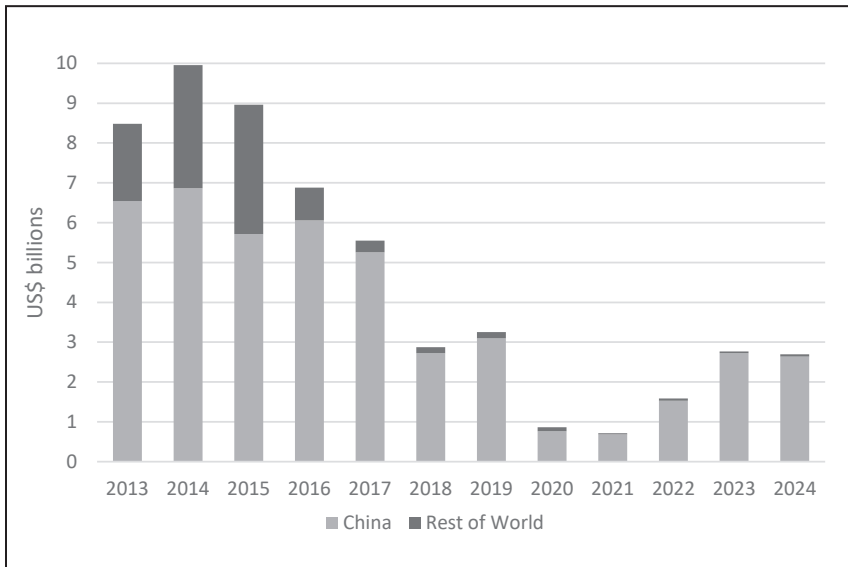
Source: Various.²⁷⁵

China-North Korea Economics and Trade: Near-Complete Reliance Has Not Translated Neatly to Influence

China has maintained an official position of adherence to, and enforcement of, all UN sanctions against the Kim regime.²⁷⁶ In practice, Beijing has facilitated sanctions and export control evasion on behalf of North Korea for nearly two decades.²⁷⁷ North Korea remains almost exclusively reliant on China for its external economic activity. China is North Korea's largest trading partner, accounting for 98.3 percent of the DPRK's reported trade in 2023 (see Figure

6).^{*278} While total two-way trade is relatively small and still recovering from North Korea's extreme COVID-19 lockdown, trade with China amounted to \$2.7 billion in 2023 and constituted one of North Korea's few non-illicit lifelines to non-domestically made products and one of its few official sources of revenue.²⁷⁹ Officially, North Korea imports luxury items, chemical products, and agricultural goods from China while exporting raw materials and energy products. North Korea exports about 3 percent of its electricity to China despite persistent domestic power outages.²⁸⁰ Curiously, in 2023 North Korea exported \$167 million worth of human hair, fake eyelashes, and wigs to China, most of which was relabeled "Made in China" and then sold in global markets.²⁸¹ Remittances from North Korean workers in China are another lucrative revenue stream. North Korean workers are present in a variety of industries in China, including in factories in the northeastern border region, on fishing boats, and as previously described as IT support specialists.²⁸² (For more on China's facilitation of sanctions and export control evasion, see Graham Ayres and Lyndi Tsering, "China's Facilitation of Sanctions and Export Control Evasion," *U.S.-China Economic and Security Review Commission*, November 2025.)

Figure 6: Estimated North Korean Goods Trade with China and Rest of World, 2013–2024



Source: Various.²⁸³

North Korea's trade has undergone two shocks in recent years: (1) the imposition of more severe international sanctions limiting the country's commercial trade in 2017 in response to its nuclear missile

*North Korean weapons sales are not included in these trade figures, which—according to one estimate—range anywhere between \$1.7 billion and \$5.5 billion. Olena Guseinova, "Putin's Partner: North Korea's Cooperation with Russia amid the War against Ukraine," *Hanyang University*, October 2024.

testing, and (2) a self-imposed strict border closure due to COVID-19 in 2020 that largely halted all trade until January 2022.²⁸⁴ Despite the tightening of broad-based sanctions, North Korea's continued provocations and self-inflicted isolation demonstrate both the Kim regime's commitment to nuclearization and high tolerance for economic pain.

