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# THE FUTURE OF GREAT POWER COMPETITION

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### Introduction

The dominant geostrategic framework for international relations today is one of a great power competition between three rivalrous, globally ascendant states: the United States, Russia, and China. After more than two decades of mainly cooperation and collaboration, these countries had drifted into de facto rivalrous competition by the end of the 2000s (Campbell and Ratner, 2018; Stent, 2019). By the middle of the 2010s, their undeclared but obvious rivalry had intensified (Stent, 2019; Doshi, 2021). Fully acknowledged great power competition arrived in late 2017 when the United States published its National Security Strategy and declared a formal end to the 25-year era of United States-led globalization and active American democratization initiatives (Campbell and Sullivan, 2019; Lynch, 2020).

Previous chapters have considered the future of great power competition for an array of global actors: great powers, middle powers, small powers, geographic entities and non-state actors. This chapter will focus on the vital interactions of the three contemporary great powers. How did their relative power evolve? Where will they compete and how will this impact geostrategic norms, institutions, and inter-state alignments? Finally, will their competition spark direct great-power armed conflict soon?

Predicting the future always is a fraught endeavor. It is an increasingly difficult task if one defines the future in terms of decades or generations. A judicious consideration of relevant history can help one understand the patterns and probabilities for the trajectory of today's multi-state, great power competition. As a result, this chapter will analyze the future of contemporary great power competition for the remainder of the 2020s. It will do so with frequent explicit reference to historical patterns—touch points—associated with past multi-state great power competitions during the nation-state period that began in 1648 with the Treaty of Westphalia.

\* The assessments in this chapter are the product of the author's research and analysis and do not necessarily represent the positions of the National Defense University, the United States Department of Defense, or the United States Government.

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The chapter will begin with the important features of this evolving era of multi-state great power competition and define why the distribution of geostrategic power in that system is critical to analysis of the way forward. Then, the chapter will address the salient features of modern great power strategic aims and the most likely trajectory of their relative power attributes for the remainder of the decade. It will next evaluate the prospects for changes in great power identities before 2030 based upon forecast relative power changes. The chapter will conclude with an assessment of the prospects for near-term direct great power war.

### The Structure of Competition among Contemporary Great Powers

Great power competition describes the dominant feature of the geostrategic environment. It informs strategic options but is not policy prescriptive (Walt, 1998; Lynch, 2021; Wyne, 2022). Throughout history, great powers display three conspicuous attributes. A great power has *unusual capabilities* in comparison with other states. Then it uses these to pursue broad and sustained policy interests *beyond its immediate neighborhood*. Thus, it is *perceived by other states* to be powerful, have influence, and is treated accordingly. Today the United States, China, and Russia fit the great power description. However, this triangular great power structure is not durable (Waltz, 1979). One of these great powers could decline precipitously and fall from status, thereby altering the structure of global power distribution from three great powers to two or even one. Alternatively, another state might amalgamate power capabilities of sufficient quantity and quality to cross the threshold and become a great power.

The number and arrangement of great powers in the international system conditions the strategic environment and frames the policy choices made by these powerful rivals seeking to maximize individual wealth, influence, and security in conditions of uncertainty and anarchy (Waltz, 1979). Less powerful states retain agency to seek wealth, influence, and security but within parameters defined by the interaction of the great powers (Mearsheimer, 2001).

Eras featuring three or more great power states—multi-polar eras—have been the most common since the dawn of the modern state era in 1648. But their dynamics are unfamiliar to modern statesman. Multi-state great power competition is conducted over decades and centuries, not years. Spain, France, Great Britain, the Netherlands, and the Ottoman Empire competed as great powers across multiple continents from the late 1500s into the early 1700s. Spain, France, and Great Britain then continued that competition over American colonies for another century and a half. Russia, Austria-Hungary, and the Ottoman Empire alternatively jostled and clashed from the 1600s to the late 1800s across Europe, Asia Minor, and North Africa. Russia, Great Britain, and the Ottoman Empire engaged for more than a century in a “Great Game” located in Asia and the Middle East. Imperial Germany, France, Great Britain, Russia, the Ottoman Empire, Japan, and the United States were rivalrous great powers from the late 1880s to the end of World War II (Gilpin, 1981; Kennedy, 1987).

Three-quarters of great power transitions since 1500 have culminated with, or involved during them, a highly destructive period of direct great power war (Lacey, 2016; Allison, 2017; Lynch, 2020). War between great powers during times of relative transition is not inevitable, but it is a persistent threat. Great powers may channel or expend their worst animus in competitive activities, short of supremely destructive direct armed conflict. Military competition among great powers often includes shifting military alliances, arms races, proxy wars, and irregular martial activities (Levy, 1985; Mearsheimer, 2001; Hoffman and Orner, 2021). Great powers also constantly joust for relative advantage in four additional categories of inter-state competition and contest: the *politico-diplomatic*, *economic*, *ideological*, and

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Table 24.1 A framework for assessing the aspects/categories of competition

<i>Competitive aspect/category</i>	<i>Main competitive elements</i>
Political and diplomatic	Levels of influence in multi-lateral institutions, key posts held that control multi-lateral institutions, number and strength of political alliances.
Ideological	Values and appeal of political systems.
Informational	The manner and degree of transnational communications: open and transparent vs. closed and restrictive. Extent of denigration of “the other” in mass communications. Ability to manage internal messages and project external messages.
Military	Size, posture, professionalism, and technological edge of armed forces. Cohesion and capacity of military alliances.
Economic	Size, technological breadth, diversity, and resources based on the national economy. The innovation ecosystem of a national economy, including its access to and management of financial capital.

Source: Lynch (2020).

*informational* (see Table 24.1). These categories align with and extend the row titled “Mechanisms” in Table 1.2.

These major categories are consistent throughout history, but their main competitive elements are not static. These evolve over time and update in accordance with the dynamic aspects of evolving technology, political ideas, and governing structures.

Today’s main actors—China, Russia, and the United States—seek relative advantage and opportunity in each of these five competitive categories of Table 24.1. To understand the future of great power competition over the coming decade, one must evaluate the most likely protagonist trajectory for relative power and influence in these competitive categories.

**Major Actors and Mechanisms: Relative Great Power Transition Arcs and Implications for Future Competition**

Our modern era of multi-state great power rivalry is just entering a second decade. History informs that it should be expected to ebb and flow for at least several more decades (Gilpin, 1981; Kennedy, 1987). This section will address how great power competitive mechanisms should be expected to evolve given the relevant aspects of multi-state, great-power, geostrategic history.

