TECH POLICY BRIEF

AI cooperation under the shadow of China's Digital Silk Road

Kenton Thibaut

DFRLab

Atlantic Council

TECHNOLOGY PROGRAMS

DFRLab

About the Digital Forensic Research Lab

The Digital Forensic Research Lab (DFRLab) at the Atlantic Council is a first of its kind organization with technical and policy expertise on disinformation, connective technologies, democracy, and the future of digital rights. Incubated at the Atlantic Council in 2016, the DFRLab is a field-builder, studying, defining, and informing approaches to the global information ecosystem and the technology that underpins it.

About the Democracy + Tech Initiative

The Democracy + Tech Initiative creates policy practices that align global stakeholders toward tech and governance that reinforces, rather than undermines, open societies. It builds on the DFRLab's established track record and leadership in the open-source field, empowering global communities to promote transparency and accountability online and around the world.

Version 1.0 — Public Release

Cover imagery derived from the Catalan Atlas (1375) by Abraham Cresques, held in the Bibliothèque nationale de France. Digital scan sourced from Wikimedia Commons. Fiber optic cable routes representing real Digital Silk Road infrastructure (CPEC, PEACE, AAE-1, TASIM) were composited using Python and the Pillow imaging library. Cover design by Emerson T. Brooking.

Please direct inquiries to:
Atlantic Council
1400 L Street NW, 11th Floor
Washington, DC 20005
February 2026

Author

Kenton Thibaut, resident senior fellow, China at the Atlantic Council's Democracy + Tech Initiative; resident senior fellow at the Atlantic Council's Indo-Pacific Initiative of the Scowcroft Center for Strategy and Security

Contributors

Iria Puyosa, resident senior fellow at the Atlantic Council's Democracy + Tech Initiative

Konstantinos Komaitis, resident senior fellow at the Atlantic Council's Democracy + Tech Initiative

Editor

Layla Mashkoor, deputy director of research at the Atlantic Council's Digital Forensic Research Lab

Table of contents

Executive summary 4

PART I: Understand

The Digital Silk Road: background and context 9
The DSR: evolution and implementation 14
The role of firms in the DSR 21
Integrated deployment and the 'Chinese tech stack' 23
The supporting ecosystem for the DSR: PRC influence in global AI governance 27
Systemic issues and weaknesses of China's approach to AI cooperation under the DSR 29

Part II: Engage

From mapping to strategy: why the Digital Silk Road matters for like-minded democracies 31
A strategy for like-minded democracies: partnering with eMDCs on AI in the context of geopolitical competition 33
Challenges and opportunities for democracies in engaging Global South partners 36

Figures

Figure 1: Cumulative lock-in in the Chinese tech stack 23
Figure 2: Haier COSMOPlat Platform Architecture 25
Figure 3: Challenges to Democratic Engagement 37

References 41

Executive summary

China's Digital Silk Road (DSR)—the digital economy pillar of the Belt and Road Initiative—has become a central channel through which Beijing engages Global South countries on digital infrastructure and, increasingly, artificial intelligence (AI). Initially focused on "hard" connectivity (for example, telecom networks, fiber and submarine cables, etc.), since 2023, the DSR has evolved toward "soft connectivity"—encompassing AI governance diplomacy, standards-setting, capacity-building, and service-layer platforms. This shift reflects both China's domestic economic imperatives (in particular, high-tech overcapacity and constrained access to advanced markets) and its geopolitical objective of shaping a state-centric alternative digital order that elevates government control over rights-based governance.

The DSR operates through a hybrid governance model described by the People's Republic of China (PRC) as "government guidance and enterprise leadership.[1]" In practice, it is best understood as a flexible framework rather than a single top-down program: central guidance sets broad priorities, while firms and subnational actors shape implementation, sometimes retrofitting existing commercial projects into DSR branding. This market-led structure amplifies the role of Chinese firms, which translate policy objectives into durable presence through competitive pricing, integrated offerings, and promotion of technical standards.

A defining feature of the DSR's operational model is integrated deployment via a "Chinese tech stack." Firms increasingly bundle telecom networks, cloud/data centers, applications, and governance frameworks. Adoption at one layer increases incentives to adopt adjacent layers for interoperability and operational continuity, raising switching costs and creating technical and institutional lock-in. This approach is reinforced by coordinated dealmaking that links firms with policy banks and quasi-state intermediaries (including, for example, overseas Chinese chambers of commerce) to reduce transaction costs, manage risk, and accelerate uptake. China's open-source AI development and promotion and localized offerings (including expanded provision of local language services, sovereignty-conscious data center and cloud offerings, and "AI-in-a-box" solutions optimized for constrained compute environments) further strengthen the stack's appeal in Global South contexts.

