



Training and Doctrine Command G-2
Operational Environment & Threat Analysis Directorate

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Competition in 2035

Anticipating Chinese Exploitation of Operational Environments

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Training and Doctrine Command, G-2
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This study was commissioned by the US Army Mission Command Center of Excellence Irregular Warfare Force Modernization Proponent (IWFMP) in an effort to understand how state and non-state adversaries leverage the strategic environment to their advantage.

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EXECUTIVE SUMMARY

This study assesses how China could exploit conditions of operational environments (OEs) in 2035 to gain strategic advantage on the US. Five case studies examining conditions of the future strategic environment indicate that China's whole-of-nation approach will greatly enable OE exploitation. China will advance its global influence using economic and financial power and exploitation of the information environment, leveraging and shaping the international system for its own interests while constraining others, including the US. Four significant implications for the US Army arise from this analysis: (1) Traditional US Army threat paradigms may not be sufficient for competition, (2) The US Army could be drawn into unanticipated escalation as a result of China's activities during the competition phase, (3) China will undermine US Army military partnerships in 2035, and (4) US Army operations and engagements will be increasingly impacted by the pervasiveness of Chinese goods, technology, infrastructure, and systems.

INTRODUCTION

21st Century military operations are increasingly complex. They cross multiple domains, both affecting and affected by, any or all of the operational variables. They involve myriad state and non-state actors (states, cities, and non-state actors including violent extremist organizations, criminal groups, multinational corporations, non-governmental organizations, and super-empowered individuals). The US Army Multi-Domain Operations (MDO) concept guides the US Army across the competition continuum, which is characterized by a persistent state of competition punctuated by conflict. The US Army's role is to deter adversaries through competition below the threshold of armed conflict and, when necessary, to penetrate, dis-integrate, exploit, and force a return to competition on favorable terms. The US military does not generally associate competition with conventional military operations. However, many of the "2+3" adversaries of the United States are adept at competition and do not make the same distinction between competition and conflict the US does. These competitors are constantly seeking advantage over other actors, and especially the US, across all domains, through all operational variables, and with all instruments of national power. By understanding how, where, and why adversaries are competing, the US Army can compete and succeed by better focusing how it trains, equips, organizes, and employs operational forces and better ensure the Army's readiness to deploy, fight, and win wars.

PURPOSE AND METHODOLOGY

The purpose of this study is provide an assessment how China may exploit the future environment through 2035 to gain strategic advantage, especially in relation to the US. To achieve the study purpose, the following research questions were developed: (a) What conditions will likely shape the strategic environment in 2035?; (b) Of the conditions identified, which are conducive to exploitation by

China?; (c) Based on our understanding of Chinese strategy, *how* and *where* might it exploit the identified conditions in 2035?; (d) What are the implications of the predicted Chinese exploitation for the US Army?

In order to address these questions, this study uses several principal frameworks. First, this study developed a framework that forecasts exploitable conditions in the strategic environment of 2035. This framework in conjunction with an overview of China's national strategy and a projection of how China will look in 2035 provide primary context for discussion of China's anticipated exploitation activities in 2035. These activities are understood in light of specific OE case examination. The report concludes with an assessment of China's anticipated exploitation and suggested implications for the US Army.

As it relates to the development and application of the previous frameworks, analysis was conducted in phases. Each phase involved systematic research and analysis procedures. Analysis was strengthened by leveraging expertise from the US Intelligence Community, the Department of Defense and Department of State communities, academic institutions, and think tanks that specialize in research relevant to this study. The greater methodology utilized case analysis to scrutinize Chinese strategy in light of the 2035 strategic environment and in accordance with specific OEs. OE cases were selected as exemplars of multiple strategic conditions, as well as association with US combatant command priorities and Chinese interests, as stated in official documents. The OEs selected are: Ecuador (USSOUTHCOM), Egypt (USCENTCOM), Nigeria (USAFRICOM), Taiwan (USINDOPACOM), and Turkey (USEUCOM). This approach was designed to understand how China may influence and ultimately gain a strategic advantage against its major competitors—most importantly the United States. For a detailed understanding of the methodology, see Appendix C.

Additionally, this report includes a number of appendices that provide the reader a detailed look into the data and process that resulted in the analysis presented in this report. The appendices are:

Appendix A: Strategic Conditions of the Operational Environment

Appendix B: Operational Environment Case Studies

Appendix C: Methodology

Appendix D: Survey Results

Appendix E: References

COMPETITION IN 2035

US interests and operations are significantly impacted by the conditions of OEs across the MDO competition continuum, but are particularly impacted during competition. Competitors understand the power of not only the conditions in OEs, and their latent impact on US interests and operations, but also understand that exploitation of these conditions could result in a more significant impact, one that can yield an advantage for them and achieve a sort of strategic stand-off from the US. The Army MDO concept introduces this idea of exploitation of conditions by competitors but stops short of identifying *what* conditions are exploitable and vulnerable to exploitation. This study presents a framework of strategic conditions to help the Army begin to address this challenge. Using a combination of traditional analytic tradecraft and qualitative scientific methods, this study identified 24 widely applicable conditions of the 2035 strategic environment that actors could exploit to gain a competitive advantage over the US.

The exploitable strategic conditions that make up the framework are:¹

Persistent State of Competition
Competing Narratives
Erosion of the Liberal World Order
Factionalized and Polarized Societies
Multi-Polar World
Effects of Urbanization
Fragile and Failing States
Dominance of Cities
New International Cooperation Models
Demographic Pressures
Use of Proxies
Resource Competition
Diverse Technology Actors
Economic Inequalities
Information Communication Technology Ubiquity
Specialized Economies
Technology Access Gaps
Interconnected Economies
Technology-Reliant Societies
Infrastructure Capacity Challenges
Crypto-Technology Use
Climate Change
Contested Spaces
Disease Evolution

Additional strategic conditions exist widely, but were determined to be less operationally relevant and thus excluded. Specific OEs may be characterized by unique conditions, but are also excluded in favor of more widely applicable conditions to create a basis for comparison and common understanding across OEs.

CHINA'S STRATEGIC INTERESTS

The supreme art of war is to subdue the enemy without fighting. -Sun Tzu

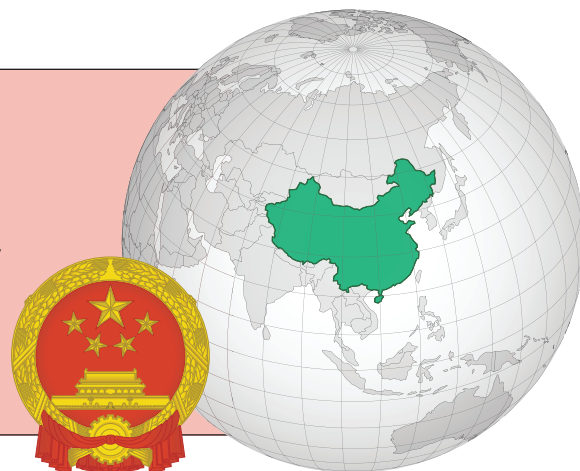
President Xi Jinping's Grand Strategy outlines how the Communist Party of China (CPC) can successfully meet its strategic goals through a whole-of-nation approach by the PRC's 100th Anniversary in 2049. By 2035, the focus date for this study, the PRC will have been using this approach for nearly two decades. China will continue to promote itself as a global partner of choice while employing all of the elements of national power to achieve its strategic objectives.

China in 2035 will be similar to the China of 2019, but many of the trends present today will have advanced and evolved. These will drive Chinese interests and will be reflected in Chinese strategy. China will remain an authoritarian society controlled by the CPC, which will continue to pursue socialism with Chinese characteristics. China's population will have peaked at just under 1.5 billion in 2030 and will have already started to decline. By 2035 more than 20% of the Chinese population will be elderly while less than 20% will be under the age of 18. By 2035, China may be able to challenge the US military in certain key areas. Instead of seeking to match American expeditionary capability or global power projection, the PLA will pursue parity or superiority in fields that will influence conflict in Chinese or neighboring territory and near maritime regions. China will likely achieve many of these objectives by 2035. In particular, China will make tremendous advances in innovative and disruptive capabilities, specifically regarding cyber, artificial intelligence (AI), and machine learning. China will have expanded its diplomatic influence through increasingly outward policies, making significant inroads with partners that are disillusioned or frustrated with the US. China will have expanded its economic stature, with a GDP that will have surpassed the US GDP and will still be growing. China will have made progress reducing its dependence upon foreign energy by pursuing renewable and nuclear power; most of its remaining energy imports will originate in unstable areas like Venezuela for hydrocarbon energy or rare earth elements (REE) found in central, eastern, and southern Africa. The Belt and Road Initiative will have increased China's connectivity and influence globally and it will be a world leader in global information technology, despite concerns from the

¹For definitions of each strategic condition, please see Appendix A.

CHINA'S STRATEGIC OBJECTIVES

- Perpetuate CPC rule
- Maintain internal security and stability
- Sustain economic growth and development
- Defend national sovereignty and territorial integrity (including disputed territories)
- Maintain regional stability
- Secure China's status as a great power
- Safeguard interests abroad



US over Chinese access to information through its systems and equipment. China's military will have continued to improve its ability to project power through force modernization efforts based upon improved equipment. China will be able to challenge the US militarily in the Asia-Pacific and select regions of the world where China has strong economic interests. This is primarily in the "near abroad" areas of NE Asia, SE Asia, and Oceania. Socially and politically, China's economic growth and prosperity are the CPC's main claim to legitimacy. Therefore, the government will continue to quell anti-PRC sentiments with robust information operations, internal security operations, and economic programs aimed at pleasing its acquiescent middle class.