*The United States: Relative Power Trajectory and Competitive Prospects*

The United States remains relatively strong in the military hard power and most of the soft power attributes necessary to influence by attraction or by coercion the growth of like-minded global partnerships and an ascendant role in the maintenance of international norms of behavior. Its military forces are unmatched in global power projection capacity and likely to remain so for at least the rest of the decade (Lynch, 2020). The relative size of the US economy and its manufacturing base is in decline compared with China. However, it appears to be recovering from the COVID-19 shock better than most of the developed world. American real GDP growth was 2.5% in 2023 which was better than expectations and beat

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the global average (Mutikani, 2024). Washington also has many other durable economic advantages.

Global American financial dominance remains a critical power advantage and is likely to endure despite increasing international pressure from China to end the dollar's role as the main currency of international transaction (Earle, 2023). America's innovation dynamism remains very robust, even in comparison to China (Chaing, 2022; Weinstein, 2022; Bankoff, 2022). Its demographic profile and immigration policies are more conducive to long-term economic adaptation and expansion than either of its two rivals. (Bankoff, 2022)

Core American ideological messages featuring freedom, openness, transparency, and universal human rights resonate very well in many parts of the world, providing America with an ability to attract other states to act favorably toward American objectives and interests. (Lynch, 2020) However, American political cohesion has been under duress from domestic polarization, catalyzed in part by rival great power multi-media interference. (Watts, 2019) America's longstanding global leadership is challenged by rival narrative projections that paint Washington as directly responsible for regional instability and as the primary cause of the uneven distribution of global wealth and power. (Pennington et al., 2022) This will continue throughout the 2020s. America's challenges are offset by Chinese and Russian limitations and liabilities. Neither Russia or China is likely to supplant the reach of American military and economic power or the generally positive resonance and influence of American values and institutions during this decade. (Beckley, 2018)

### *China: Relative Power Trajectory and Competitive Prospects*

China's power bases—its tools for international influence through attraction or coercion—have been skewed toward the economic but with clear potential to develop more broadly. China's trade and infrastructure investment prowess has made it a major force in the economic competitive space. It has declared long-term plans to leverage economic advantage for greater military, political, informational, and ideological capability—a military-civil fusion strategy. (Kanai and Laskai, 2021)

China's current power factors do not present an urgent military threat regionally or globally. But Beijing's determined focus on military development increasingly threatens US allies and partners in the Indo-Pacific and makes American military intervention on behalf of strategic partners there more costly over the coming decade. (Heginbotham, et al., 2015) China seeks the elimination of American presence in the Indo-Pacific as that stands as an obstacle to its ambition to be the dominant power in the region. Thus, Beijing works to erode US power and influence in the region while seeking to avoid a direct military confrontation. (IISS, 2019; Lynch, 2020). China's People's Liberation Army (PLA) can deny US naval and air forces uncontested access to areas near the Chinese coast, and it can hold major US air and naval weapons platforms at risk military in East Asia and the Western Pacific. (Heginbotham et al., 2015) However, China will be hard pressed to project power outside the second island chain during this decade. (Wuthnow and Fravel, 2022). China is rapidly expanding its strategic missile force and its nuclear weapons arsenal in a manner that will create a formidable deterrent posture if sustained into the 2030s. (Bugos and Klare, 2023)

China's historically rapid domestic economic growth slowed between 2018 and 2022 and is likely to remain constrained into the future. After decades of GDP growth at 7% or greater, China's ascent slowed to 2.2% in 2020 and 3% in 2022. (Douglas, 2022) It was forecast to be no better than 4.3% in 2023 and despite suspect Chinese claims that 2023 GDP growth

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exceeded 5%, its growth is expected to remain sluggish for the remainder of the decade when compared to recent Chinese norms... (World Bank, 2023) Part of China's economic slow-down came from almost three years of self-imposed "Zero COVID-19" domestic lockdowns, but Beijing also has to confront a significantly altered global economic environment from the one it enjoyed before 2018.

The United States and China commenced a "trade war" two years before COVID-19. Competitive trade tensions show no signs of abating. (Huang, 2020) China also faces a new challenge from American-led, Western export constraints on key technologies like the semiconductor, a vital component for technological innovation and economic development in the highest value areas of modern economies like 5G and 6G communications, big data computing, artificial intelligence (AI), robotics, and autonomous machining. (Miller, 2022) China somehow must increase domestic consumption for indigenous goods which are now too expensive for many traditional export markets while at the same time replacing vital access to Western high technology inventions and processes that Beijing relied upon for economic expansion during its impressive three-decade ascent. These feats will be difficult to manage during a painful economic rebalance that is certain to constrain Chinese GDP growth to at or below 3% for years to come. (Schneider, 2021; Pettis, 2023)

The impressive arc of Chinese international economic ascent also flattened in the early 2020s. Its robust and well-received international infrastructure programs, mostly as part of Beijing's so-called Belt and Road Initiative (BRI), came under stress. Many BRI projects have not produced the envisioned economic returns even though some have generated coercive political-diplomatic gains. (Lu, 2023) In 2022, the Group of Seven (G7) industrialized nations introduced a competitor initiative to China's BRI: the Partnership for Global Infrastructure and Investment (PGII). (Moses et al., 2022) American-led competition will slow and slim down a Chinese international investment juggernaut and test the attractiveness of its state-led equity and development model.

China's projected economic power advantages are unlikely to fully eclipse those of the United States in the coming decade and Chinese economic power may not be sustainable in the out-years. (Brands and Beckley, 2022) Beijing must find a way to redress looming weaknesses certain to constrain economic growth, including a fast-aging population, an educational and intellectual culture that constrains innovation, and an undersized presence in global financial markets that limits the revenue potential and influence of its financial services. (World Bank, 2023; Ji, 2023) China's efforts to establish the renminbi as an increasingly dominant instrument of international financial exchange will be a critical initiative to watch and will be addressed in a subsequent section.