The DSR's influence is reinforced through multilateral coalition-building and agenda-setting in AI governance. China has been particularly effective in United Nations (UN)-centered processes and South–South groupings, framing AI governance in terms of capacity-building, development, and sovereignty-related priorities. Alignment is visible among key partner states (including Saudi Arabia, Ethiopia, Nigeria, Vietnam, and Cuba, among others), in coalitions such as the BRICS economic grouping and the Group of 77, and in UN bodies and expert mechanisms where PRC narratives gain legitimacy by consciously reflecting developing country priorities.[2]

At the same time, systemic weaknesses complicate the durability of China's approach. These include persistent concerns around privacy, surveillance exports, and lack of oversight; debt sustainability and opaque collateralization practices; growing awareness of the risks and downsides of long-term technological dependency; geopolitical backlash and trust deficits amid intensifying US-China competition; and socio-cultural challenges adapting solutions to local contexts, compounded by uneven ESG (environmental, social, and governance) performance. These frictions create opportunities for alternative partnership models where governments seek greater transparency, resilience, and genuine local ownership.

For like-minded democracies, the strategic challenge is not to "counter" China forum by forum, but to compete by offering a differentiated model built around partner agency, interoperability, and long-term sustainability. Effective engagement must be grounded in concrete offers, encompassing financing, infrastructure, and capacity-building, and should be framed around the priorities of partner governments. The report maps a set of recommended venues for democratic coordination on messaging and strategy and flags arenas

where strategic capture or agenda distortion is more at risk, requiring tighter collective coordination around strategy and messaging.

The report outlines specific, actionable recommendations for like-minded countries in collaborating with Global South partners on AI. These include:

1. Use strategic communications and narrative framing

- **Recommendation:** Emphasize AI for development, inclusive growth/economic transformation, AI accountability, and data justice—terms that resonate with Global South partners more than "safety" or "democratic values" alone. Engagement from Global South countries is most likely to materialize only if AI is framed as a development issue. Positioning AI within the language and priorities of sustainable development creates an entry point that resonates with existing policy agendas and institutional commitments. Absent a clear linkage to the current sustainable development framework, many countries are unlikely to view AI governance as aligned with their immediate priorities or incentives for participation.[3]
- **Mechanism:** Develop culturally relevant messaging and engage local media, think tanks, and influencers.
- **Example:** Highlight AI projects that boost agricultural resilience, healthcare access, or education in African or Latin American contexts (to note, relevant projects can vary significantly based on the economy and development of the target country. For instance, AI applications in transportation and urban planning may be particularly important in South American nations, whereas in the Caribbean, monitoring and adapting to climate change is a top priority).

2. AI governance and infrastructure packages

- **Recommendation:** Pair governance discussions with offers of infrastructure investment, cloud services, and local AI development tools—without hardware dependency.
- **Mechanism:** Leverage the G7's Partnership for Global Infrastructure and Investment (PGII), Development Finance Institutions (DFI) partnerships (e.g. FinDev Canada, the Development Finance Corporation of the United States, British International Investment), and trusted telecom alternatives.[4]
- **Example:** Offer Global South partners digital public infrastructure (DPI) blueprints, like Estonia's examples in the development and promotion of Digital Public Infrastructure (DPI) and Digital Public Goods (DPG), as open-source alternatives to Chinese systems.[5]

3. Invest in capacity-building and talent

- **Recommendation:** Build long-term relationships by training policymakers, engineers, and researchers from emerging markets and developing countries in responsible AI.
- **Mechanism:** Scale initiatives that focus on AI for development; support regional AI centers (e.g., AI4D Africa), and fund scholarships/exchanges.[6] Technology transfer packages, including workforce upskilling, would be highly valuable to Global South partners.
- **Example:** Create AI governance fellowships for Global South officials and researchers at institutions in Western partner countries.