Strategic Objectives

The PRC's principal strategic objective will remain keeping the CPC in power. This enables the CPC to advance its national vision through the Grand Strategy. To keep the CPC in power, China will pursue the intertwined strategic objectives of maintaining domestic stability and sustaining economic growth and development. All other strategic objectives will hinge on these. China will focus on expanding its global economic reach through its investments to advance its global influence. International investment will remain part of a long-term strategy to gain influence, even if it results in short-term financial losses. By developing a wide variety of projects under its One Belt One Road

(OBOR), China will diversify its investments and gain influence around the globe. China will make investments without requiring humanitarian or social provisions, enabling it to build partnerships unavailable to the US or US allies. In addition to collecting debts grown through development investments (sometimes referred to as debt trap diplomacy), China will demonstrate a willingness to forgive debt, but not without some kind of eventual gain. Repayment will not be limited to financial restitution; China will be willing to accept repayment in the form of preferential access to natural resources, access to information (tacit or otherwise), hydrocarbon equity, and in extreme circumstances through the seizure of nationalized industries. Notably, this approach could backfire for the Chinese as it requires both huge resource investment and some degree of risk assumption with its external partners.

Military Reorganization and Modernization

By 2035, China will have implemented the major reorganization of the People's Liberation Army (PLA) begun in 2015 to consolidate Central Military Commission (CMC) power over the military under the leadership of Xi Jinping. Beyond ensuring domestic security and stability throughout territories claimed by China, China will continue to use the military as a deterrent, to support promotion of China's global image, and to facilitate its economic and political objectives overseas. This



CHINA'S THREE WARFARES

- Psychological warfare uses propaganda, deception, threats, and coercion to affect the adversary's decision-making capability.
- Public opinion warfare disseminates information for public consumption to guide and influence public opinion and gain support from domestic and international audiences.
- Legal warfare uses international and domestic laws to gain international support, manage political repercussions, and sway target audiences.

CHINA'S PREFERRED CONDITIONS AND METHODS

<p>China's Approach to Exploitation</p> <p>China's whole-of-nation approach, which involves synchronization of actions across government, military, and industry, will facilitate exploitation of OEs and enable it to gain global influence through economic exploitation.</p> <p>China will leverage the international system to advance its own interests while attempting to constrain others, including the US.</p>	PREFERRED CONDITIONS	PREFERRED METHODS
	Infrastructure Capacity Challenges	China targets undeveloped and fragile environments where their capital investments, technology, and human capital can produce financial gains and generate political influence.
	Interconnected Economies	China looks for partners and opportunities to become a significant stakeholder in a wide variety of economies in order to capitalize on its investments as well as generate political influence.
	Specialized Economies	China looks for opportunities to partner with specialized markets and leverage their vulnerabilities for gain.
	Technology Access Gaps	China targets areas where their capital investments in technology provide partners with key resources and competitive advantages by filling technology gaps.

will be accomplished through force posturing and employing China's three warfares: Public Opinion Warfare, Psychological Warfare, and Legal Warfare. In addition, the PLA's modernization efforts will continue to be conducted with this in mind, including expanding its operational reach through an enlarged Peoples Liberation Army Navy (PLAN), the creation of a marine force, and the expansion of its airlift and strike capacity. China will need to resolve its joint interoperability issues as this continues to be problematic for the PLA's broader strategy. Nevertheless, China will continue to be a leading contributor of both funding and peacekeeping forces to the United Nations.

By employing a whole-of-nation approach, China will seek to establish global reach and ultimately protracted global influence, ensuring that China's prominence as a global power extends through all instruments of national power, with military power in a secondary role. This approach is centered on *shih*, a Chinese strategic approach that is difficult to translate; but can be interpreted as "strategic advantage" or "propensity born out of disposition." *Shih* is not a static potential, but rather relative potential that changes as circumstances change generated by things that have to be harnessed (i.e., conditions in the environment). The PRC will leverage *shih* through its exploitation of conditions of operational environments to further its position and influence.

CHINESE NATIONAL POWER CREATES COMPETITIVE ADVANTAGE

The results of this study indicate China will likely capitalize on its preferred instruments of

economic and financial power in coordination with information power. The case studies show that China's recurrent methods to expand influence will include infrastructure investment, trade in exchange for cooperation, procurement of foreign technology, and financial manipulation (including lending and leveraging debt). Underpinning these economic actions will be political and diplomatic influence, which translate into undermining alliances, isolating adversaries, and positioning China as an alternative to legacy partners, especially the US.

China will have the capability and will to apply all instruments of national power (Diplomatic, Information, Military, Economic, Financial, Intelligence, and Law Enforcement) in its efforts to exploit operational environments, but will likely use military power as a last resort. The possible exception could be Taiwan, because China does not view Taiwan as a legitimate government. China treats Taiwan as a domestic concern rather than a foreign policy issue, and continues to demonstrate its willingness to use military power domestically to achieve objectives. However, even in the case of Taiwan, China will be unlikely to use direct military action unless forced to do so, as the military, political and diplomatic prices of any attack could endanger domestic stability and international economic interests. Instead, this projected Taiwan case demonstrates China's use of its military as a coercive instrument to deter competitors below the threshold of armed conflict. These practices are consistent with the traditional Chinese military principle of *shih* - developing relative advantage by exploiting conditions as they are favorable; Sun Tzu's acclamation of the highest form of

generalship as winning without fighting; Mao's military strategy of building strength while avoiding decisive confrontation; the modern Chinese "three wars" strategy of using public opinion warfare, psychological warfare, and legal warfare; and Marxist ideology of expanding power through the control of the means (investments) and modes (systems) of production.

IMPLICATIONS

China's exploitation of OEs will be greatly enabled by its whole-of-nation approach, which involves synchronization of actions across government, military, and industry. China will continue to gain global influence through application of economic and financial power and exploitation of the information environment using its three warfare approach and leveraging and shaping the existing international system to advance its own interests while attempting to constrain others, including the US.

China's whole-of-nation approach to competition will likely have the following implications for the US Army:

Traditional US Army threat paradigms may not be sufficient for competition.

The US Army's current threat paradigm emphasizes the *military* capabilities of state and non-state adversaries. China demonstrates that adversaries of the future are not likely to engage in competition, or conflict, by relying solely on their military capabilities and, conversely, that their militaries (in a non-traditional role) will be active enablers in achieving objectives in competition through other elements of national power. The US Army is likely to be confronted with adversaries executing a coordinated whole-of-nation approach during both competition and conflict. Generating an understanding of an adversary based solely, or predominantly, on its traditional military roles and capabilities creates a critical gap in understanding of the holistic threat that results from an adversary's intent and the breadth of its capabilities. China employs all of its instruments of national power in conjunction with its industrial complex and the information instrument of power to achieve its desired effects. The US Army's threat paradigm must account for this phenomenon.

The US Army could be drawn into unanticipated escalation as a result of China's activities during the competition phase.

Persistent competition in 2035 will challenge how competitors observe, understand, act, and react to the actions of others. China's actions during the competition phase will skirt the threshold between competition and conflict, pushing boundaries in order to gain advantage over the US. This deliberate pushing of boundaries creates the potential for unanticipated escalation due to miscalculation or misunderstanding. If China executes actions in the guise of competition that inadvertently crosses an unknown threshold, it may invoke a military response from the US. Conversely, China may perceive US actions as violating expectations for competition, increasing the risk of conflict.

US Army military partnerships will likely be undermined by China in 2035.

Undermining the partnerships of competitors is fundamental to Chinese strategic thought. China is unconstrained by the same legal and ethical limitations as the US and therefore is able to accomplish its objectives more freely without these restrictions. Moreover, China's economic and financial power in 2035 will increase its influence over US partners and potential partners in both competition and conflict. Should China oppose US actions or otherwise seek to thwart the US, it will have the ability to use coercive economic and financial power to limit or prevent partner involvement with the US.

US Army operations and engagements will be increasingly impacted by the pervasiveness of Chinese goods, technology, infrastructure, and systems.

By 2035, the US Army will increasingly have to work with partners and in environments that are reliant on Chinese-supplied and/or controlled equipment, infrastructure, and systems. This may challenge compatibility with US systems and the US may be challenged to support sustainment of these systems. In some cases, particularly with electronic and communications equipment, they could represent a threat to the utility, integrity, and security of US systems. US INFOSEC and OPSEC could be at risk due to ubiquity of Chinese information communication technology that by Chinese law, and potentially by design, is accessible to the PRC. US entities could also encounter delays, disruptions, or denials of use of facilities and systems that are directly or indirectly controlled by Chinese entities.

Appendix A: Glossary of Conditions

Conditions of the Strategic Environment to 2035

ICON	CONDITION	DEFINITION
	Climate Change	Change in global or regional climate patterns resultant from the cumulative effects of global mean surface temperature increase.
	Competing Narratives	Explanations or interpretations of events/ideas originating from a particular perspective and presented to a target audience in order to gain influence.
	Contested Spaces	The physical, cognitive, or heterotopic spheres of competition.
	Crypto-technology Use	The utilization of encryption technology that enables increased security for the transmission and storage of data.
	Demographic Pressures	Factors within a population that reduce the ability of an environment to support that population.
	Disease Evolution	The emergence of new and/or evolved pathogens that impact the way people live.
	Diverse Technology Actors	Non-traditional technology leaders are emerging to compete with traditional technology leaders as new technologies emerge and are implemented globally.
	Dominance of Cities	Concentration of regional/global power in Census Metropolitan Areas (CMA), for example, CMAs may generate a majority of the GDP of a state.
	Economic Inequalities	Unequal distribution of income, wealth, and economic opportunity.
	Effects of Urbanization	Consequences associated with increasingly urbanized populations, for example, pollution, poverty, resource scarcity, etc.
	Erosion of the Liberal World Order	The shift of state and non-state actors from 20th century liberalism to a realist pursuit of self-interests ahead of collective interests, while ignoring or subverting existing international structures and norms.
	Factionalized and Polarized Societies	Societies characterized by increasing divisiveness as a result of conflicting or competing identities.
	Fragile and Failing States	A fragile state is characterized by weak state capacity or weak state legitimacy leaving citizens vulnerable to a range of shocks. A failing state refers to a political body disintegrating toward the point where basic conditions and responsibilities of a sovereign government no longer function properly.
	Information Communication Technology Ubiquity	Near universal access to information and communication around the globe.
	Infrastructure Capacity Challenges	Inadequacy of current systems to meet the needs/challenges of the population.
	Interconnected Economies	Economic systems that are linked to other economic systems.
	Multi-Polar World	A global environment where power is distributed among three or more significant poles (states), each with the ability to generate wealth and/or military capability that can/may threaten other interests and attract other actors into their spheres of influence.
	New International Cooperation Models	The development of new regionalized and specific cooperative agreements, relationships, and institutions that replace or challenge existing agreements, relationships, and institutions.
	Persistent State of Competition	Diverse transnational actors (states, cities, and nonstate actors including VEOs, criminal groups, MNCs, empowered individuals, etc.) compete through all instruments of power (Diplomatic, Information, Military, Economic, Financial, Intelligence, and Legal) and across all domains (Sea, Land, Air, Space, and Cyberspace).
	Resource Competition	Contest between actors to secure needed or desired resources.
	Specialized Economies	Economies focused on a limited scope of goods and services to gain an advantage within a market.
	Technology Access Gaps	Technological advancements and access will vary globally and be primarily available to those with control over its distribution and use.
	Technology-Reliant Societies	Societies are embracing and becoming increasingly reliant upon the digitalization of every aspect of their lives.
	Use of Proxies	Widespread use of surrogates by both state and nonstate actors to further their interests indirectly and with reduced direct risk.