China's diplomatic power tools consistently underperform. Its coercive use of its economic leverage in abrupt, brusque sanctions and embargos of trading partners including Australia, New Zealand, and Lithuania set back its diplomacy and drove these partners away and toward deeper economic and security arrangements with the United States. (Huang, 2022; Taffer and Wallsh, 2023)

China also displays stubborn deficiencies in its ideological, cultural, and communications power posture and influence potential. It has no real multilateral political or military alliances. Its national narrative focuses on state control and social order over individual liberties in a manner that resonates poorly outside of authoritarian circles despite Beijing's intense global messaging campaign. (Lynch, 2020) China's reflexively defensive posture and relatively limited role in addressing the coronavirus pandemic generated mistrust and ill-will in many nations. (Gupta, 2022)

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China's power trajectory and mechanisms for future competition indicate that it will remain the biggest rival to the United States but without surpassing America anytime soon. However, Beijing seems increasingly likely to suborn Russia as a junior partner in its strategic aims as Moscow reaps the bitter fruit of Putin's poor decision-making in Ukraine. (Lynch, 2022)

*Russia: Relative Power Trajectory and Competitive Prospects*

Prior to its 2022 invasion of Ukraine, Russia sought to manage its relationship with the USA, the European Union (EU), and the North Atlantic Treaty Organization (NATO) to deter “supposed” hostile action by weakening the cohesion of these alliances. It also had been developing deeper relationships with China, the Chinese-led Shanghai Cooperation Organization (SCO), and the international Brazil, Russia, India, China, and South Africa (BRICS) consortium countries to blemish US influence abroad. (Salzman, 2019)

Pre-2022, Russia's relative power capabilities were most heavily concentrated in its military and its information manipulation and influence activities. Its military tools ranged from a formidable nuclear weapons arsenal to significant military and armed mercenary power projection capabilities burnished over several years in distant, limited, gray-zone, armed actions. (Lynch, 2020) Moscow's multi-media information operations had generated meaningful disruption against Western leaders, political processes, institutions, and organizations. (Watts, 2019; CFR, 2022) Vast oil and gas reserves combined with expanding global delivery networks and Moscow's participation in the Organization of Petroleum Exporting Countries – Plus (OPEC+) forum for managing global oil supplies provided Russia with its main point of economic prowess. Yet its economic, ideological, and political power have always been sub-standard for a durable global power.

Since the invasion of Ukraine, Russia has squandered a significant amount of power and accelerated an already evident relative power descent. Punitive Western financial sanctions and a dramatic decoupling of Europe and North America from Russian energy exports bit Moscow hard. Its GDP growth contracted by 3.5% in 2022 and another 3.3% in 2023 with poor future growth prospects. (The World Bank, 2023) Moscow's pariah status with Western states has pushed its economic future more heavily—and dramatically—into the orbit of China. (Guabev, 2023)

Russia's military has suffered staggering losses in Ukraine. British intelligence estimated about 220,000 Russian casualties, with up to a quarter of those dead, during the first year of its invasion. (The Economist, 2023) Russian military equipment losses were equally stark in the first year with more than 1,500 tanks, 2,400 variants of personnel carriers, and thousands of artillery pieces lost. The Russian defense budget will need years to replace what the military has lost or otherwise expended in Ukraine. (Pifer, 2022) Perhaps more importantly, the narrative of Russian martial prowess and acumen earned from a series of unconventional warfare actions during the 2010s was flipped as the world witnessed exceedingly poor performance in high-intensity, state-to-state combat. President Putin has somewhat masked this catastrophe by portraying durable Russian global military relevance in naval exercises off Japan, launches of intercontinental hypersonic cruise missiles, and with the sustained presence of Russian Wagner Group mercenaries in countries including Syria, Libya, South Sudan, Chad, and Mali. (Faulconbridge, 2023; Ehl, 2023)

Russian diplomacy also sustains the global reach and influence befitting a great power. Moscow's role as a Permanent Five (P5) member of the UN Security Council with veto

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power conveys its influence and resonates widely. The Russian Foreign Ministry retains a global voice and influence especially when blaming the United States and Western partners for the economic ills of lesser developed countries and Southern Group states. (Pennington et al., 2022)

Down but not out, Russia is most likely to remain a great power during this decade despite a steeper relative power descent than before 2022. At the same time, Moscow's desperate turn for a lifeline with Beijing increasingly will compromise Russia's independence and relative stature at the great power high table.

*India, not Europe: An Evolving Role in Great Power Competition*

Past eras of multistate great power competition often feature the ascent of a middle power into great power status. Great Britain joined France, Spain, and the Ottomans as an international great power in the early 1700s. The late 1800s witnessed the rise of the United States, Imperial Germany, and Imperial Japan from the ranks of the middle powers onto the high table of great powers. (Kennedy, 1987) In each of these cases and others, middle power ascent did not alter the global distribution of power in a structural manner, for the geostrategic framework remained multipolar. (Waltz, 1979; Gilpin, 1981) Newcomers effectively developed the key attributes of a great power by acquiring unique military and economic attributes, acting in a strategic fashion well beyond their own region of the world, and catching the attention of other states as a ubiquitous factor in geostrategic calculations and decision-making. (Gilpin, 1975; Lynch, 2020)

Many wonder whether Europe might soon rise as a great power in the emerging international order. Variants of this question have been asked for decades as post-World War II European integration flowed from the romantic vision of a Europe transcending conflict and forming an ever-closer union. But the crowning jewel of the European integration experiment—the EU, established by the 1992 Treaty in Maastricht and entering into force in 1993—has struggled to present a cohesive whole. From 1993 to 2022, the EU never cleaved together politically, militarily, or even economically to the degree necessary to meet the three-feature definition of a global great power. (Lynch, 2020) It has remained an important, but lesser-tier, player in the emerging new era of great power competition shaped by the USA, China, and Russia.