4. Champion inclusive, localized norms

- **Recommendation:** Frame AI governance in terms of co-creation with Global South stakeholders—especially on fairness, language access, and data rights. This will help to overcome perceptions of governance conversations as Western-imposed frameworks.
- **Mechanism:** Partner with regional bodies (e.g. the African Union, ASEAN, CARICOM, Digital Agenda for Latin America and the Caribbean [eLAC]) to develop regional charters for ethical AI. For organizations that already have charters, using existing frameworks such as the Hiroshima Principles, BRICS and G20 statements, and the outputs from the G20 Task Force on Artificial Intelligence and Data Governance would be helpful references for developing a list of the issues democratic partners are positioned to address.[7]
- **Example:** Support translation and localization of UNESCO's AI ethics guidelines into local norms and languages.[8]

5. Prioritize trusted multilateralism

- **Recommendation:** Strengthen engagement in neutral multilateral fora like UNESCO, GPAI, and OECD, while strategically countering China's influence in contested bodies (e.g. ITU). While some Global South partners previously may not have seen the OECD as neutral and considered engagement in the organization as "picking sides," the perception of the G20 among developing countries is shifting, largely due to the leadership of Brazil, South Africa, and India, as well as the African Union's inclusion as a permanent participant. W[9]estern countries should emphasize the growing role of emerging countries in the G20 as part of its communications strategy.
- **Mechanism:** Fund secretariats, propose joint resolutions with emerging markets and developing countries, and promote support for the candidacies of representatives from democratic countries. For example, the recently launched Global Dialogue on AI Governance would be a good forum to engage on this front.[10] Other fora have drawbacks. For example, the Hiroshima AI Process is viewed by a number of Global South governments as a space that may not welcome their inputs, while RightsCon is primarily a civil society space and does not draw significant participation from the governments of developing countries.[11]
- **Example:** Ensure leadership in upcoming UN or OECD AI standard-setting fora include Global South co-chairs.

6. Create a branded initiative on digital governance support for the Global South

- **Recommendation:** Launch a branded initiative offering coordinated digital governance support—legal, technical, financial—tailored for the needs of emerging markets and developing countries.
- **Mechanism:** Build a clearinghouse for data protection laws, AI risk audits, and open-source AI tools.
- **Example:** A "Digital Commons Fund" could support civil society and tech innovation in Global South countries to counterbalance China's state-centric model (A note: If the focus is policy alignment, such an initiative should be integrated with existing financial processes and pathways; however, if the focus is direct financing, establishing an independent initiative may be beneficial in ensuring that conditions are adaptable to the needs of developing countries).

This report proceeds as follows. The first part, "UNDERSTAND," outlines the contours of the DSR—how it is implemented, how it is financed, the role of firms, and the supporting diplomatic strategy the PRC en-

gages in in international fora to create strategic openings for its model of AI governance to spread. The second part, "ENGAGE," outlines key principles, strategies, and concrete recommendations to like-minded democracies on how to better engage with Global South countries on AI governance in the context of this geopolitical competition.

Ultimately, for democratic partners to effectively engage the Global South in AI development, they should emphasize building durable partnerships that advance both innovation and governance. This engagement must go beyond transactional exchanges and avoid being framed solely in terms of geopolitical rivalry with China. Instead, such partnerships should aim to foster inclusive growth, promote ethical approaches to AI governance, and help countries leverage AI in pursuit of sustainable development goals. Ultimately, success will depend on articulating a compelling vision for AI that addresses the priorities of developing nations while upholding values conducive to a fair, inclusive, and sustainable AI future.

PART I

Understand

The Digital Silk Road: background and context

The Digital Silk Road (DSR) is the digital economy and technology pillar of China's Belt and Road Initiative (BRI), widely recognized as President Xi Jinping's signature foreign policy initiative.[12] The DSR seeks to deepen connectivity between China and emerging markets and developing countries, primarily across Asia, Africa, and Latin America, through digital infrastructure exports, technological cooperation, and capacity-building. Artificial intelligence (AI) is one of the DSR's core technological domains. Through the DSR, the People's Republic of China (PRC) aims to export technology, standards, and digital solutions ostensibly aimed at supporting partner countries' digital transformations, while simultaneously deepening bilateral relationships and expanding overseas markets for Chinese technology firms.

The concept behind the Digital Silk Road was first articulated in a 2015 policy document issued by China's macroeconomic planner, the National Development and Reform Commission (NDRC); it highlighted that for the BRI to succeed, the PRC needed to develop an information technology ecosystem that was much more indigenized and less reliant on Western standards and technologies.[13] This information technology system was the foundation upon which Chinese technology firms could achieve the interconnection of both physical and digital infrastructure, a necessary condition for achieving dominance in the digital domain.[14]

In the following years, the DSR grew in prevalence in official policy documents. The DSR was reified as a mechanism of PRC foreign policy at the World Internet Conference in 2017, when China, Laos, Saudi Arabia, Serbia, Turkey, Thailand, and the United Arab Emirates jointly signed the "BRI Digital Economy International Cooperation Initiative" establishing a "digital economy cooperation mechanism to support the Belt and Road.[15]" The DSR was promoted as a stand-alone initiative—no longer simply part of the BRI, but as its own program—at the second Belt and Road Forum in 2019. Whereas the BRI is formally overseen by the NDRC, the Digital Silk Road operates through a looser, more market-led structure, in which a limited set of major technology firms play the primary role in project initiation and execution.[16] The DSR has now become a core part of China's foreign policy agenda, and has attracted growing political and commercial attention—particularly in Western capitals—amid intensifying global competition over digital technologies and AI in particular.[17]

The PRC's DSR engagement is geographically tiered, with Asia as the main focus, extending into the African continent, and encompassing Latin America and the Middle East. In practice, this framing has translated into differentiated regional priorities.