Appendix B: OE Case Studies

Case analysis was used to analyze China's strategy in specific OEs in order to understand how it might create influence and ultimately strategic advantage against its major competitors—most importantly the United States. Potential Chinese actions were identified by examining current and forecast trends and applying Chinese strategy, interests, and capabilities in the context of the future strategic environment conditions. OE cases were selected based on priorities of US combatant commands and Chinese interests as stated in official documents. The OEs selected are:

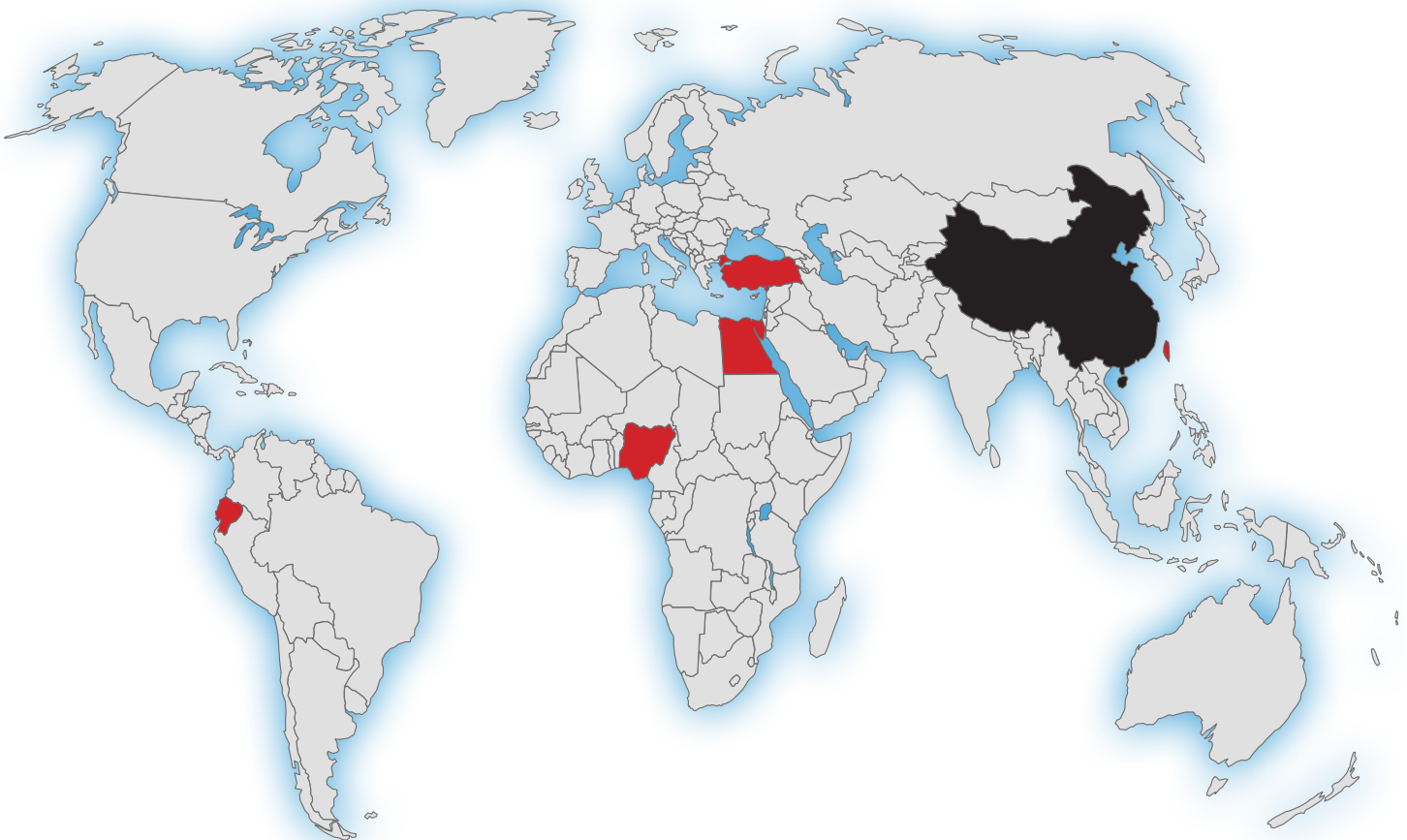
Ecuador (USSOUTHCOM)

Egypt (USCENTCOM)

Nigeria (USAFRICOM)

Taiwan (USINDOPACOM)

Turkey (USEUCOM)





Case study Ecuador

2035 OVERVIEW

POLITICAL

Polarized and Alternating Domestic Politics Shaped by Foreign Influence

By 2035, the turmoil following the 2016 Presidential Election, during which then-President Moreno abandoned the leftist platform on which he was elected, will have continued to have a negative impact upon Ecuador's historically turbulent political environment. Control of the Ecuadorian government will have alternated between pro-western democratic governments, nationalized Bolivarianism, and interim military juntas. With each change of direction, those in power will likely have tried to isolate and alienate their political opposition. The rapid and radical internal political shifts will have been accompanied by shifts either toward or away from the influence of the United States or the People's Republic of China.

MILITARY

Limited Regional Capacity with Strong Domestic Economic and Political influence.

By 2035, the Ecuadorian military's primary role will continue to be to ensure territorial sovereignty and domestic stability. Following the cessation of hostilities over territory disputes with Peru in the early 2000's, the military will have shifted its emphasis away from state conflict and toward regional cooperation to counter transnational organized criminal activity. Ecuador's military will have remained small compared to other regional actors. Domestic political tensions will have limited the military's ability to develop lasting partnerships with either the United States or China, resulting in a patchwork of military equipment imported from a wide range of sources. Ecuador's military will maintain a large degree of economic influence, and will likely be willing to exert temporary control over the government if needed.

ECONOMIC

Economic Vulnerability due to dependence on Petroleum and Predatory Debt

Ecuador's economy in 2035 will still be developing, and thus will be dependent upon foreign investment vulnerable to fluctuations in the global petroleum market. Ecuador's ability to attract foreign investments will be extremely limited due



to its history of defaulting on large loans and the inconsistent economic agendas of successive administrations. This will have left the Ecuadorian government vulnerable to predatory lending practices from both foreign states and private entities as it attempts to modernize its growing urban centers and remain economically competitive within Latin America. So far, Ecuador will likely have avoided defaulting on these predatory loans, however debt repayment will remain an issue of contention in domestic politics due to the fact that many of the predatory loans would be backed by oil shipments allowing for the seizure of national assets should Ecuador default on any loans.

SOCIAL

Minorities and Rural Populations lack Economic Opportunities

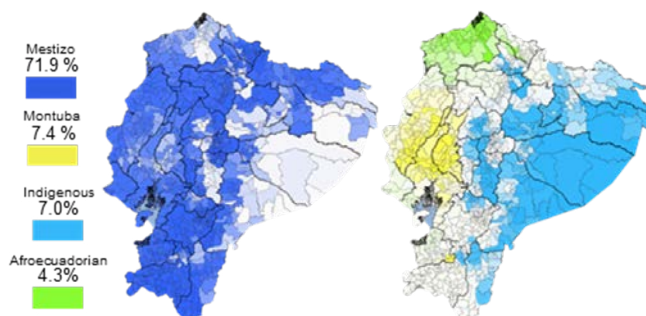
By 2035, approximately two thirds of the 20.5 million people living in Ecuador will live in urban environments. The ethnic Mestizo population has a large majority throughout all major areas of the country. Minority groups such as the Montubia, Afroecuadorians, and indigenous peoples continue to be concentrated in regional enclaves. While the average Ecuadorian's income will have increased with the rise of GDP (PPP), the economic divide between rural and urban residents, and between non-minorities and minorities is an issue of contention.

INFRASTRUCTURE

Investment and Modernization Driven by Population Density and Economic Opportunity.

In 2035, development and modernization within Ecuador will have occurred at an uneven pace. Urban centers will have been able to modernize and expand as the population continued to urbanize. Domestic emphasis on modernization will have enabled the digitization of urban centers, however, the Ecuadorian tech sector will have been unable to compete with foreign countries and will remain dependent upon inexpensive tech imports. Modernization will be limited to cities, as the physical geography limits development and investment in the infrastructure of the Amazonian region will be limited to supporting the petroleum industry rather than the primarily indigenous rural populations.

Majority & Select Minority Population Distribution



INFORMATION

Internet Availability Shapes the Information Environment

The continuously shifting political orientation of Ecuador will have created a relatively open media environment, however the government will maintain the legal authority to exert control over media outlets in times of distress. The rural-urban divide will be apparent in the population's access to the internet. Ecuador's rural populations, who may have less exposure to modern technology, are more likely to be digitally illiterate and lack dependable access to the internet that the

urban populations. Ecuador will continue to make efforts to expand internet access, but due to a lack of investor interest in rural communities, these efforts will be dependent upon lower quality, cheaper imported technologies.