After the outbreak of the Russo-Ukrainian war in February 2022, some analysts observed changes in the EU, suggesting a deepening economic and political union with security and defense cooperation necessary to ascend as a great power. (Sullivan, 2022) For the first time ever, the EU purchased and provided €450 million worth of weapons and equipment to an active warzone in support of Ukraine, simultaneously encouraging member states to make extensive military contributions. It extended past efforts to create an EU defensive union that would run parallel to NATO without duplication, deploying a first-ever cyber division to counter attacks from Russia. The EU took uncharacteristically rapid collective action that banned all Russian-owned media and froze Russian bank assets. (Eder and Moyer, 2022) It also led member states through a painful but necessary rapid move away from European energy dependence on Russia. (Gili, 2022)

Important as these EU activities were to a cohesive European response against brazen Russian regional aggression, they do not portend any imminent future for the EU as a global great power. The EU lacks autonomous authority over member state security policies or military procurements. Thus, NATO's formal processes and organizations featuring advanced

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American military capabilities were the essential enablers of Europe's security response to Russian aggression. NATO remains an irreplaceable organization for harmonizing European security policies and activities against Russia and China (Bond and Scazzieri, 2022). This is even more the case today since the United Kingdom (UK) removed its significant strategic nuclear and conventional capabilities from the EU with its 2020 BREXIT departure even as it remained a NATO member. (Adamson, 2020)

AQ1 EU political and economic interactions with China also demonstrate that while it is a player at the high table of global commerce and finance, it cannot generate or enforce a cohesive strategic narrative on member states in a manner requisite for a global great power. In early 2023, EU President Ursula von der Leyen publicly announced a framework for “de-risking” European economic activities with China to limit the potential for Chinese economic coercion or security blackmail. (von der Leyen and Ursula, 2023) French President Macron then traveled to China with von der Leyen and a large commercial delegation announcing there that he viewed European strategic autonomy to necessitate that his nation and others avoid getting caught up in crises that “are not ours” (Sorgi, 2023). EU policy discontinuities were further highlighted by Germany as Prime Minister Scholtz announced support for the EU approach of “de-risking” even as his government delayed for several months the publication of a national strategy for China due to significant disagreement about whether major German investment would continue to flow to China, Berlin's largest trading partner. (Reuters, 2023; Rinke, 2023)

Unlike the EU, India comprises a cohesive sovereign entity with direct control over its military assets, political and economic processes, and strategic narrative. More than any other contemporary sovereign state, India has a growing economy, a nuclear capable military, and an international diplomatic presence. So, for the 2020s, India appears to be the country with the most latent potential to rise to the status of a great power. But New Delhi is not realistically poised to become a great power this decade. (Tellis, 2019)

India has a large population that recently bypassed China's as the largest in the world. It has the fifth largest economy and a steadily growing GDP along with an expanding presence on the international export and exchange markets. At the same time, India's domestic limitations constrain advancement in many manufacturing and financial sectors and its economy is heavily dependent on trade with China for many of its critical supply chains. Despite frequent Indian rhetoric about economic decoupling from China over time, the loss of Chinese supply chains and investments would harm India far more than it would impact China for the foreseeable future. (Verma, 2023)

India has a military that mainly focuses on its immediate regional antagonist, Pakistan, but with increasing attention to its great power rival, China. (Tellis, 2019) The Indian armed forces are growing toward a joint and strategic organization with intercontinental missiles and a deterrent nuclear force that includes land, air, and sea components. However, India is not likely to field a full strategic triad before the end of the decade if then. (Wright, 2022) India is a large and growing player in outer space with one of the top five satellite launch organizations in the world. Its posture in outer space is poised to grow exponentially in the coming decade on the back of surging demand for telecommunication services and because Western satellite services are abandoning Chinese launch facilities due to growing political risk. (Einhorn and Saxena, 2023)

Despite these favorable if somewhat mixed relative power factors, New Delhi does not aspire to project military power beyond its immediate region. (Tellis, 2019) Most security experts do not anticipate that India will have sufficient capabilities for military power



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projection beyond the Indian Ocean Region before the mid-2030s at the earliest. (Gatapolous, 2021) India is not a P5 member on the United Nations Security Council. However, it is an increasingly active leader of the Group of Twenty (G20), including a stint as its rotating president during 2023. India used this presidency to project itself as the “Voice of the Global South”, emphasizing the demands of poor countries for inclusive growth, climate finance, more representative multilateral institutions, and progress on sustainable development. (Baru, 2023)

India can position itself as an arbiter of great power competition in the Global South. New Delhi retains a historic relationship with Moscow so can present itself as a diplomatic counterweight to Russian denigration of liberal norms and democratic governance. India also might provide an alternative for developing states wishing to escape coercive Chinese economic and diplomatic overtures but wary of direct interaction with America and its partners. The United States increasingly views India as a potential bridge to the developing world and a democratic counterweight to China’s influence. India is postured to be an increasingly influential global diplomatic presence over the coming decade even though not yet a great power.

*The Future Structure of Great Power Competition and Relative Power  
Changes in the Current Three*

The United States, China, and Russia each face major internal structural, economic, and demographic challenges. The choices each state’s political leadership makes about how to address these domestic dynamics as well as their international challenges will determine the future power they will possess, and the future policy options they might pursue. Russia appears to be confronting these challenges first in the early 2020s. (Lynch, 2020)

Moscow’s disastrously misjudged military attack of Ukraine stoked the first proxy war of the new great power competitive era and put Russia’s fragile relative power factors under enormous duress, accelerating decline. (Gabuev, 2023; Lynch 2022) America and its NATO allies have been able to contest Russian norm-busting military aggression while avoiding a direct armed clash with Moscow. In classic proxy war fashion, the Alliance equipped and mentored a frontline but technically unallied state with a mix of inexpensive but effective autonomous drones, artillery, air defense, and cruise missiles that effectively denied most of Putin’s campaign objectives and exposed Russia as an amazingly incompetent military foe. (Duffy Toft and Monica, 2022).

The Russo-Ukraine war has also weakened Moscow’s strategic position in Eurasia as its aggression has spooked formerly neutral European nations Finland and Sweden into joining NATO. American global sanctions and diplomatic initiatives simultaneously have accelerated the already noteworthy ongoing decline of Russian economic status and global influence. (Gabuev, 2023)

Bipolar zero-sum certainties are not present in modern multistate great power competition. (Waltz, 1979; Lynch 2022) Putin’s misguided invasion of Ukraine and obvious wastage of already limited Russian military and economic power there did not inherently benefit America’s strategic interests, nor did it convey certain advantages to China. Instead, Beijing and Washington will compete for dominant influence over the role and relationship of Moscow in the ongoing decade. (Lynch, 2022)

For its part, China views the retention of Russia as a great power rival of the United States to be strategically advantageous. (Kusa, 2022) A chastened but intact Russia diverts at least