Given China's apparent leverage over North Korea, Kim's actions indicate either the limits of China's ability to check behavior it regards as destabilizing or the limited extent to which China genuinely has concerns about those actions.²⁸⁵ As Dr. Rinaldi testified to the Commission, "While China denies direct involvement in North Korea's black-market activity, its failure to disrupt these operations over decades should be seen as a strategic choice."²⁸⁶

China-North Korea: Potential Points of Friction

Despite their longstanding alliance, several points of friction complicate China-North Korea relations. A major concern for Beijing is North Korea's ongoing nuclear weapons development program, which destabilizes East Asia, risks drawing China into a broader regional conflict, and flies in the face of widespread international consensus against nuclear proliferation. Although North Korea increasingly disregards China's counsel and pursues an independent strategic agenda, Beijing has continued to shield Pyongyang from the full impact of international sanctions.²⁸⁷ This paradox highlights a key element of friction as Beijing seeks to preserve ties with Pyongyang to retain leverage over its foreign policy, even as its unease has grown over Pyongyang's defiance and pursuit of its own strategic agenda.²⁸⁸ North Korea's erratic behavior also complicates China's efforts to present itself as a responsible global actor, making it harder for Beijing to convince the international community that it supports peace and stability.

More recently, China appears increasingly concerned about Pyongyang's growing military cooperation with Russia amid the war in Ukraine. The June 2024 treaty between North Korea and Russia, which reportedly includes mutual defense commitments, signals a potential return to Cold War-style bloc politics, something China has sought to avoid. China has remained officially neutral in response to deepening Russia-North Korea relations, with a Chinese Foreign Ministry spokesperson stating that both countries are "independent sovereign states" and that how they develop their bilateral ties is "their own matter."²⁸⁹ However, subtle signs of Beijing's unease have emerged, suggesting China views this deepening partnership with concern.²⁹⁰ If Russia assumes a significant security guarantor role for North Korea, it would substantially reduce China's leverage over Pyongyang. Moreover, given the complex and sometimes competitive history between China and Russia, Moscow's growing presence in North Korea could strain their relationship by challenging China's traditional influence in a region it considers strategically vital.

These friction points, however, remain secondary to China's overriding strategic interest in maintaining North Korea as a geopolitical buffer on the Korean Peninsula and its broader interests in undermining U.S. global influence and the rules-based international order.

Implications for the United States

No matter the terminology used, the strengthening of relationships among China, Russia, Iran, and North Korea poses a significant national security threat to the United States and its allies and partners around the world. These states share common objectives in weakening U.S. power and influence and in undermining elements of the existing rules-based international system. Although the relationship among the countries does not constitute an alliance as traditionally conceived, in many ways these revisionist countries collaborate more robustly than the Axis powers did prior to World War II. As the alignment is based more on shared interests and expediency than trust and loyalty, each has freedom of action and the ability to decline to participate in a conflict that others may trigger. This arrangement creates advantages that far exceed the disadvantages, which will make it extremely difficult for the United States—or any group of states—to disrupt or quickly drive a wedge between these countries.

The relationships the axis countries have with each other—with China often at the center—present serious strategic challenges for the United States, as they allow each country to consider the use of force, undertake provocative actions, and otherwise act in ways they could not sustain on their own. As evident in the ongoing conflict in Ukraine, China, Iran, and North Korea have provided Russia with political, economic, and military support, decisively enabling its aggression and allowing it to circumvent U.S. and international sanctions and diplomatic pressure. In this context, each individual challenge becomes harder to resolve as the interlinkages between and among these revisionist countries serve as force multipliers, and each challenge has the potential to “set the world on fire.”

The presence of nuclear weapons in China, Russia, and North Korea—and Iran’s pursuit of them—adds a dangerous and destabilizing dimension to their deepening strategic cooperation, making deterrence more complex and raising the stakes of miscalculation or escalation. As China increasingly transforms the military balance in the Western Pacific in its favor, it may become more emboldened—banking on support from its “axis” partners—to use force against a U.S. treaty ally in the region.

Each of these revisionist countries has sought to establish a sphere of influence in its region, and the United States and its security commitments with partners have often served to thwart those efforts. As these states deepen cooperation, they seek to shift those regional power balances in their favor by undermining the credibility of U.S. commitments to regional partners and to weaken U.S. power and influence in general.

Lacking an overarching strategy or joint military capabilities, these countries are increasingly likely to conduct gray zone activities as they seek to test limits and gauge U.S. and regional reactions. (See Chapter 2, “U.S.-China Security and Foreign Affairs (Year in Review)” for more on this topic.) **If there is no coordinated effort to impose a significant cost on these countries for such gray zone conduct, they are likely to become increasingly brazen in the future.**

The growing ties between the axis countries also increase the likelihood of escalating actions, potentially culminating in “opportunistic aggression” by other members of the group. Each country may be emboldened to take more provocative actions knowing the other countries will provide support to the primary aggressor—from a limited border skirmish or cyberattack to a much more significant crisis, such as a Chinese blockade of Taiwan. Even more significantly, the countries may act “opportunistically” to try to take advantage of diversions of U.S. attention and resources—for example, Russia exploiting a Taiwan contingency by moving military forces into an eastern European country. Such dynamics raise the danger that even small provocations could spiral into broader confrontations with global consequences.