PHYSICAL ENVIRONMENT

Geographic Barriers Shape the Nation

The Andes Mountains dominate the Ecuadorian landscape, dividing the nation into three separate regions: La Costa to the west, La Sierra in the Andean range, and the sparsely inhabited jungle region of La Amazonia.

CHINESE EXPLOITATION

ELECTORAL INFLUENCE

By 2035 the People's Republic of China will be heavily invested in Ecuador and will benefit from having a leftist Bolivarian government in Quito. China could seek to manipulate Ecuador's economy in order to ensure that a pro-western government does not win any elections. China continues to have a near monopoly on the Ecuadorian petroleum industry, and will hold an inordinate amount of Ecuadorian debt. China could easily manipulate the Ecuadorian economy to influence elections to the detriment of pro-western candidates. China's willingness to forgive debt, or to enforce collection, could not only shape the outcome of elections, but could also shape the platforms of political parties.

HYDROCARBON LEVERAGE

While the United States may remain the ultimate destination for Ecuadorian oil, China could have positioned itself in a way that gives it control of the Ecuadorian hydrocarbon market. China has already utilized predatory lending practices that allow for debt to be repaid with crude oil. By 2035, the conditions of these predatory loans will have also required Ecuador to waive the rights to many of its national hydrocarbon assets should they default on their loans.

TECH-CENTRIC DEVELOPMENT AND MODERNIZATION

The Chinese tech-sector specializes in the manufacture and export of low-cost, modern technology, which is a main focus of China's international trade and investment. In 2035, this low-cost technology will have flooded the Ecuadorian market in order to satisfy the Ecuadorian government's need to quickly modernize its economy, military, and infrastructure. The ubiquity of Chinese technology in the lives of both urban and rural Ecuadorians will not only shape the general population's opinion of China, but may give China a greater degree of influence over Ecuador's security apparatus.

LACK OF CREDIT OPPORTUNITIES

Ecuador's precarious standing with global creditors has left it with few options for covering its financial needs. In lieu of traditional lenders like the International Monetary Fund, China has stepped in as a lender. China's goal is to become the partner of choice for Ecuador (and many other countries). However, a lack of lending competition will enable China to impose terms on the loans it offers to the Ecuadorian government that could potentially force it to sacrifice a large degree of political and economic sovereignty in order to guarantee its debt.

IMPLICATIONS

Ecuador's political orientation represents the crux of the competition for influence in Ecuador between the United States and China. Through the use of predatory lending practices and low-cost technology exports, China will be able to selectively promote or inhibit Ecuador's economy and influence government practices and future elections in their favor. By ingraining itself into Ecuador's political environment, dominating its economy, and influencing technological modernization of infrastructure with inexpensive goods, China will be able to advance its agenda and expand its influence into Latin America and gain an edge during competition without needing to use military power.





Case study Egypt

2035 OVERVIEW

POLITICAL

Transition from the Sisi Era

The Egyptian Parliament has extended the Abdel Fattah el-Sisi administration until 2030, at which time President Sisi will be 76 years old. By 2035, Egypt will still likely be led by Sisi or his designated successor. Although there is potential for a tumultuous transition, major long-term change is unlikely and the secular government would likely subdue any popular interest in Islamist rule. Internationally, Israel will remain a complex international relationship, but Egypt's primary concern will be external support of political Islam. Contentious relations with Ethiopia over the Grand Ethiopian Renaissance Dam and Nile water rights will have eased by 2035.

MILITARY

Domestic Security and Canal Protection

The primary missions of Egypt's military will remain domestic security and protection of resources, especially the Suez Canal but also maritime boundaries in the Mediterranean and Red Sea. The Egyptian army will be balancing its push to professionalize and modernize its force with its legacy massive number of conscripts. Egyptian armed forces and security services make tactical advances on threats that emerge, Egypt has not made – nor appears likely to make – progress resolving underlying grievances, so domestic security challenges from opposition and insurgent groups are likely to continue to 2035.

ECONOMIC

Egypt Joins Top Ten Largest Economies

Egypt is expected to become the 7th largest world economy by 2030 (from 21st in 2018). Major sectors of the economy include energy (although Egypt consumes its oil and renewables, it is a net exporter of natural gas) and tourism. Egypt will be increasingly reliant upon food imports, particularly



wheat. The Suez Canal, which currently is a transit means for 10% of global trade, will remain the primary maritime route connecting Europe with the Indo-Pacific and thus retain strategic importance.

SOCIAL

Urban Assimilation but Rural Isolation

Egypt's population will near 120 million in 2035. The Muslim population will remain the vast majority. The largest religious minority, the Copts, will not increase proportionately to the overall population, so their influence will be relatively reduced. Under the control of Sisi, the government will remain secular until at least 2030. Ethnic Egyptians are and will remain the dominant ethnic group. Urban minorities such as the Nubians will remain but will be increasingly assimilated by 2035. Rural minorities, such as the Bedouin and Beja, do not appear to be assimilating in the same degree and will likely remain marginalized.

INFRASTRUCTURE

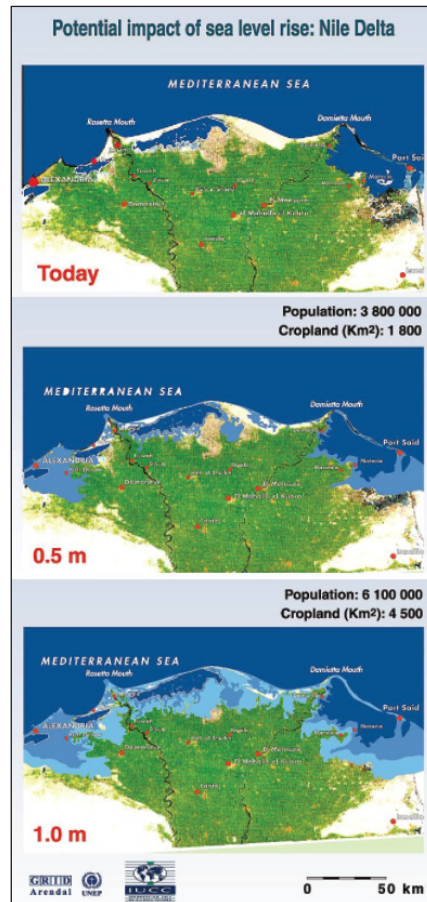
Increasing Strains on Concentrated Population

Egypt's infrastructure will face multiple challenges by 2035. The population will experience nearly 30% growth between 2020 and 2035, with the vast majority concentrated along the Nile and in the delta. The New Administrative Capital will be an operational, modern, smart city. Much progress will have been made building and repairing roads and airports throughout Egypt, improving the rail and metro system, and developing the Red Sea littoral. Traffic through the Suez Canal will increase as trade between Europe and Asia continues to grow and interconnect. The aging High Dam at Aswan will be challenged to meet demands.

INFORMATION

Media Dominance but Not Monopoly

By 2035, Egypt's dominance of Arab media and entertainment will have been eclipsed by regional competitors. Nevertheless, Egypt will retain significant influence in the Arab world because of its position as the most populous Arab country and in the Islamic world because of its educational institutions. Egypt's influence in Africa will likely have grown because of its military, economic, and cultural power. Domestically, Egypt will have established a wide-ranging, national-level surveillance mechanism using Chinese technology.



PHYSICAL ENVIRONMENT

Loss of Food Production Lands

Egypt's primary agricultural production region, the Nile delta, will continue to lose land and aquifer by 2035. This loss will be caused by climate change-caused rising sea levels and a lack of sedimentary replenishment due to the Aswan dams. Combined

with urban expansion, Egypt's agricultural production capability will be reduced while food requirements rise with increased population. Egypt will be continuing reclamation endeavors and development of new agricultural and population areas. Egypt will still be dependent upon the Nile for water, energy, and food.

CHINESE EXPLOITATION

China launched a comprehensive strategic partnership with Egypt in 2014 and leaders of both countries committed to expanding the partnership in 2018, which is likely to expand by 2035. China's key involvement will range from development, particularly in and around the Suez Canal, to security cooperation and counter-terrorism.

LEVERAGING CHOKE POINTS

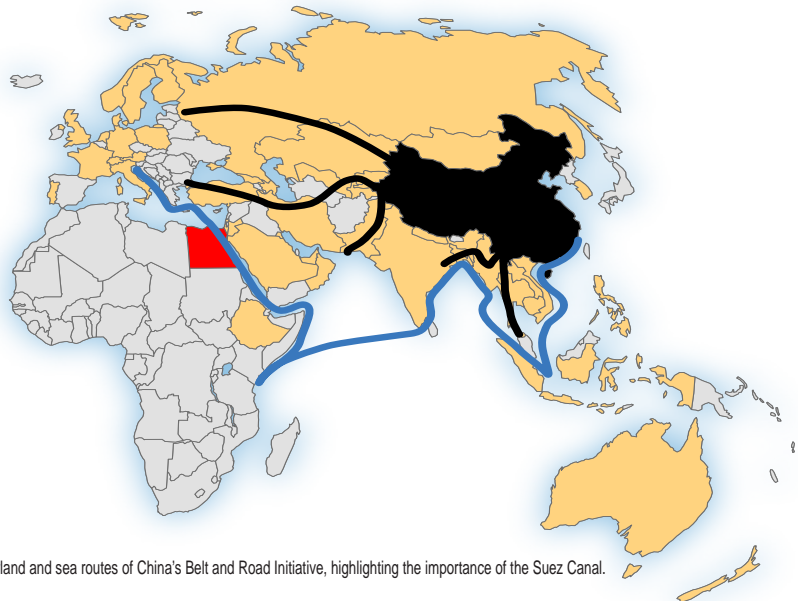
Egypt has been building a large economic trade zone near the Suez Canal and conducting canal modernization projects. China, a primary investor in the canal and trade zone infrastructure, will incorporate the canal as a critical node in One Belt One Road Initiative (OBOR). Canal traffic and revenues will continue to increase; since China is a major beneficiary of the canal, Chinese economic investment in the canal and interest in security of the canal will grow as well. By 2035, China will remain a significant investor in the canal economic zone and will view the canal as critical to Chinese security interests, although Egypt will continue to maintain control and resist any foreign controlling interest.