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some American economic attention and military resources away from the Indo-Pacific and toward the European theater. Moreover, Chinese delimited support for Russia as a declining but relevant great power allows Beijing to exact an increasingly heavy price for diplomatic friendship, turning Russia ever-more into a vassalized junior partner. For the cost of a March 2023 photo-opportunity in Moscow that made Vladimir Putin and Russia look less of a global pariah, Chinese President Xi Jinping exacted important Russian concessions. Reportedly, that March 2023 visit gained Chinese exclusive rights and prices on rare minerals and special commodities, the transfer of top Russian weapons technologies, formal Russian diplomatic support to Beijing in its territorial dispute claims in the Indo-Pacific Region, and Moscow's agreement to use the Chinese renminbi as the official currency in bilateral economic exchange and during all Russian energy transactions with the middle powers and small states of the less developed world. (The Economist, 2023) China can be expected to extract even more favorable terms and conditions from a vassalized Russia should Moscow's isolation from the West grow more all-encompassing. (CSIS, 2022)

The United States also wants a chastened but largely intact great power in Moscow. It cannot afford to clean up the mess of a collapsed Russia embroiled in civil war or overtaken by radicalized officials who might resort to using nuclear weapons or enabling their proliferation. (Lynch, 2022) It would prefer a form of Russian leadership capable of reasonable compromise in Ukraine, renunciation of force to intimidate bordering Eurasian states, retention of sufficient territorial control and governance to stabilize Russia proper while resisting Chinese encroachment or usurpation of key Russian power assets for use by Beijing. (Gabuev, 2023)

Washington must guard against significant relative power gains for a rival from the accelerating decline of another great power. (Lynch, 2022) It should be expected to seek benefit from Russian decline by finding mechanisms to reset bilateral relations with Moscow, most likely after new political leadership there, that helps reform Russian behavior and reveal points where Western isolation of Russia can be eased to provide Moscow with some options other than a growing fealty toward Beijing. As with past eras, both of Russia's contemporary great power rivals this decade will seek to gain maximum relative advantage from its decline without undoing Moscow's great power status or the multi-polar global distribution of power.

### **Competitive Arenas and Prospects of the Major Great Powers**

The main arenas of great power competition for the rest of the 2020s will involve certain territorial regions and multiple borderless activities like those involving space and cyberspace addressed in earlier chapters. Yet great power competition—especially within the Sino-American rivalrous dyad—is systemic as much as regional and functional. Systemic great power competition will reshape the structure of the international order. (Mazarr and McDonald, 2022)

Systemic competition is occurring along two vectors. Both contribute to the fragmentation of formerly universal organizations and institutions. The first vector features great powers assertively and simultaneously manipulating and contesting the rules and norms in standing international organizations, institutions, and activities. (Chhabra et al., 2022) Chapter 23 discussed the jousting between the United States and China in the international Human Rights Commission (HRC) over Beijing's aim to change the historical definition of human rights from an individual-focused one into an ultra-statist version. This is just one of an increasing number of instances where wrangling over foundational differences between rivalrous great power norms and ideals frustrates international consensus, neuters joint policy

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development and enforcement, and fragments once cohesive systemic global arrangements. (Jorgensen, 2020; Remler, 2020) Russia and especially China will continue efforts to co-opt standing institutions by enticing or coercing member states to support their misuse for nationalist agendas and to alter their fundamental underpinnings. (Schuman, 2021) The United States and its partners will continue to push back. The resulting tensions will erode viability and constrain effectiveness. This is a growing reality for agencies and forums within and affiliated to the United Nations (UN) and for free-standing global institutions like Interpol. (Fung and Lam, 2022; Hyde, 2023; Keith and Davies, 2023)

The second vector features the growth of alternative international governance regimes and networks that compete with traditional ones. Here, China is at the forefront. Over the past decade, Beijing launched the Global Security Initiative (GSI), the Global Development Initiative (GDI), the BRI, and others as alternatives to what it regards as US-dominated regimes. (Jaeger, 2022) GSI envisions an alternative, post-American, international security architecture and courts international participation. (Van Oudenaren, 2023) Although nominally supportive of the UN, China's GDI framework states that economic development is prerequisite to the enjoyment of human rights, positioning the nation state over the individual in a manner contrary to standing UN norms. It also links GDI with GSI. (Page, 2022) Announced in 2013, the BRI is China's massive global infrastructure development initiative, but it is so much more than this. It is Beijing's most important political and economic instrument enabling the internationalization of Chinese priorities and its long-term strategic interests. Beijing is leveraging the BRI's global reach to encourage more countries to join multilateral cooperation platforms originated or dominated by China, like BRICS, the SCO, and the Asian Infrastructure Investment Bank (AIIB). (Umbach, 2022) China also views BRICS as an emerging potential global political and trade framework to eventually supplant the World Trade Organization (WTO) and the G7 (Jaeger, 2022).

If China cannot recalibrate existing, American-supported, international political and security organization norms and procedures, then it will move onto these new organizations where its definitions and norms serve as the baseline. This is why the EU writes of China as a "systemic rival promoting alternative models of governance" and the United States refers to China as a "competitor with both the intent and, increasingly, the capability to reshape the international order" (European Commission, 2019; *National Security Strategy of the United States*, 2022; Jaeger, 2022). As with the first vector, systemic competition along this second will become increasingly prominent and will fragment the cohesion and relevance of long-standing global norms and ideals over the remainder of the decade.

Great power competition over the systemic features of a future international order will engage governance, security, and economic elements. Several of these elements have been addressed above. The rest of this section will focus on three major arenas where the great powers will compete vigorously around the globe for the remainder of this decade to establish both their preferred domain rules and norms in global economic interactions, to build-out alliances and partnerships that uphold these preferences, and to establish the level and degree of global communications and messaging. I will demonstrate that these three arenas also all involve an accelerating fragmentation of formerly globalized domains.

