



FOREIGN AFFAIRS

The Axis of Upheaval

How America's Adversaries Are Uniting to Overturn the Global Order

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In the early morning of January 2, Russian forces launched a massive missile attack on the Ukrainian cities of Kyiv and Kharkiv that killed at least five civilians, injured more than 100, and damaged infrastructure. The incident was notable not just for the harm it caused but also because it showed that Russia was not alone in its fight. The Russian attack that day was carried out with weapons fitted with technology from China, missiles from North Korea, and drones from Iran. Over the past two years, all three countries have become critical enablers of Moscow's war machine in Ukraine.

Since Russia's invasion in February 2022, Moscow has deployed more than 3,700 Iranian-designed drones. Russia now produces at least 330 on its own

each month and is collaborating with Iran on plans to build a new drone factory inside Russia that will boost these numbers. North Korea has sent Russia ballistic missiles and more than 2.5 million rounds of ammunition, just as Ukrainian stockpiles have dwindled. China, for its part, has become Russia's most important lifeline. Beijing has ramped up its purchase of Russian oil and gas, putting billions of dollars into Moscow's coffers. Just as significantly, China provides vast amounts of warfighting technology, from semiconductors and electronic devices to radar- and communications-jamming equipment and jet-fighter parts. Customs records show that despite Western trade sanctions, Russia's imports of computer chips and chip components have been steadily rising toward prewar levels. More than half of these goods come from China.

The support from China, Iran, and North Korea has strengthened Russia's position on the battlefield, undermined Western attempts to isolate Moscow, and harmed Ukraine. This collaboration, however, is just the tip of the iceberg. Cooperation among the four countries was expanding before 2022, but the war has accelerated their deepening economic, military, political, and technological ties. The four powers increasingly identify common interests, match up their rhetoric, and coordinate their military and diplomatic activities. Their convergence is creating a new axis of upheaval—a development that is fundamentally altering the geopolitical landscape.

The group is not an exclusive bloc and certainly not an alliance. It is, instead, a collection of dissatisfied states converging on a shared purpose of overturning the principles, rules, and institutions that underlie the prevailing international system. When these four countries cooperate, their actions have far greater effect than the sum of their individual efforts. Working together, they enhance one another's military capabilities; dilute the efficacy of U.S. foreign policy tools, including sanctions; and hinder the ability of

Washington and its partners to enforce global rules. Their collective aim is to create an alternative to the current order, which they consider to be dominated by the United States.

Too many Western observers have been quick to dismiss the implications of coordination among China, Iran, North Korea, and Russia. The four countries have their differences, to be sure, and a history of distrust and contemporary fissures may limit how close their relationships will grow. Yet their shared aim of weakening the United States and its leadership role provides a strong adhesive. In places across Asia, Europe, and the Middle East, the ambitions of axis members have already proved to be destabilizing. Managing the disruptive effects of their further coordination and preventing the axis from upsetting the global system must now be central objectives of U.S. foreign policy.

THE ANTI-WESTERN CLUB

Collaboration among axis members is not new. China and Russia have been strengthening their partnership since the end of the Cold War—a trend that accelerated rapidly after Russia annexed Crimea in 2014. China's share of Russian external trade doubled from ten to 20 percent between 2013 and 2021, and between 2018 and 2022 Russia supplied a combined total of 83 percent of China's arms imports. Russian technology has helped the Chinese military enhance its air defense, antiship, and submarine capabilities, making China a more formidable force in a potential naval conflict. Beijing and Moscow have also expressed a shared vision. In early 2022, Russian President Vladimir Putin and Chinese leader Xi Jinping signed a joint manifesto pledging a “no limits” partnership between their two countries and calling for “international relations of a new type”—in other words, a multipolar system that is no longer dominated by the United States.

Iran has strengthened its ties with other axis members as well. Iran and Russia worked together to keep Syrian President Bashar al-Assad in power after the onset of civil war in 2011. Joining Russia's efforts, which include major energy agreements with Iran to shield Tehran from the effects of U.S. sanctions, China has purchased large quantities of Iranian oil since 2020. North Korea, for its part, has counted China as its primary ally and trade partner for decades, and North Korea and Russia have maintained warm, if not particularly substantive, ties. Iran has purchased North Korean missiles since the 1980s, and more recently, North Korea is thought to have supplied weapons to Iranian proxy groups, including Hezbollah and possibly Hamas. Pyongyang and Tehran have also bonded over a shared aversion to Washington: as a senior North Korean official, Kim Yong Nam, declared during a ten-day trip to Iran in 2017, the two countries "have a common enemy."