RESCUING TRADE REQUIREMENTS OF A GROWING POPULATION

China embraced Egypt's need for more trading partners in the mid-2010s and will continue to increase this relationship through 2035 and beyond. Since the launch of the comprehensive strategic partnership, trade volume between China and Egypt has dramatically increased. While China is not in the top five export destinations from Egypt, the amount of Egyptian goods exported to China is expected to continue to grow. Trade spans all sectors including energy, textiles, culture and tourism (a major sector of the Egyptian economy), and defense – including sales of Chinese advanced weapons systems such as unmanned aerial systems (UASs). By 2035, Egypt's economy will be increasingly dependent upon China.

EXPANDING DEBT TRAPS

To expand China's financial influence over Egypt, Chinese companies will increase construction projects in Egypt's planned new administrative capital, an initiative launched to mitigate the challenges of overcrowding in Cairo. Ultimately, the new capital will be built on an underlying Chinese technology infrastructure. Additionally, Chinese companies are building or have built numerous facilities in Egypt, including a petrochemical plant, transportation infrastructure, a water storage facility, a textile industrial park, and a coal plant, to name a few. In total, more than 1,000 Chinese companies operate in Egypt in 2019; thousands more can be expected by 2035. Egypt is borrowing funds from China for its expanded infrastructure projects despite concerns of predatory lending. By 2035, even if Egypt is not entangled in a Chinese debt-trap, it will carry significant Chinese debt and potentially increased Chinese influence.



Overland and sea routes of China's Belt and Road Initiative, highlighting the importance of the Suez Canal.

IMPLICATIONS

As the most populous Arab-speaking country and a major source of Arab media, Egypt exerts soft power across the Arab-speaking Middle East; China could also exert influence on the Arab world and the Middle East regionally through Egypt's influence. It is also a major economic and diplomatic power in Africa and it is the most populous and most powerful country bordering Israel. China's increasing influence in Egypt could potentially lead to an ability to displace the US as partner of choice in Egypt and, through Egypt, advance Chinese interests across Africa and the Middle East to the detriment of US interests

Egypt is key terrain for the US. It is a strategic location for a US partnership in the Middle East and it is a critical global partner in the Arab/Muslim world. Furthermore, the Suez Canal's value to the US is essential for maritime movement and sustainment of forces in the USCENTCOM and much of the USAFRICOM AORs. China's increased dependence upon the Suez Canal route will also make it strategically critical to China – enough so that China could see the need to intervene politically or militarily if Chinese trade is threatened by instability in the Sinai. China's control of infrastructure along the canal would allow China access to US forces transiting, whether for intelligence collection or even, in an extreme case, disruption if conflict should occur.



Case study Nigeria



2035 OVERVIEW

POLITICAL

Impact of Demographic shifts and Identity Politics

Politics within Nigeria will be heavily influenced by social identity in 2035. Ethnolinguistic diversity and religious orientation will play a major role in shaping the population's perception of local and national governments. Major demographic shifts occurring as a result of internal migration and urbanization will shape regional and national politics. In many areas Nigeria will reject the integration of domestic and international migrants into their communities by creating legal hurdles that limit migrant land ownership and voting rights. At a national level, uneven investment in regional development and perceived corruption continue to pose challenges to functioning governance.

MILITARY

Strain of near-constant domestic conflict has hindered modernization

By 2035 the Nigerian military will have maintained its status as one of the largest militaries in Africa, pulling from Africa's largest pool of potential manpower, although corruption, inadequate training, and domestic instability continue to limit the force's effectiveness. Nigeria's military will likely have a reduced role in regional peace-keeping and will place more emphasis on increasing domestic stability, seeking to reduce violent extremism in the nation's north, mitigate religious/ethnic/economic violence across the central belt, and secure the oil rich Niger River Delta. Decades of domestic conflict and internal corruption will have shaped the Nigerian military into a domestic policing force that will require dramatic investment to modernize and reorient if it needs to focus on an external state-based threat.

ECONOMIC

Hydrocarbon Powerhouse Challenged by Increasing Demographic Pressures

The Nigerian economy in 2035 will continue to be one of the strongest in sub-Saharan Africa, acting as a regional conduit through which smaller African economies engage with global markets. Despite attempts to diversify its economy, the hydrocarbon industry will continue to be the major economic driver in Nigeria. As a result of an emphasis on hydrocarbon extraction, Nigeria will continue to export the majority of its unrefined petroleum products and will continue to struggle to inject affordable refined petroleum products into its domestic market. Nigeria's agricultural sector will have experienced large-scale reform in order to modernize and streamline the industry. Despite decades of reform, environmental degradation and continued conflict will limit the agricultural sector's ability to reach its potential. Domestic demand will continue to outstrip the domestically available supply of agricultural/food products within Nigeria, which will lead to a higher risk of food scarcity in heavily populated urban environments and isolated rural communities.

SOCIAL

A Diverse Population Hinders the Development of a Single National Identity

In 2035 Nigeria will be one of the largest populations in the world, containing roughly 20% of Africa's total population. In under a century, Nigeria's population will have grown from under 50 million to almost 300 million. As the home to over 250 distinct ethnolinguistic groups, Nigeria's population will likely remain sharply divided by social and religious identities. The Nigerian government will be unsuccessful in its efforts to directly promote a single national identity; however, increases in national fervor will coincide with success during professional sports competitions on the international stage.

INFRASTRUCTURE

Challenged by Demographic Pressures and Uneven Investment

Nigeria's infrastructure in 2035 will have long been plagued by uneven development. The rapid population growth and high rate of migration and urbanization will be stressing Nigeria's existing infrastructure and quickly outpacing the development of new infrastructure. Rapidly growing urban centers and economic hubs, like Lagos and Abuja, have received the majority of investment through programs like the 2017 *Nigeria Smart City Initiative*, while the infrastructure in rural communities has continued lag behind.

INFORMATION

Perception and Reality Differ Based upon Source

Nigeria's population will have broad access to diverse information sources in 2035. This means that the population may be better informed than ever before. However, the existing social and political fractures within Nigerian society will create an information environment characterized by selective identity-based perspectives and lead to a lack of trust between competing communities. Perceptions of ethnolinguistic, religious, and regional biases will continue to hinder the population's ability to trust information provided by the government.

PHYSICAL ENVIRONMENT

Natural Terrain Shaping the Human Terrain

Nigeria is bisected by the Niger and Benue Rivers, which converge in central Nigeria and flow through the Niger River Delta and into the Gulf of Guinea. The natural boundaries formed by the Niger and Benue rivers have influenced the development of ethnolinguistic identities and cultures. The Jos Plateau is the most prominent geographic feature in Nigeria, impacting the natural watershed either toward the Gulf of Guinea or the Lake Chad Basin. Nigeria's climate ranges from tropical rainforest to the south, woody savannah in the middle belt, to arid steppe and desert in the North. Soil degradation and climate change have led to an increased rate of desertification throughout much of northern Nigeria.



Nigerian terrain

CHINESE EXPLOITATION

MODERNIZATION THROUGH CHINESE TECHNOLOGY

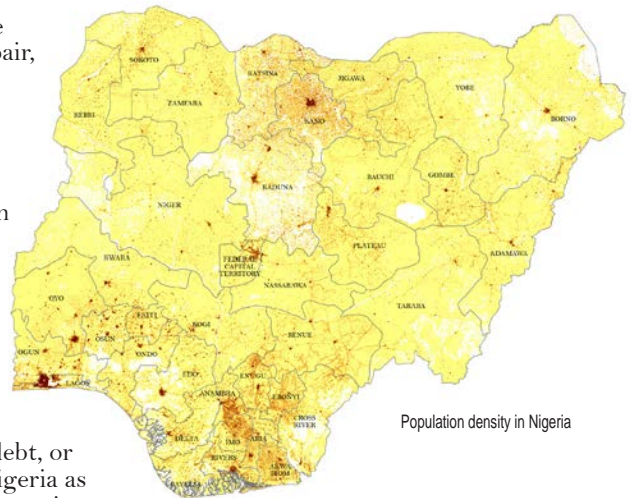
As Nigeria's government seeks to diminish perceptions of corruption and regional biases, China may exploit Nigeria's need for modernization to its advantage, by helping to finance Nigeria's satellite programs, and bringing digital technology into rural communities. The 10,000 African Villages Project, a Chinese investment initiative aimed at reducing the digital divide throughout rural Africa, will have evolved from focusing on satellite television toward including both telecommunications and internet access as well. China could also be a primary contributor to urban modernization projects that seek to create smart cities through the use of ICTs and computer learning models. These projects will not only expand China's visibility throughout Nigeria in a positive manner, they will have created a market for Chinese technology that could create a monopoly on the type of information available to both urban and rural communities. China's involvement in Nigerian modernization projects will give them a detailed understanding of, and potentially access to, Nigeria's critical infrastructure systems.

INTERCONNECTED ECONOMIES

As the economic hub for central Africa, Nigeria's economy can be pressured from above and below. China's increased economic presence throughout Africa can influence how smaller sub-Saharan economies choose to engage in international trade. This in turn will place pressure on Nigeria to maintain access to Chinese markets and goods or risk a decline in regional economic influence. China's ability to exert economic pressure and influence markets will be used both directly and indirectly to shape Nigeria's population into an amenable market for Chinese exports and to secure a source for hydrocarbon imports.

INFRASTRUCTURE CAPACITY CHALLENGES

Nigeria's rapid population growth, coupled with large scale urbanization, will necessitate large scale investment to repair, modernize, and expand its infrastructure. In order to address these challenges in both high density urban and remote rural areas, Nigeria will need to rely upon foreign investment. China will be able to exploit Nigeria's need for investment by offering enticing loans that are hedged by Nigeria's hydrocarbon industry. China could utilize predatory lending practices to trap Nigeria in debt, or it may view investment in Nigeria as an opportunity to build influence in Africa's largest state.