*Global Economic Rules, Norms, and Organizations*

Global economics integrate the dynamics of trade, finance, and infrastructure development. The post-World War II era featured all three systems built around American-preferred norms

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of global openness, freedom of access, private corporate enterprise, and the primacy of the American dollar. (Kindelberger, 1996; Wong, 2023) For more than 30 years, China has benefitted handsomely from these economic norms and institutions. Beijing values free-flowing trade and finance, but with a model that emphasizes a large state role in economic decision-making. (Lynch, 2020)

Beijing continues to be a supportive member in many of these foundational economic arrangements and organizations. (Ikenberry and Lim, 2017) But as its relative power has grown, China has rejected lower domestic barriers to overseas corporate ownership and has chafed at making its state-led economic decisions fully transparent. Beijing also has aggravated global trade and financial partners with a well-documented pattern of intellectual property theft and disregard for the sanctity of proprietary innovation. (Lewis, 2017)

Since the mid-2010s, China has been establishing parallel institutions and programs to compete with Western institutions in trade, international infrastructure development, and finance. China's BRI announced in 2013 and its AIIB begun in 2016 are just two examples of Chinese alternative economic institutions that the United States and some other Western states have not joined. (Seiwert, 2020) As of 2023, China brought over 140 states into its BRI framework. Notably, the United States and India do not participate in the BRI but many other states simultaneously participate in BRI programs, those from the legacy International Monetary Fund (IMF) and Asia Development Bank (ADB) where all three great powers are members, and in the G7 PGII where China and Russia are excluded. Likewise longstanding members of the World Bank and IMF where America holds sway have joined 120 participants in the Chinese-led, American-free AIIB, including Japan, India, and many European countries. The presence of these Chinese trade and financing alternatives foreshadows greater fragmentation of the global economic order in the near term and beyond.

China also has focused on extending the global reach and convertibility of its currency, the renminbi, as an alternative to the dollar. While Beijing has had success in attracting countries like Brazil to expand bilateral trade denominated in renminbi and coerced Russia into preferred use of the renminbi in both bilateral commercial transactions and in those with countries of the developed world, it has only begun the complex process of displacing the dollar's global privilege. (Earle, 2023) In 2022, China's yuan accounted only for 2.7% of global currency reserves while the dollar made up almost 60%: more than all other national currencies combined. That same year about half of global trade was denominated in dollars and a full 88% of international currency exchanges involved the dollar. (Wong, 2023) Starting from such a deep disadvantage, the Chinese effort at de-dollarization will evolve slowly and unevenly for at least the coming decade. (Earle, 2023)

In some ways, Chinese alternative commercial programs and financial arrangements have filled gaps in the coverage of legacy World Bank, IMF, and WTO arrangements. Multifaceted Chinese global economic expansion also is consistent with the pattern of past rising great powers. Great Britain and the United States for example used growing domestic wealth and status in a globalized effort to extend and expand access to global factors of production and markets for manufactured goods. (Gilpin, 1975; Kindelberger, 1996)

Like China, Russia prefers state-monopolized trade. It does not adhere to norms of freedom or openness in its general commercial activities. Prior to 2022, and despite an array of Western-imposed financial and trade sanctions levied against Russian organizations and individuals especially since 2014, Russia seemed to accept the basic elements of international trade and financial flows so long as they sustained President Putin and his oligarch constituency's financial interests. (Stent, 2019; Lynch, 2020) Extensive Western punitive financial

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and commercial sanctions following Russia's 2022 invasion of Ukraine changed that calculus fundamentally and pushed the Kremlin largely out of the American legacy global financial system. (Sonnefeld and Tien, 2023) Moscow began reorienting primary trade routes and economic exchanges into an accelerating alignment with Chinese preferences. Tight economic coupling between Moscow and Beijing will present a significant challenge for Washington, ultimately requiring it to consider less coercive economic approaches toward Moscow. (Lynch, 2022) To forestall its geostrategic distress from turning Moscow into an economic vassal of Beijing, America is almost certain to eventually offer Russia some alternative economic incentives for at least partial rapprochement.

Trade and financial disputes are surging as primary flashpoints between the three global powers. As Beijing moves to supplant Washington's preferred international rules, norms, and processes with a more state-centric model of economic activity, fissures in the international trade and finance order will widen. (Wong, 2019; Mazarr and McDonald, 2022) This fragmentation will not yet force middle or small powers to exclusively align with one framework or another. (Kausikan, 2023) At least for the next decade, Sino-American economic competition will feature divergent philosophies without hard boundaries. Lesser states will experience degrees of freedom in economic, political, and security alignment, at least for a while.

*Military Influence on Defense and Security Relationships*

Throughout modern history, great powers have forged military alliances and partnerships to expand strategic reach, to enhance deterrence of great power rivals and their proxies, and to extend power and influence by attraction. (Gilpin, 1981; Mearsheimer, 2001) In past multi-state eras, great powers frequently established security partnerships among themselves in bilateral or multilateral combinations and in competition with rival great powers. Historic great power security alliances are often fluid. Great Britain fought against France in iterative great power military alliances for two centuries with an interlude of military partnership against Russia during the 1850s Crimean war. Ultimately Great Britain allied with long-time rival France and other great powers, including "Great Game" strategic rival Russia, against Germany during the early twentieth century. (Kennedy, 1987; Lacey, 2016) Great power military and security alliances with lesser powers also can be fluid. They are important to great power competitiveness but most favorable to great power interests when tightly coupled in arrangements featuring interoperable military equipment and doctrine, integrated command and control protocols, and a political-military decision-making foundation that clearly specifies duties and obligations in the event of armed conflict. (Levy, 1985)

The United States has a comparative advantage in forging multinational defense and security alliances and partnerships. Washington has recognized this advantage and moved to deepen historical multilateral security alliances like NATO, to expand existing bilateral alliances into multilateral ones especially in the Indo-Pacific region, to extend military partnerships as more tightly coupled alliances, and to forge new military partnerships. (*National Security Strategy*, 2022) American-endorsed multi-lateral security partnership initiatives across the Indo-Pacific are noteworthy and include the multi-faceted Quad arrangement with Japan, Australia, and India, and the maritime security AUKUS partnership with Australia and the UK (Kutty and Basrur, 2021; Joint Leaders' Statement on AUKUS, 2021). Many states, especially across the Indo-Pacific region, appear keen to join American-led security partnerships. While they wish to continue beneficial economic exchange with China, they

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also desire a hedge against coercive Chinese influence targeting them or their regional interests. (Lynch, 2020; Kausikan, 2023)

China has some experience with bilateral military and security alliances but far less with multilateral ones. Beijing has longstanding bilateral security partnerships with North Korea and Pakistan. Both have a narrow, regional security focus and feature common military equipment and liaison interactions. China and Pakistan have recurring training exercises. (Lalwani, 2023). None of the three have joint combat experiences. From the early 2000s, China has conducted multilateral “Peace Mission Drills” with Russia and the Central Asian states sponsored by the Chinese-led SCO. These mainly have focused on suppressing a major insurgency or popular rebellion. (Weitz, 2021) Beijing has also conducted periodic joint naval exercises since 2023 with Russia and Iran. (The Moscow Times, 2023)

China’s most important security partnership is its bilateral one with fellow great power Russia. Not a full-fledged security alliance—for neither state has formally promised to defend the other in event of an attack—the Sino-Russian defense relationship has evolved significantly from its 1990s origins. Moscow originally exploited episodic Sino-Russian exercises to display weapons systems to potential People’s Liberation Army (PLA) buyers and to gain insights about evolving Chinese military capabilities. From 2012, Russia and China have conducted recurring naval exercises on at least an annual basis.