But the Russian invasion of Ukraine in 2022 hastened the convergence among these four countries in ways that transcend their historical ties. Moscow has been among Tehran's top suppliers of weapons over the past two decades and is now its largest source of foreign investment; Russian exports to Iran rose by 27 percent in the first ten months of 2022. Over the past two years, according to the White House, Russia has been sharing more intelligence with and providing more weapons to Hezbollah and other Iranian proxies, and Moscow has defended those proxies in debates at the UN Security Council. Last year, Russia displaced Saudi Arabia as China's largest source of crude oil and trade between the two countries topped \$240 billion, a record high. Moscow has also released millions of dollars in North Korean assets that previously sat frozen in Russian banks in compliance with Security Council sanctions. China, Iran, and Russia have held joint naval exercises in the Gulf of Oman three years in a row, most recently in March

2024. Russia has also proposed trilateral naval drills with China and North Korea.

The growing cooperation among China, Iran, North Korea, and Russia is fueled by their shared opposition to the Western-dominated global order, an antagonism rooted in their belief that that system does not accord them the status or freedom of action they deserve. Each country claims a sphere of influence: China's "core interests," which extend to Taiwan and the South China Sea; Iran's "axis of resistance," the set of proxy groups that give Tehran leverage in Iraq, Lebanon, Syria, Yemen, and elsewhere; North Korea's claim to the entire Korean Peninsula; and Russia's "near abroad," which for the Kremlin includes, at a minimum, the countries that composed its historic empire. All four countries see the United States as the primary obstacle to establishing these spheres of influence, and they want Washington's presence in their respective regions reduced.

All reject the principle of universal values and interpret the West's championing of its brand of democracy as an attempt to undermine their legitimacy and foment domestic instability. They insist that individual states have the right to define democracy for themselves. In the end, although they may make temporary accommodations with the United States, they do not believe that the West will accept their rise (or return) to power on the world stage. They oppose external meddling in their internal affairs, the expansion of U.S. alliances, the stationing of American nuclear weapons abroad, and the use of coercive sanctions.

Any positive vision for the future, however, is more elusive. Yet history shows that a positive agenda may not be necessary for a group of discontented powers to cause disruption. The 1940 Tripartite Pact uniting Germany, Italy, and Japan—the original "Axis"—pledged to "establish and maintain a new

order of things” in which each country would claim “its own proper place.” They did not succeed, but World War II certainly brought global upheaval. The axis of China, Iran, North Korea, and Russia does not need a coherent plan for an alternative international order to upset the existing system. The countries’ shared opposition to the present order’s core tenets and their determination to bring about change form a powerful basis for collaborative action.

Fissures do exist among members of the axis. China and Russia vie for influence in Central Asia, for instance, while Iran and Russia compete for oil markets in China, India, and elsewhere in Asia. The four countries have complicated histories with each other, too. The Soviet Union invaded Iran in 1941; Russia and China settled their long-standing border dispute only in 2004 and had both previously supported efforts to limit Iran’s nuclear programs and to isolate North Korea. Today, China may look askance at North Korea’s deepening relationship with Russia, worrying that an emboldened Kim Jong Un will aggravate tensions in Northeast Asia and draw in a larger U.S. military presence, which China does not want. Yet their differences are insufficient to dissolve the bonds forged by their common resistance to a Western-dominated world.

CATALYST IN THE KREMLIN

Moscow has been the main instigator of this axis. The invasion of Ukraine marked a point of no return in Putin’s long-standing crusade against the West. Putin has grown more committed to destroying not only Ukraine but also the global order. And he has doubled down on relationships with like-minded countries to accomplish his aims. Cut off from Western trade, investment, and technology since the start of the war, Moscow has had little choice but to rely on its partners to sustain its hostilities. The ammunition, drones, microchips, and other forms of aid that axis members have sent have

been of great help to Russia. But the more the Kremlin relies on these countries, the more it must give away in return. Beijing, Pyongyang, and Tehran are taking advantage of their leverage over Moscow to expand their military capabilities and economic options.

Even before the Russian invasion, Moscow's military assistance to Beijing was eroding the United States' military advantage over China. Russia has provided ever more sophisticated weapons to China, and the two countries' joint military exercises have grown in scope and frequency. Russian officers who have fought in Syria and in Ukraine's Donbas region have shared valuable lessons with Chinese personnel, helping the People's Liberation Army make up for its lack of operational experience—a notable weakness relative to more seasoned U.S. forces. China's military modernization has reduced the urgency of deepening defense cooperation with Russia, but the two countries are likely to proceed with technology transfers and joint weapons development and production. In February, for instance, Russian officials confirmed that they were working with Chinese counterparts on military applications of artificial intelligence. Moscow retains an edge over Beijing in other key areas, including submarine technology, remote sensing satellites, and aircraft engines. If China can pressure a more dependent Russia to provide additional advanced technologies, the transfer could further undermine the United States' advantages.