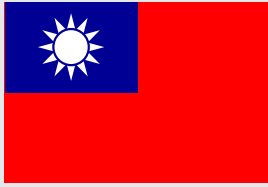


Population density in Nigeria

IMPLICATIONS

By 2035 Nigeria will be facing a number of intractable challenges that could imperil stability if they are not addressed. China will have positioned itself as a partner of choice, not only for the Nigerian government but also for the Nigerian people. Chinese investment in Nigeria's rural infrastructure will create a substantial presence for the Chinese government within the daily lives of many Nigerian people, both urban and rural, and enable China to develop and exert influence through economic and political networks. Notably, China's nationalized industries will be better positioned to synchronize their activities with China's overarching strategic interests. By contrast, the official presence of the United States will continue to be limited, with most Nigerians coming into contact with the US through private firms and entities that likely have their own agenda, potentially not in line with the US government's agenda.

By taking actions to shape Nigeria's economic, political, and information spheres, any potential Chinese military activity in the area will be able to build off of the trust developed through the utilization of a synchronized strategy across the presence of all Chinese entities (official government and military entities as well as state-owned industries) in the OE. Chinese military advisors will likely benefit from China's positive image within Nigeria, while the US military may find itself challenged by a less synchronized US entity presence in the OE, thus giving China a significant advantage.



Case study Taiwan

2035 OVERVIEW

POLITICAL

Taiwan Split over Independence; Increasingly a Pawn in Sino-US Relations

Actions by China in its various territories and towards Taiwan specifically will split Taiwan politically concerning independence. By 2035, Taiwanese politics will be polarized between the pro-unification KMT and the pro-independence DPP. Taiwan will be increasingly isolated by the PRC's global pressures and have few diplomatic relationships. These will include the US, but US-Taiwan relations will experience wide swings as the relationship will be dependent on which party is in power in Taiwan, who is in leadership in the United States, and the degree of pressure from China. Taiwan will be repeatedly caught between Chinese and US tensions. Most Taiwanese will remain in support of cross-strait relations, but the majority will not support the "one country, two systems" model.

MILITARY

The Taiwan Relations Act Reaffirmed as the ROC Transforms its Military

China's aggressive actions in several territories (e.g., Hong Kong and Tibet) along with failed attempts at a volunteer ROC military will lead to significant changes by 2035. The Taiwan Relations Act will be reaffirmed, increasing trust in the US, with a possible Mutual Defense Treaty developing between the US and Taiwan. This relationship will enable the ROC to transition to a more robust Anti-Access and Area Denial Strategy and develop a more agile, capable, and high-tech force, enabled by US military technology, renewed patriotism, and an improved ability to recruit, train, and equip soldiers. The result will be an increased capability to inflict too high a cost for the PLA attempt to reunify by force.

ECONOMIC

Interdependence with China Significantly Reduced

By 2035, economic relations between the ROC and the PRC will have deteriorated. The PRC will have drained Taiwanese economic expertise and reduced the number of employed Taiwanese on the mainland by more than 50%. Chinese capital investment will fall to record lows. To counter this, the ROC will reduce Chinese involvement in its export sector and liberalize its investment framework. Taiwan will significantly increase its economic ties with the US, the Philippines, and Japan to offset trade lost with China and will move its expertise, investment, and technological proficiency to SE Asia. Economically, Taiwan will remain competitive but high housing prices, youth unemployment, job security, and financial security in retirement will remain important concerns as population growth plateaus and Taiwan's population rapidly ages.

SOCIAL

Identity Politics Replaced by Unification Politics

By 2035, the majority of the population will identify strictly as Taiwanese. The principal political divide will be between those who are pro-unification and those who are pro-independence. Population shrinkage, aging, brain drain, and income inequality will be significant problems. By 2035, the population will have dropped by 7% with additional decrease in the coming years. The number of foreigners living in Taiwan will already be growing faster than Taiwanese citizens.



INFRASTRUCTURE

Taiwan Moves to More Renewable Energy

By the mid-2020s, Taiwan's energy consumption will have created an energy crisis, but by 2035 the island will have developed a reliable, affordable, and environmentally-sustainable energy profile. A world-class transportation grid and state-of-the-art air and seaport facilities will also foster economic growth. Taiwan will be less energy dependent, and could be competing with China over advanced renewable technologies.

INFORMATION

CPC Metanarrative Fuels Political Divide

The CPC will persist in its attempts to infiltrate Taiwanese society with a master narrative about the triumphant path of socialism under Chinese characteristics. By 2035, Beijing will intensify attempts to penetrate society through media inoculation which will feed contentious competing narratives, and fuel political and social divisions. The Taiwanese will continue to exercise freedom of speech with public debate over domestic and foreign issues.

PHYSICAL ENVIRONMENT

Climate Change Impact Island Sea Levels

Taiwan's string of islands in the Taiwan Strait and historical claims to the waters in the South China Sea will continue to be important for Taiwan's defensive posture. Taiwan's terrain is highly defensible due to limited landing beaches, rugged mountains, and vast mudflats, and is dominated by several large urban areas. Climate change will create structural concern for Taiwan's large urban areas, port facilities, and critical arable land, which will be perceived at risk of sinking into the ocean by the turn of the century, forcing the ROC to address climate change effects. Natural resources remain limited, consisting of small reserves of coal, natural gas, limestone, marble, asbestos, and arable land.



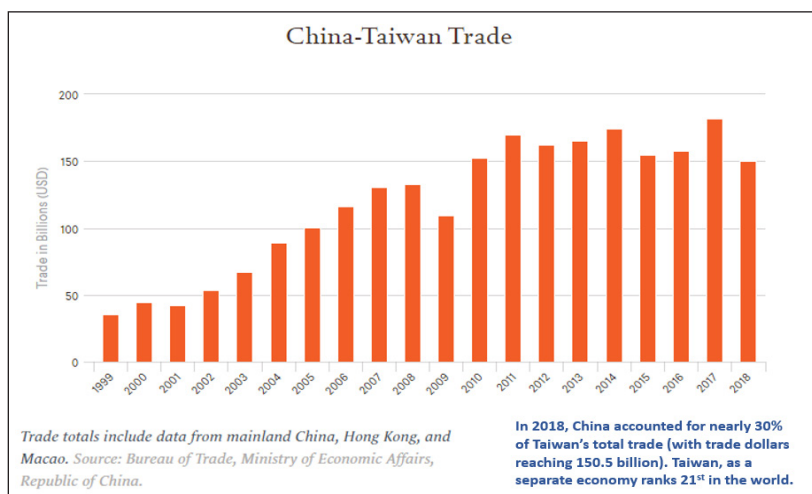
CHINESE EXPLOITATION

DIPLOMATIC ISOLATION

China will leverage UN non-recognition of Taiwan and economic pressure to force other countries to support its Taiwan policy. In 2035, the UN will still not recognize Taiwan and most countries will follow suit. Accepting “One China” will continue to be the most important choice for any country hoping to improve relations and/or increase trade with China. The PRC will continue to leverage the international system to keep Taiwan diplomatically isolated, while undermining that same system from within to replace it or establish an alternate system more complementary to Chinese authoritarian ways, means, and interests. The US “One-China” policy and Taiwanese Relations Act will remain in force, keeping Taiwan caught in the middle.

ECONOMIC INFLUENCE

China will attempt to isolate Taiwan economically. By 2035, China’s direct economic influence over Taiwan will have decreased as Taiwan has diversified its trading partners and reduced China’s economic footprint. Multilaterally, China will continue to use the UN non-recognition of Taiwan and economic pressure as levers to force other countries to openly or tacitly support its Taiwan policy. Bilaterally, China will offer Taiwan competitive funding and trade deals to minimize the access and influence of the US and its partners as well as further attempts of academic brain drain by enticing Taiwan’s exceptional student base with lucrative job offers and benefits.



LEVERAGING IDENTITY POLITICS

China will promote ethnic Chinese identity and pro-China movements. As Taiwanese identity steadily replaces Chinese identity, China will target the portion of the population still identifying in part as Chinese, and especially those positioned on the pro-unification side, to try to reignite Chinese solidarity across the strait. China will also attempt to pressure Taiwan’s ruling and opposition parties to create influence with corporate leaders, within the media, and among the populace. Additionally, pro-unification Taiwanese merchants will retain control of media outlets and use them to advance Chinese messaging.

IMPLICATIONS

China’s aggressive actions in other Chinese territories will generate pockets of anti-China sentiment within Taiwanese society and increase opportunities for US influence. Taiwan will continually battle persistent competing narratives targeting Taiwanese factionalization, and at some point, the Taiwanese will enact an independence strategy. This will involve using the US to increase military strength and burgeoning economic partnerships developed as Taiwan pulls more and more away from Chinese interdependence. As Taiwan continues to embrace democracy, the relationship between the US and Taiwan will grow stronger, and further challenge Sino-US relations. However, China will be unlikely to engage in conflict over Taiwan because of the high diplomatic, political, and blood costs without full Taiwanese consent.

MILITARY MISMATCH AND CIVIL-MILITARY DIVIDE

China will leverage painful history and martial law brutality to undermine military efforts. China will remain unlikely to take Taiwan militarily unless its hand is forced, but will continue to leverage fear of military overmatch and the Taiwanese civil-military divide to its advantage.

The PRC will continue to transmit threats of military intervention through a variety of media in contrast with official PRC messaging, which will emphasize mutual kinship and unity. China will also try to hamper Taiwanese military credibility with historic narratives of the Kuomintang’s (KMT) brutal martial law that lasted from 1949 to 1987. In addition, until the Taiwanese military increases the pay and professionalizes its military as a career of choice, its recruiting efforts will continue to suffer.