The Russo-Ukraine war has deepened this most important security relationship. Dramatic Russian military equipment losses and stiffening Western sanctions force Russia ever-more toward China to revive its armed forces. Inevitably, Russia must buy substantially more Chinese weaponry including China’s more advanced unmanned aerial vehicles and information technology systems. It also may become beholden to China’s shipbuilding capacity, space infrastructure, and to redress shortfalls in domestic technologies. China will become the partner using joint military drills to showcase its own advanced arms to Russian state firms. Where bilateral military drills and exercises once signaled mutual geostrategic support, they may soon indicate growing Russian fealty to specific Chinese themes and strategic objectives.

President Putin’s concessions to President Xi during the latter’s March 2023 visit to Moscow signaled Russia’s ongoing decay toward a junior partnership in a Chinese-dominated security framework. (CSIS, 2022; *The Economist.com*, 2023) The United States must play close attention to this evolution, calibrating and recalibrating its treatment of Russian leadership in a manner that inhibits a formal Sino-Russian security alliance. (Lynch, 2022)

### *Messaging Capabilities for Diplomatic and Ideological Influence on Political Norms and Values*

The current structure of the international diplomatic order, with a multitude of interlocking organizations and institutions, aligns with major American strategic aims and ideological values. These feature an emphasis on globalized rules and norms advocating the primacy of free and open societies, commercial markets, protection of political rights, and the rule of law in a UN-led multinational diplomatic environment for the peaceful, collective resolution of disputes. The structure also features a Western preference for liberal democratic governance. (Mazarr and McDonald, 2022)

Divergent great power ideologies and strategic objectives have torn the fabric of globalized norms and procedures, increasingly fragmenting domains once characterized by broad inter-state collaboration and coordination. Like the fragmenting trade, finance, and

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infrastructure investment domains discussed earlier, once-universal norms for comity and peaceful interactions in the Arctic, in outer space, in cyberspace, and in other domains have splintered along lines of divergent great power preferences.

History informs that such domain fragmentation is the norm for intensifying great power rivalries. (Gilpin, 1981) For example, key elements of the electromagnetic (EM) spectrum evolved in an era of multi-state great power competition where the rivalry was not intense, the technological dominance of one great power—Great Britain—was unrivaled, and where London and her great power competitors could collaborate in shared international communication norms favored by London for mutual wealth gains. But mid-decade in the 1900s, Great Britain and Imperial Germany's intensifying rivalry eroded confidence in the value of a shared EM domain, focused on relative gains and losses, and led to domain fragmentation. (Kennedy, 1971; Lambert, 2012)

As detailed in Chapter 21, cyberspace today is fragmenting as great power rivalry intensifies. The rise of the cyber domain parallels—but does not exactly match—the EM domain trajectory of 100 years ago. The cyber domain rose on a backbone of American-driven technology, rules, norms, and procedures in an era where no other nation possessed the relative power to contest American technological know-how or preferred norms and rules for the global internet. (Fischerkeller et al., 2022) America nurtured cyberspace as an international medium of commercial and scientific exchange with common adherence to liberal Western laws, norms, and procedures. Washington's values underpinned a globalized technological revolution. (CFR, 2022) Despite the relative comity and cooperation across the internet in this early era, the states of the world never did generate a comprehensive legal or normative framework for governing acceptable conduct in cyberspace. (Lewis, 2017; Fischerkeller et al., 2022) Even then, the level of distrust among major states was too high to conceive of a legally binding cyber treaty or durable nonbinding norms and confidence-building measures (Lewis, 2017).

As with the case of the EM domain, global cyberspace has become contested between today's three great powers. Since at least 2008, the Russian state has directed coercive peacetime cyber campaigns aimed at weakening America's relative power in the four major areas of: public confidence in the safety of American critical infrastructure; the sanctity of the American electoral system; the social stability of American society; and average American trust in their government. (Fischerkeller et al., 2022) Beijing has thrown up a "Great Firewall of China" to prevent the free flow of global information into the hands of Chinese citizens. It also conducts strategic cyber-competitive espionage against the United States to enhance its relative economic wealth. (CFR, 2022) China has pursued a deliberate cyber espionage campaign against American firms and their partners both in China and abroad, focused on the brazen theft of intellectual property along with sensitive commercial data and processes. (Lewis, 2017) China's strategy for cyber operations can be characterized as controlling information at home and stealing secrets abroad. (Aitel et al., 2022a)

Russia and China find threatening the American preference for the free and open exchange of ideas with very little restriction and a global communications architecture that features consensus-based cooperation. They prefer very closed and restrictive communications and exchange, with the state having the right to control the flow of information within and across its borders.

As American cyberspace analyst Clint Watts puts it, the world has entered an era of three separate cyber domains: a free and open one preferred by America and its partners; a largely closed, tightly constrained, and self-interested one preferred by Beijing; and a highly

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manipulated, intimidated, and coercive one preferred by Russia. (Watts, 2019) The June 2022 US Council on Foreign Relations report put it succinctly by noting that the competition for internet data in cyberspace is the new locus for great power strategic competition short of armed conflict; and cyberspace fragmentation is here to stay. (CFR, 2022)

The fragmentation of cyberspace under pressure from growing great power rivalry is consistent with the history of fragmentation and separation of global domains of state-to-state interaction under growing geostrategic duress. (Gilpin, 1975; Waltz, 1979) As with the EM domain and others before it, the cyber domain promises a trajectory of increasing fragmentation until a major geostrategic shock—like an armed direct power conflict—reframes global power distributions and relationships in a manner more conducive to a cooperative and collaborative norm. (Wong, 2019)