A similar dynamic is playing out in Russia's relations with Iran and North Korea. Moscow and Tehran have forged what the Biden administration has called an “unprecedented defense partnership” that upgrades Iranian military capabilities. Russia has provided Iran with advanced aircraft, air defense, intelligence, surveillance, reconnaissance, and cyber-capabilities that would help Tehran resist a potential U.S. or Israeli military operation. And in return for North Korea's ammunition and other military support to Russia,

Pyongyang is reportedly seeking advanced space, missile, and submarine technology from Moscow. If Russia were to comply with those requests, North Korea would be able to improve the accuracy and survivability of its nuclear-capable intercontinental ballistic missiles and use Russian nuclear propulsion technology to expand the range and capability of its submarines. Already, Russia's testing of North Korean weapons on the battlefield in Ukraine has supplied Pyongyang with information it can use to refine its missile program, and Russian assistance may have helped North Korea launch a military spy satellite in November after two previous failures last year.

Strong relations among the four axis countries have emboldened leaders in Pyongyang and Tehran. Kim, who now enjoys strong backing from both China and Russia, abandoned North Korea's decades-old policy of peaceful unification with South Korea and stepped up its threats against Seoul, indulged in nuclear blackmail and missile tests, and expressed a lack of any interest in talks with the United States. And although there does not appear to be a direct connection between their deepening partnership and Hamas's attack on Israel on October 7, growing support from Russia likely made Iran more willing to activate its regional proxies in the aftermath. The coordinated diplomacy and pressure from Russia and the West that brought Iran into the 2015 nuclear deal are now a distant memory. Today, Moscow and Beijing are helping Tehran resist Western coercion, making it easier for Iran to enrich uranium and reject Washington's efforts to negotiate a new nuclear agreement.

AMERICA UNDERMINED

Collaboration among the axis members also reduces the potency of tools that Washington and its partners often use to confront them. In the most glaring example, since the start of the war in Ukraine, China has supplied

Russia with semiconductors and other essential technologies that Russia previously imported from the West, undercutting the efficacy of Western export controls. All four countries are also working to reduce their dependence on the U.S. dollar. The share of Russia's imports invoiced in Chinese renminbi jumped from three percent in 2021 to 20 percent in 2022. And in December 2023, Iran and Russia finalized an agreement to conduct bilateral trade in their local currencies. By moving their economic transactions out of reach of U.S. enforcement measures, axis members undermine the efficacy of Western sanctions, as well as anticorruption and anti-money-laundering efforts.

Taking advantage of their shared borders and littoral zones, China, Iran, North Korea, and Russia can build trade and transportation networks safe from U.S. interdiction. Iran, for example, ships drones and other weapons to Russia across the Caspian Sea, where the United States has little power to stop transfers. If the United States were engaged in conflict with China in the Indo-Pacific, Beijing could seek support from Moscow. Russia might increase its overland exports of oil and gas to its southern neighbor, reducing China's dependence on maritime energy imports that U.S. forces could block during a conflict. Russia's defense industrial base, now in overdrive to supply weapons for Russian troops in Ukraine, could later pivot to sustain a Chinese war effort. Such cooperation would increase the odds of China's prevailing over the American military and help advance Russia's goal of diminishing the United States' geopolitical influence.

The axis is also hindering Washington's ability to rally international coalitions that can stand against its members' destabilizing actions. China's refusal to condemn Russia's invasion of Ukraine, for example, made it far easier for countries across Africa, Latin America, and the Middle East to do the same. And Beijing and Moscow have impeded Western efforts to isolate

Iran. Last year, they elevated Iran from observer to member of the Shanghai Cooperation Organization, a predominantly Asian regional body, and then orchestrated an invitation for Iran to join the BRICS—a group that China and Russia view as a counterweight to the West. Iran's regional meddling and nuclear pursuits have made other countries wary of dealing with its government, but its participation in international forums enhances the regime's legitimacy and presents it with opportunities to expand trade with fellow member states.