GROUND FORCES			
	China		Taiwan
	Total	Eastern & Southern Theaters	Total
Total Ground Force Personnel	1,020,000	408,000	140,000
Group Armies	13	5	3
Combined Arms Brigades	78	30	NA
Mechanized Infantry Brigades			3
Motorized Infantry Brigades	Transitioning to Combined Arms Brigades (see above)		6
Armor Brigades			4
Air Assault/Army Aviation Brigades	15	5	4
Artillery Brigades	15	5	3
Airborne Brigades	6	6	0
Marine Brigades	6	4	2
Tanks	5,800	UNKNOWN	800
Artillery Pieces	8,000	UNKNOWN	1,000
NAVAL FORCES			
	China		Taiwan
	Total	Eastern & Southern Theaters	Total
Aircraft Carriers	1	0	0
Destroyers	33	23	4
Frigates	54	43	22
Corvettes	42	33	0
Tank Landing Ships / Amphibious Transport Dock	37	35	14
Medium Landing Ships	22	16	0
Diesel Attack Submarines	50	34	2
Nuclear Attack Submarines	6	2	0
Ballistic Missile Submarines	4	4	0
Coastal Patrol (Missile)	86	68	44
Coast Guard Ships	248	NA	23
AIR FORCES			
	China		Taiwan
	Total	Eastern & Southern Theaters	Total
Fighters	1,500	600	350
Bombers/Attack	450	250	0
Transport	450	30	30
Special Mission Aircraft	150	90	30

Source: Annual Report to Congress: Military and Security Developments Involving the People's Republic of China 2019

Taiwan Strait Military Balance, 2019*

*By 2035, the ROC military will not increase much in size, but will improve technology and readiness significantly.



Case study Turkey



2035 OVERVIEW

POLITICAL

Self-Affirming Autocracy

Turkey will become increasingly authoritarian under the rule of Erdoğan and his AKP through 2035, with persecution of political opposition and control of media. Erdoğan will have long completed his centralization of power in the presidency. Turkish law will allow him to keep the office indefinitely and then to select his own replacement. The longer that Erdoğan remains in power, the more he will focus on nationalism and retaining power. Pro-Islam policies influenced by Erdoğan's ties to the Muslim Brotherhood will strengthen Islamist movements, contributing to the decline of the Kemalist secular republic and the rise of a second republic. However, Turkey will be split politically nearly 50/50 between the secular and religious/Islamic. Internationally, Turkey will remain a member of NATO but will still not be a member of the EU. With China's continued backing, Turkey may be a full member of the Shanghai Cooperation Organization (SCO).

MILITARY

Subservient to Erdoğan, Reliant on Foreign Technology

By 2035 the military will have been firmly under the control of the Erdoğan regime for over a decade. This will include appointment authority of all senior officers and presidential control over not just the armed forces, but also over the Jandarme and the Turkish National Police. Turkey will still be a member of NATO, but its role will be minimized as a result of fallout from purchases of sophisticated military equipment from NATO adversaries. Turkey's military focus will be increasingly internal. Despite Turkey's attempts to grow its defense industry into a developer, producer, and exporter, it will still be reliant on foreign arms sales. The regime will pursue arms deals with Russia and China as much for leverage (by all three countries) with the US, NATO, and EU as for the actual arms themselves. Turkey will continue to engage in this activity to demonstrate its independence from NATO and the US.

ECONOMIC

Foreign Debt-Driven Economy

Turkey will remain a fragile, indebted, import-dominant, market and developing economy in 2035. Inflation, currency depreciation will continue to weaken the economy. Erdoğan's economic strategy of debt-driven growth will have put Turkey's economy at the mercy of economic powerhouses. In an effort to diversify financing, Erdoğan will issue yuan-denominated bonds, and by 2035 China will own large portions of Turkey's debt. Economic contraction is possible if the debt burden becomes unsustainable. Turkey is even more likely to continue hosting illicit finance networks for terror, weapons/nuclear proliferation, and sanctions evasion for additional income as well as to ensure the Erdoğan regime's access, influence, and economic ties outside of Great Power competition. Turkey will play an important energy role between Asia and Europe, with more than eight oil and natural gas pipelines passing through Turkey, and electrical transmission networks linked to the Levant and MENA.

SOCIAL

Cult of Atatürk v. Cult of Erdoğan –Turkish Nationalism and Minorities

Many of the 3.1m Syrian refugees and asylum-seekers Turkey hosted in 2016 will remain in Turkey through 2035, and will be a minority voting bloc with power rivaling the Kurds. Erdoğan will continue to variously court the Kurdish vote and demonize Kurdish insurgents to gain domestic support. This will become more important as the Kurdish population increases through 2035 and Kurdish autonomy movements grow throughout "greater Kurdistan." Because Chinese Uighurs have linguistic, religious and cultural ties to Turkey, a significant number will relocate to Turkey to escape Chinese oppression. This kinship will fuel criticism of Chinese actions in Xinjian, which will stir contention between China and Turkey. Islamist groups will continue to be a growing political force that the

Erdoğan regime will cultivate with its turn away from secularism, influenced by Erdoğan's ties to the Muslim Brotherhood. Turkey will still be polarized along secular and religious/Islamic lines, both socially and politically.



Atatürk



Erdoğan

INFRASTRUCTURE

Energy Transportation Hub

In 2035 there will be more than eight oil and natural gas pipelines passing through Turkey and electrical transmission networks linked to the Levant and MENA. By 2035 Turkey will be on its way to becoming a transportation hub connecting Asia and Europe by increasing its railways 2.5X through China's One Belt One Road (OBOR) initiative as it has been a major railway development partner of Turkey since 2005. China will also expand its investments into Turkish seaports as a sea link in the new Silk Road. This increased transportation connectivity will boost Turkey's regional economic power.

INFORMATION

Decreasing Freedom & Increasing Government Access & Control

Erdoğan will continue to use Kemalist symbols when advantageous, but will seek to establish his own 'cult of Erdoğan' to further bolster his role as president into the future and replace secular Kemalism with a second republic. The regime will continue to tighten government control over media and the internet. The regime will routinely monitor and censor content and shut down social media and various information sites during political crises. Journalists and citizens will continue to be jailed for content determined to be against the regime. Violence against journalists will be common. Huawei (or its

Chinese successor(s)) will remain the largest foreign telecom and information technology company in Turkey, and will control more than half of Turkcell's 5G network. 5G, or possibly a successor, will cover virtually all of Turkey, allowing near-instantaneous transactions and transfer of data.

PHYSICAL ENVIRONMENT

Crossroads of Continents

Turkey has always been strategically important geographically as the land bridge between Europe, Asia, and the Middle East as well as the maritime gateway to the Caucasus and Central Asia (Black Sea). Turkey is an important part of the new Silk Road, comprising a major land connector between China and Europe through China's OBOR initiative.

CHINESE EXPLOITATION

"STEAL TO LEAP AHEAD"

China is renowned for industrial espionage, technology theft, and technology cloning. The latest conduit for this Chinese specialty is 5G information networks, which Chinese state-owned enterprises (SOEs) such as Huawei are pioneering around the globe and will have entrenched in Turkey by 2035. Huawei (or its Chinese successor(s)) will remain the largest foreign telecom and information technology company in Turkey, and will control more than half of Turkcell's 5G network. Turkey's information infrastructure will be accessible to Chinese monitoring, data and theft and manipulation, and network disruption.

UIGHUR QUID PRO QUO

Turkey will invest in Xinjiang province as part of China's attempts to placate Uighurs through economic and infrastructure development. Additionally, Turkey will work with China to combat the East Turkistan Islamic Movement (ETIM), a Uighur separatist group. Erdoğan will increasingly gain credibility domestically and within the Muslim world, as well as gain concessions from China, making him further beholden to China.

HOW TO BUY FRIENDS AND INFLUENCE PEOPLE: CHINESE ECONOMIC COLONIALISM OF THE ONE BELT ONE ROAD INITIATIVE

China will be a major investor and developer in the transportation and energy sectors of the Turkish economy through the One Belt One Road Initiative (OBOR). Turkey will expand its railways to become a transportation hub connecting Asia and Europe, with China filling Turkey's funding gap. Adding three additional Turkish seaports to Istanbul's Chinese majority-owned Kumpot will augment Greek ports in which the Chinese have heavily invested as part of the Maritime Silk Road. Chinese investment in gas and oil pipelines, as well as electricity transmission networks, will inject China into the energy power equation between Russia and the EU, providing desired leverage to China with both.

Map of Turkish Railways



Source: Ministry of Transport, Maritime Affairs and Communication

PLAYING ALL SIDES

Turkey will pursue arms deals with Russia and China as much for leverage (by all three countries) with the US, NATO, and EU as for the actual arms themselves. Because of the threat of infiltration or theft of US military technology, many deals with Russia and China will not be completed. Involvement in supplying advanced arms to Turkey, especially those restricted by the West and more specifically by the US, will allow China to insert a wedge between Turkey and its fellow NATO members, and potential access to US military technology.

IMPLICATIONS

Even though Turkey stands to gain considerable income through BRI transportation infrastructure projects, it will become increasingly subject to Chinese influence and pressures due to its owed debt—potentially at the expense of US interests. Further, Turkish arms deals with China and Russia place US and NATO military technology at risk of theft and subsequently potential defeat, due to Chinese cyber espionage and technology cloning capabilities. As a NATO member, even Turkey's consideration of making arms deals with potential competitors of NATO and the US weakens trust within the alliance and the US-Turkey relationship. Finally, Turkish reliance on China's Huawei will create multiple means for Chinese intelligence services to gain access to anyone and anything in the Turkish network, including US entities.

Appendix C: Methodology

Research Problem

During competition, the US Army must understand how adversaries (e.g., China) leverage the OE to gain an advantage on the US.

Research Question

In 2035, how will China leverage the strategic environment to gain competitive advantage?

- What conditions will likely shape the strategic environment in 2035?
- Of the conditions identified, which are conducive to exploitation by China?
- Based on Chinese strategy, *how* and *where* might it exploit the identified conditions in 2035?
- What are the implications of the predicted Chinese exploitation for the US Army?