As the most powerful and systemically integrated of these countries, China has been a “decisive enabler” of this group. By cooperating with—and legitimizing—these heavily sanctioned countries, China has helped erode the broader international norms that have at times constrained destabilizing behavior and aggression, and it has undermined the effectiveness of sanctions and export controls by facilitating trade and capital flows outside of the global trading system. As China and its sanctioned partners build this shadow trading system, it chips away at the dollar-based financial system’s centrality in global trade and the relative power of the United States in that system.

China’s activities have been part of the broader-based effort by this group of authoritarian powers to advance an alternative vision of global order rooted in power, coercion, and hierarchy. They seek to replace the international system that evolved after World War II based on rules, norms, and principles such as sovereign equality, the peaceful resolution of disputes, and the universal protection of human rights. **To respond to this challenge, the United States—and its allies and partners around the world—must develop a clear-eyed understanding of this evolving strategic threat and pursue strategies that enhance preparedness for multiple potential regional flashpoints that each could quickly escalate into a crisis.** Unfortunately, this challenge has come at a time when growing divisions within many democratic societies have undermined their willingness and ability to act in a concerted fashion to resist these efforts.

Recommendations

The Commission recommends:

- Congress consider legislation establishing a consolidated economic statecraft entity to address the evolving national security challenges posed by China’s systematic and persistent evasion of U.S. export controls and sanctions.

This new unified economic statecraft entity, at a minimum, should include: the Bureau of Industry and Security (U.S. Department of Commerce), the Office of Foreign Assets Control (U.S. Department of the Treasury), the Bureau of International Security and Nonproliferation’s Office of Export Control Cooperation (U.S. Department of State), the Defense Technology Se-

curity Administration (U.S. Department of Defense), and other appropriate organizations across the executive branch.

This entity should be:

- Integrated into the Intelligence Community with enhanced access to real-time intelligence on evasion networks and real-time intelligence-sharing capabilities with industry to identify emerging evasion tactics;
- Equipped with enforcement authorities comparable to those wielded by the Treasury Department in the financial sanctions sphere, including law enforcement authorities to pursue aggressive enforcement against violators;
- Structured as a direct report to a single cabinet official or the President of the United States so as to ensure strategic coordination across government, unencumbered by the inter-agency processes; and
- Equipped with resources for technology development, analysis, and international coordination and authority to implement robust verification systems and supply chain tracking technologies.

This recommendation addresses the critical gap between export controls and sanctions as written and their actual enforcement, recognizing that China and Russia continue to successfully circumvent existing safeguards while U.S. technological advantages erode. Modernizing export controls and sanctions infrastructure represents an essential evolution of U.S. economic statecraft for the strategic competition era.

The United States urgently requires modernization of its export controls and sanctions regime to counter China's systematic and persistent circumvention tactics. The current fragmented approach across multiple agencies dilutes accountability and prioritization. Consolidating these authorities under a single entity would create clear ownership, institutional incentives to prioritize enforcement, and concentrated resources dedicated to countering circumvention. Today's dispersed structure does not enable such focused effort. The Commission notes that Congress passed the Foreign Investment Risk Review Modernization Act of 2018 (FIRRMA), which strengthened the Committee on Foreign Investment in the United States. Since the passage of FIRRMA and the Export Control Reform Act of 2018 (ECRA), economic statecraft has evolved dramatically, revealing significant gaps in enforcement of export controls and sanctions. The Commission defers to congressional committees regarding the optimal organizational placement of this consolidated authority, recognizing that the primary objective is ensuring America's key offensive tools of economic statecraft are modernized, adequately resourced, and strategically coordinated to address 21st-century threats.

- Congress direct the Intelligence Community (IC) to produce, within 180 days, an assessment of China's support for Russia's war against Ukraine. This report should examine all the var-

ious forms of Chinese assistance and sanctionable activities, including but not limited to economic, technological, military, intelligence, information, and cyber operations, and assess how such support has affected the conduct of the war. In addition to a classified report to the relevant committees of Congress, the IC should be directed to produce an unclassified version suitable for wider dissemination.

- Congress pass legislation to create an Undersea Cable Security Initiative to counter Chinese and Russian sabotage of undersea cables. The legislation should:
 - Ban Chinese vessels from laying, maintaining, and repairing U.S.-invested cables;
 - Direct the U.S. Department of Homeland Security, in coordination with other relevant agencies, to take measures to monitor and secure critical cables, including through the use of sensors, surveillance satellites, and joint coast guard patrols with allies and partners; and
 - Direct the U.S. Department of State, in coordination with other relevant agencies, to work with allies and partners to support the development of a multinational fleet of cable repair ships to respond rapidly to incidents of sabotage.

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