Parallel efforts by axis members in the information domain further weaken international support for U.S. positions. China, Iran, and North Korea either defended or avoided explicitly condemning Russia's invasion of Ukraine, and they all parroted the Kremlin in accusing NATO of inciting the war. Their response to Hamas's attacks on Israel last October followed a similar pattern. Iran used the state media and social media accounts to express support for Hamas, vilify Israel, and denounce the United States for enabling Israel's military response, while the Russian and, to a lesser extent, Chinese media sharply criticized the United States' enduring support for Israel. They used the war in Gaza to portray Washington as a destabilizing, domineering force in the world—a narrative that is particularly resonant in parts of Africa, Asia, Latin America, and the Middle East. Even if axis members do not overtly coordinate their messages, they push the same themes, and the repetition makes them appear more credible and persuasive.

AN ALTERNATIVE ORDER?

Global orders magnify the strength of the powerful states that lead them. The United States, for instance, has invested in the liberal international order it helped create because this order reflects American preferences and extends U.S. influence. As long as an order remains sufficiently beneficial to most members, a core group of states will defend it. Dissenting countries,

meanwhile, are bound by a collective action problem. If they were to defect en masse, they could succeed in creating an alternative order more to their liking. But without a core cluster of powerful states around which they can coalesce, the advantage remains with the existing order.

For decades, threats to the U.S.-led order were limited to a handful of rogue states with little power to upend it. But Russia's invasion of Ukraine and the restructuring of interstate relations it prompted have lifted the constraint on collective action. The axis of upheaval represents a new center of gravity, a group that other countries dissatisfied with the existing order can turn to. The axis is ushering in an international system characterized by two orders that are becoming increasingly organized and competitive.

Historically, competing orders have invited conflict, especially at the geographical seams between them. Wars arise from specific conditions, such as a territorial dispute, the need to protect national interests or the interests of an ally, or a threat to the survival of a regime. But the likelihood that any of those conditions will lead to war increases in the presence of dueling orders. Some political science researchers have found that periods in which a single order prevailed—the balance-of-power system maintained by the Concert of Europe for much of the nineteenth century, for example, or the U.S.-dominated post-Cold War era—were less prone to conflicts than those characterized by more than one order, such as the multipolar period between the two world wars and the bipolar system of the Cold War.

The world has gotten a preview of the instability this new era of competing orders will bring, with potential aggressors empowered by the axis's normalization of alternative rules and less afraid of being isolated if they act out. Already, Hamas's attack on Israel threatens to engulf the wider Middle East in war. Last October, Azerbaijan forcibly took control of Nagorno-

Karabakh, a breakaway region inhabited by ethnic Armenians. Tensions flared between Serbia and Kosovo in 2023, too, and Venezuela threatened to seize territory in neighboring Guyana in December. Although internal conditions precipitated the coups in Myanmar and across Africa's Sahel region since 2020, the rising incidence of such revolts is connected to the new international arrangement. For many years, it seemed that coups were becoming less common, in large part because plotters faced significant costs for violating norms. Now, however, the calculations have changed.

Overthrowing a government may still shatter relations with the West, but the new regimes can find support in Beijing and Moscow.

Further development of the axis would bring even greater tumult. So far, most collaboration among China, Iran, North Korea, and Russia has been bilateral. Trilateral and quadrilateral action could expand their capacity for disruption. Countries such as Belarus, Cuba, Eritrea, Nicaragua, and Venezuela—all of which chafe against the U.S.-led, Western-dominated system—could also begin working more closely with the axis. If the group grows in size and tightens its coordination, the United States and its allies will have a more difficult time defending the recognized order.

TAKING ON THE REVISIONISTS

For now, U.S. national security strategy ranks China as a higher priority than Iran, North Korea, or even Russia. That assessment is strategically sound when considering the threat that individual countries pose to the United States, but it does not fully account for the cooperation among them. U.S. policy will need to address the destabilizing effects of revisionist countries' acting in concert, and it should try to disrupt their coordinated efforts to subvert important international rules and institutions. Washington, furthermore, should undercut the axis's appeal by sharpening the attractions of the existing order.

If the United States is to counter an increasingly coordinated axis, it cannot treat each threat as an isolated phenomenon. Washington should not ignore Russian aggression in Europe, for example, in order to focus on rising Chinese power in Asia. It is already clear that Russia's success in Ukraine benefits a revisionist China by showing that it is possible, if costly, to thwart a united Western effort. Even as Washington rightly sees China as its top priority, addressing the challenge from Beijing will require competing with other members of the axis in other parts of the world. To be effective, the United States will need to devote additional resources to national security, engage in more vigorous diplomacy, develop new and stronger partnerships, and take a more activist role in the world than it has of late.