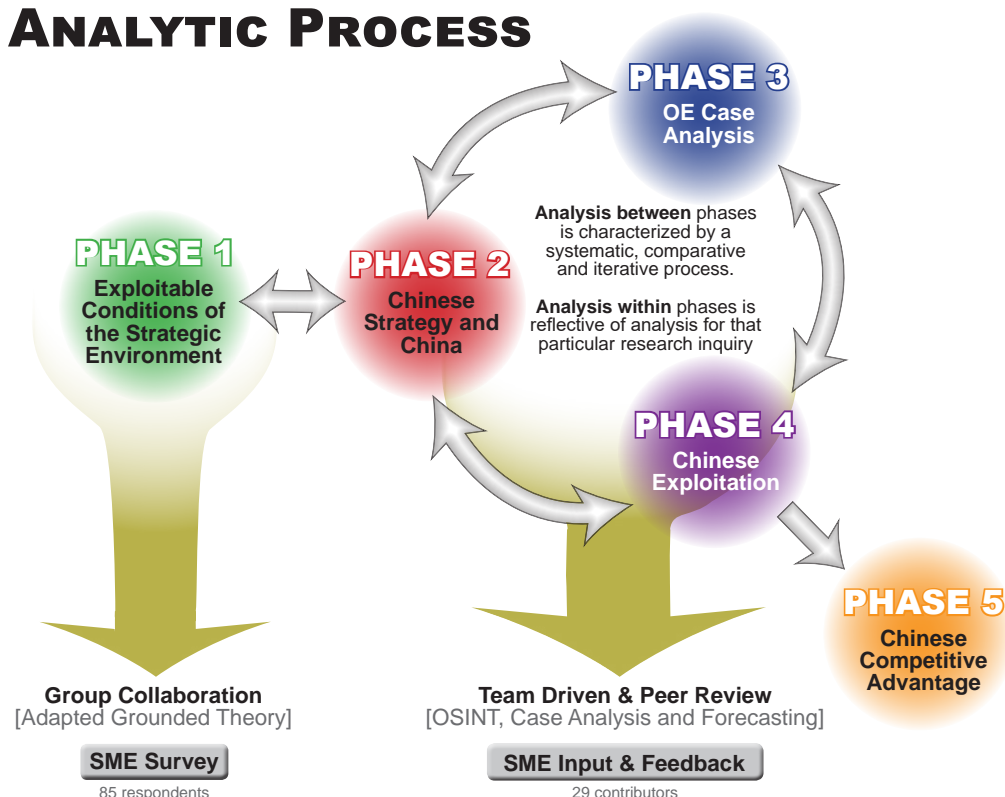
Research Process

To answer these questions, the study was conducted in five phases:

- Phase 1:* Identify and describe the most exploitable strategic conditions of 2035
- Phase 2:* Outline how China operates as it relates to its strategic interests
- Phase 3:* Conduct OE case analyses and determine how China leverages exploitable conditions
- Phase 4:* Based on case analyses, determine China's preferred conditions and methods of exploitation.
- Phase 5:* Forecast how China may gain a competitive advantage against the US

Each of the phases involved systematic research and analysis procedures. Analysis was strengthened by leveraging expertise from the US Intelligence Community, the Department of Defense and Department of State communities, Academic institutions, and think tanks that specialize in research relevant to this study. Case analysis was used to scrutinize Chinese strategy in light of the 2035 strategic environment and in accordance with specific OEs. OE cases were selected based on priorities of US combatant commands and Chinese interests as stated in official documents. The OEs selected are: Ecuador (USSOUTHCOM), Egypt (USCENTCOM), Nigeria (USAFRICOM), Taiwan (USINDOPACOM), and Turkey (USEUCOM). This approach was designed to understand how China may influence and ultimately gain a strategic advantage against its major competitors—most importantly the United States.

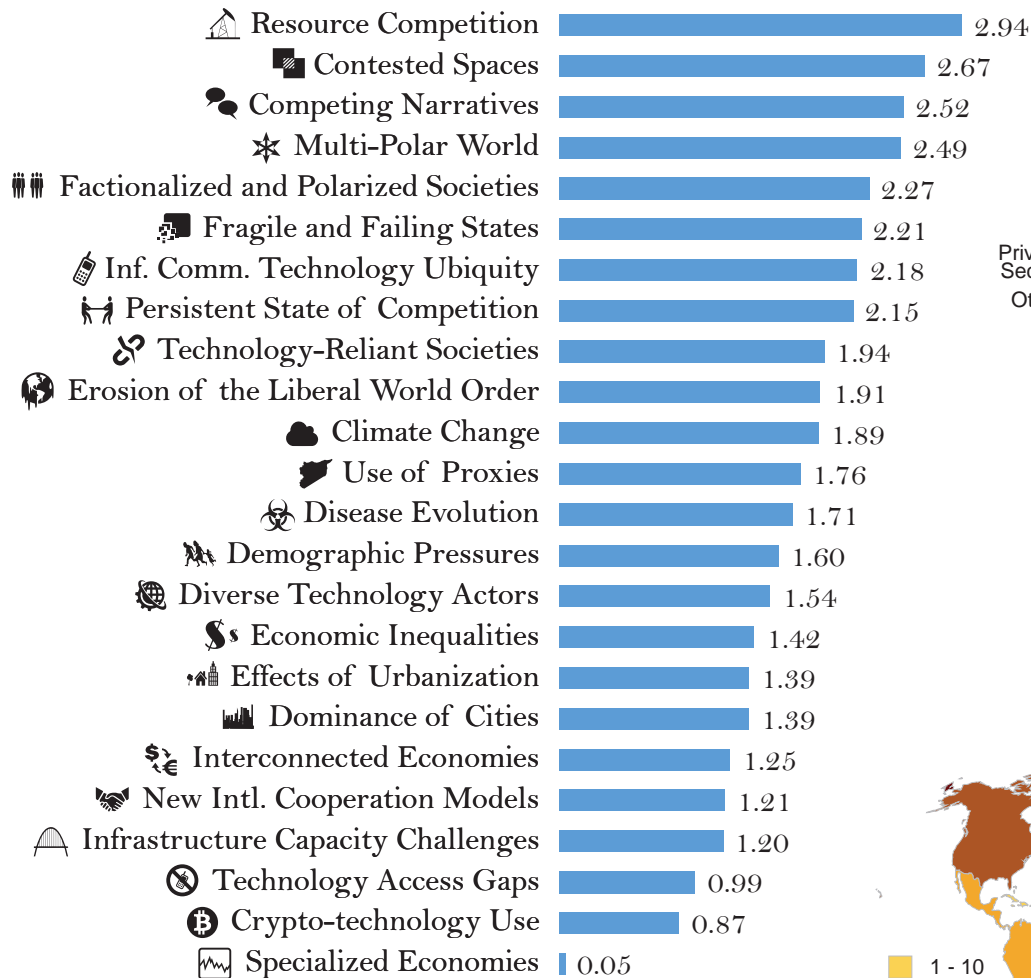
ANALYTIC PROCESS



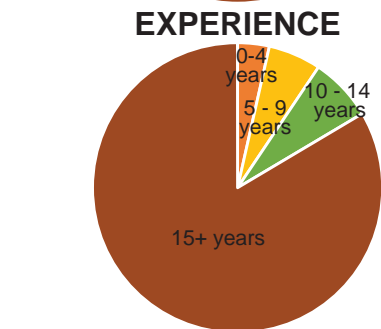
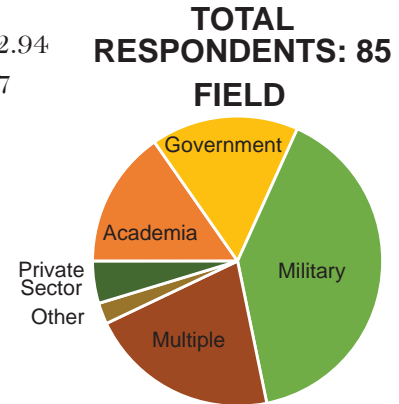
Appendix D: Survey Results

Conditions of the Strategic Environment to 2035

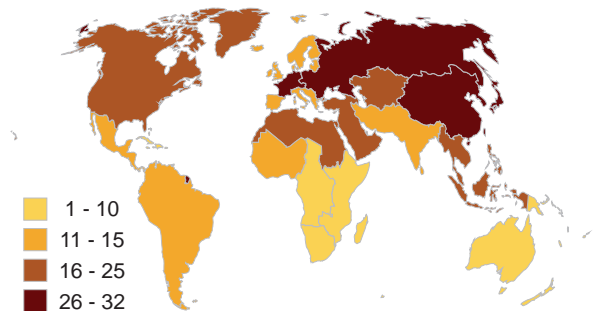
COMPOSITE SCORES OF PRIORITY LEVEL AND TOP 5 CONDITIONS



RESPONDENT DEMOGRAPHICS



REGIONAL EXPERTISE



ADDITIONAL CONDITIONS

Of the 85 respondents, 44 suggested between 1 and 5 additional conditions that they felt may have been missed in the original analysis. Common themes included:

- Over-reliance on artificial intelligence (AI), its displacement of civilian jobs, and the role it will play in changing military strengths (9)
- Domestic polarization in the US that challenges an enduring democracy and triggers a constitutional crisis (7)
- Development of new weapons of mass destruction that will change the power non-state actors can wield (6)
- An increase in cyberspace vulnerabilities (5)
- A deterioration of domestic economic management (5)
- Increased competition in, and the weaponization of space (4)
- A decline in the capabilities of the population due to a shortage of skilled labor (3)

There were also mentions of themes such as misleading media normalization, increased sensor density affecting freedom of movement, and the rise of non-kinetic warfare.

The number in parentheses indicates the number of respondents who suggested a condition similar to the theme.

NOTES:

Respondents were asked to assign a level of priority (None, Very Low, Low, Medium, High, or Very High) to each of the 24 conditions and subsequently to assign a rank of 1 to 5 to the five conditions that he or she believed would have the most impact on the 2030-2035 strategic environment. The priority responses were then weighted (None=-3, Very Low=-2, Low=-1, Medium=1, High=2, Very High=3) and added to the inversely weighted top five response (each rank of 1 is weighted 5, each rank of 5 is weighted 1) to arrive at a composite score with a range of -3 (priority "None" with no top 5 rank) to 8 (priority "Very High" with a rank of "1"). The composite scores shown are means of the scores from all the respondents.

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