### **Prospects for Direct Armed Conflict between the Great Powers**

Direct great power war is an ever-present and very dangerous risk during historic periods of multi-state rivalries, although not a normal occurrence during the early decades of great power rivalry. (Allison, 2017; Lynch, 2020) The exceptions normally feature severe leadership miscalculation about the capabilities and intentions of the rival great power. (Lynch, 2020) As great power tensions rise and the mechanisms for coordination and collaboration between them recede, it takes extraordinary statesmanship to compete effectively with a rivalrous great power and not antagonize it to the point where direct armed conflict becomes unavoidable. (Gilpin, 1981; Kennedy, 1987; Lynch, 2020)

The most frequent strategic miscalculations are those when one great power generates extremely inflexible and time-sensitive war plans, or when a great power poorly signals to a rival contemplating a direct military clash that it will use armed conflict directly against that rival should it resort to arms. The start of World War I after less than two decades of great power rivalrous competition came from grave miscalculations featuring both errors. Imperial Germany crafted an extremely brittle war timetable, the Schlieffen Plan requiring a preemptive military invasion of western Europe to knock out France and England before their Triple Entente partner Russia could mobilize to Germany's east. (Fisher, 1961; Remak, 1967; Levy and Vazquez, 2014) Simultaneously, Great Britain fueled German impatience and impetus to rashly attack, because London sent Berlin and Paris mixed signals about whether it would deploy a full British Army to the continent to stand with France. (Ritter, 1958; Levy and Vazquez, 2014) The atypical eruption of great power wars during the early decades of rivalrous competition demonstrate that agile, flexible wartime plans and clear signaling of when a great power will resort to direct armed conflict against a rival are two antidotes to the ever-present risk of unintended great power war during periods of intense geostrategic competition.

The ongoing second decade of multi-state great power competition can be expected to follow historic patterns. The three great powers will indirectly test each other's military strengths short of direct armed clash while forming and reframing military alliances, supporting proxy war partners, and participating in arms races. (Levy, 1985; Hoffman and Orner, 2021) Each of these forms of military competition short of armed conflict risk escalation into direct clash. But even the "hard cases" can be managed short of great power war. (Hastings, 2023)

The Russo-Ukraine war provides one example. The United States and Russia are deeply involved in that intense proxy war, Moscow directly and Washington indirectly. (Duffy Toft



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and Monica, 2022) Both great powers take deliberate steps to avoid direct armed clash. The United States has emphasized that it would defend every inch of NATO partner territory, leaving Moscow in no doubt that a wider war into western Europe would mean direct combat with the United States. (Bose and Charlish, 2023) At the same time, the United States has carefully metered military plans and weapons used by Ukraine during Kyiv's righteous defense against Russian aggression. Washington and NATO partners have limited Ukrainian access to those weapons highly capable of striking at Russia proper, discouraged overt Ukrainian cross-border military operations into Russian territory, and refrained from formally stationing NATO country forces or advisory groups in Ukraine. (Pifer, 2023)

Taiwan is the other major "hard case" that could trigger direct great power war in the coming decade. But a Sino-American war over Taiwan can be deterred. Washington will need to assure Beijing that any attempt to resolve the Taiwan issue with military force would have extremely high costs for China and include direct US military intervention. (Hastings, 2023) Beginning in 2021, American President Joe Biden made public statements indicating that direct American military engagement would occur should China invade Taiwan or try to strangle its viability with military means. (Mao, 2022) For all its impatient rhetoric over Taiwan, analysts view Beijing as fundamentally risk averse when it comes to any near-term military clash with the United States, in part because it recognizes that the PLA has had no actual combat experience for more than 40 years and that the United States military features globally tested, battle-hardened forces and doctrines that are hard for China to properly prepare for in war game simulations. (Heath, 2018; Roy, 2020)

At the same time, Washington and Beijing can avoid deadly direct armed conflict if both craft flexible war plans that avoid rigid timelines or escalation ladders and that build-in space for leadership communication before any direct military confrontation. Bilateral political and military negotiations that build-up guard rails to inhibit direct armed confrontation and develop protocols that de-escalate accidental military incidents are called for to prevent a Taiwan scenario from triggering a war unwelcomed in Washington or Beijing over the coming decade. (Mazarr and McDonald, 2022)

The specter of direct great power war will ever-loom over this era of multi-state great power competition. But great power aversion to such a risky clash in the early decades of their competition should inhibit rash decision-making or accidental war for the foreseeable future.

### Conclusion

Past eras of multi-state great power competition inform future expectations. The coming decade will feature intensifying competition in the Sino-American dyad. Russia will decline. Its missteps in Ukraine will hasten a long-forecast relative power decay but it will remain a great power. Washington and especially Beijing each will work to preserve Moscow's great power status while jousting to gain most from Russia's descent. China will continue a strategic rise in relative power but at a slower pace than before the United States began disengaging from selected sectors of the Chinese economy. The United States will experience relative power decline but at a slowing tempo as Washington and its partners more severely limit formerly unfettered Chinese access to global markets and high-end technologies.

China and the United States will vigorously contest global rules, norms, and procedures in a competition that will fragment multiple global domains but is unlikely to produce a decisive outcome. The fragmentation of globalized chains and networks will increase costs

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of interchange between the great powers and for all states in the international system. Middle and lesser powers will seek opportunities to mix-and-match their allegiances, partnering with one great power on some activities and with another great power for separate interactions.

India will accelerate an ascent toward great power status without attaining it. However, New Delhi will play an increasingly prominent role arbitrating great power competition especially in the Global South.

Escalation of great power competition into direct great power war will loom as an unintended and undesirable possibility from the intensifying rivalry among Russia, China, and the United States. However, it remains unlikely to erupt in the near term due to the historical pattern of great power aversion to such a potentially devastating clash in the early decades of geostrategic competition. The extreme caution exercised by Russia and the United States in the Ukraine war demonstrates this premise indicating that direct great power military clash remains unlikely without a grievous failure of foresight. Great power leadership and open lines of communications will be required to reinforce natural caution to avoid direct military clash. Vigorous competition short of direct armed conflict can be preserved and deterrence maintained in the near term by minimizing the most substantive risks from severe miscalculation of relative power ratios, excessively brittle great power war plans, or protagonists' misunderstanding of the red lines defining where and when rival leaders will resort to direct armed clash.

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Author Queries

[AQ1] Please provide reference for “der Leyen and Ursula, 2023”.

[AQ2] Please cite the below references in the text:

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