Driving wedges between members of the axis, on the other hand, will not work. Before Russia's invasion of Ukraine, some strategists suggested that the United States align itself with Russia to balance China. After the war began, a few held out hope that the United States could join China in an anti-Russian coalition. But unlike President Richard Nixon's opening to China in the 1970s, which took advantage of a Sino-Soviet split to draw Beijing further away from Moscow, there is no equivalent ideological or geopolitical rivalry for Washington to exploit today. The price of trying would likely involve U.S. recognition of a Russian or Chinese sphere of influence in Europe and Asia—regions central to U.S. interests and ones that Washington should not allow a hostile foreign power to dominate. Breaking Iran or North Korea off from the rest of the axis would be even more difficult, given their governments' revisionist, even revolutionary aims. Ultimately, the axis is a problem the United States must manage, not one it can solve with grand strategic gestures.

Neither the West nor the axis will become wholly distinct political, military, and economic blocs. Each coalition will compete for influence all over the

world, trying to draw vital countries closer to its side. Six “global swing states” will be particularly important: Brazil, India, Indonesia, Saudi Arabia, South Africa, and Turkey are all middle powers with enough collective geopolitical weight for their policy preferences to sway the future direction of the international order. These six countries—and others, too—can be expected to pursue economic, diplomatic, military, and technological ties with members of both orders. U.S. policymakers should make it a priority to deny advantages to the axis in these countries, encouraging their governments to choose policies that favor the prevailing order. In practice, that means using trade incentives, military engagement, foreign aid, and diplomacy to prevent swing states from hosting axis members’ military bases, giving axis members access to their technology infrastructure or military equipment, or helping them circumvent Western sanctions.

Although competition with the axis may be inevitable, the United States must try to avoid direct conflict with any of its members. To that end, Washington should reaffirm its security commitments to bolster deterrence in the western Pacific, in the Middle East, on the Korean Peninsula, and on NATO’s eastern flank. The United States and its allies should also prepare for opportunistic aggression. If a Chinese invasion of Taiwan prompts U.S. military intervention, for instance, Russia may be tempted to move against another European country, and Iran or North Korea could escalate threats in their regions. Even if the axis members do not coordinate their aggression directly, concurrent conflicts could overwhelm the West. Washington will therefore need to press allies to invest in capabilities that the United States could not provide if it were already engaged in another military theater.

Confronting the axis will be expensive. A new strategy will require the United States to bolster its spending on defense, foreign aid, diplomacy, and strategic communications. Washington must direct aid to the frontlines of

conflict between the axis and the West—including assistance to Israel, Taiwan, and Ukraine, all of which face encroachment by axis members. Revisionists are emboldened by the sense that political divisions at home or exhaustion with international engagement will keep the United States on the sidelines of this competition; a comprehensive, well-resourced U.S. strategy with bipartisan support would help counter that impression. The alternative—a reduction in the U.S. global presence—would leave the fate of crucial regions in the hands not of friendly local powers but of axis members seeking to impose their revisionist and illiberal preferences.

THE FOUR-POWER THREAT

There is a tendency to downplay the significance of growing cooperation among China, Iran, North Korea, and Russia. By turning to Beijing, this argument goes, Moscow merely signals its acceptance of the role of junior partner. Obtaining drones from Iran and munitions from North Korea demonstrates the desperation of a Russian war machine that incorrectly assumed that conquering Ukraine would be easy. China's embrace of Russia shows only that Beijing could not achieve the positive relationship it originally sought with Europe and other Western powers. North Korea remains the world's most isolated country, and Iran's disruptive activities have backfired, strengthening regional cooperation among Israel, the United States, and Gulf countries.

Such analysis ignores the severity of the threat. Four powers, growing in strength and coordination, are united in their opposition to the prevailing world order and its U.S. leadership. Their combined economic and military capacity, together with their determination to change the way the world has worked since the end of the Cold War, make for a dangerous mix. This is a group bent on upheaval, and the United States and its partners must treat the axis as the generational challenge it is. They must reinforce the

foundations of the international order and push back against those who act most vigorously to undermine it. It is likely impossible to arrest the emergence of this new axis, but keeping it from upending the current system is an achievable goal.

The West has everything it needs to triumph in this contest. Its combined economy is far larger, its militaries are significantly more powerful, its geography is more advantageous, its values are more attractive, and its democratic system is more stable. The United States and its partners should be confident in their own strengths, even as they appreciate the scale of effort necessary to compete with this budding anti-Western coalition. The new axis has already changed the picture of geopolitics—but Washington and its partners can still prevent the world of upheaval the axis hopes to usher in.

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