- **Asia as the core:** The BRI largely began as a project to export the PRC's excess production capacity, and the DSR served as a primary mechanism for building out Information Communications Technology (ICT) infrastructure to support the integration of this physical infrastructure with digital connectivity. Asia—in particular, Southeast Asia—is a natural destination for these activities, due to its proximity and market demand for digital infrastructure.[18] Chinese companies have a significant ICT footprint in Association for Southeast Asian Nations (ASEAN) member states, including Indonesia, Malaysia, the Philippines, Singapore, Thailand, Vietnam, and Brunei.[19] For example, under the BRI, PRC companies have expanded submarine cables that land along China's eastern seaboard and are then routed inland to the western provinces, where they interconnect with broader trans-Eurasian networks. This provides Beijing with built-in redundancy and strategic flexibility, allowing Chinese carriers to reroute data in the event of outages while simultaneously creating multiple pathways for future network expansion across Eurasia.[20] DSR initiatives in Southeast Asia have built on the extensive investment PRC companies have made in this physical infrastructure to promote "smart city" initiatives, particularly in Malaysia, Thailand,

Singapore, and Indonesia, where projects built on top of China-provided networks integrate AI-enabled security surveillance systems and intelligent traffic management platforms to deliver governance solutions for local governments.[21]

- **Africa as a key expansion zone:** The African continent, and in particular Sub-Saharan Africa, has been a focus of PRC ICT companies since the early 2000s following the launch of China's "Going Out" strategy in 1999 The aim of this early push was to encourage Chinese companies to establish an international business presence and enhance their global competitiveness.[22] At the time, Huawei and ZTE had risen to become two of the most prominent ICT companies in China, and were looking to expand internationally.[23] Given their comparatively late arrival on the global stage, Chinese companies had a difficult time breaking into established markets in Europe and the United States; Huawei in particular—with founder Ren Zhengfei's public ties to the People's Liberation Army—faced headwinds in establishing a foothold abroad, especially in the United Kingdom, Australia, and other Western countries where security concerns were most salient.[24] However, both Huawei and ZTE saw opportunity to tap into the relatively unexploited African market—in terms of gaining a dominant market share, as places to grow and experiment, and to train up more junior engineers.[25] Both Huawei and ZTE expanded their footprints in the continent drastically in the mid- to late-2000s. By 2021, Huawei had built half of Africa's 3G networks and around 70 percent of its 4G networks.[26] Cooperation under the DSR built upon these earlier waves of Chinese engagement in traditional infrastructure and telecommunications. Ethiopia, Kenya, South Africa, and Egypt have emerged as major partners.[27]
- **Latin America as an emerging area:** Compared to Southeast Asia and Africa, DSR engagement in Latin America remains at an earlier stage. This reflects both geographic and geopolitical constraints: the region is physically separated from mainland China by a large expanse of water and is also embedded in what the United States has long regarded as its sphere of influence, with Washington remaining the region's dominant economic and security partner.[28] Beijing's first policy paper on Latin America and the Caribbean, released in 2008, emphasized the PRC's aims to increase trade, investment, and commercial cooperation with the region.[29] China's presence in Latin America expanded markedly following the launch of its "Going Out" strategy, which encouraged firms to invest overseas. This shift was reflected in the sharp surge of capital flows to the region, with Chinese investment jumping by more than 71 percent in 2015 alone.[30] As the BRI ramped up steam in the late 2000s, the PRC issued a white paper on its policy in the region which emphasized the need to step up cooperation on ICT infrastructure.[31] The latest white paper, issued in 2025, doubled down on the PRC's desire to further cooperate with the region on technology transfer, scientific exchange, artificial intelligence, and space cooperation. In particular, the white paper outlined that the PRC would ramp up efforts to promote its BeiDou satellite system (a competitor to the global positioning system [GPS]).[32] Nonetheless, initiatives in agricultural AI, smart cities, and digital public services are unfolding in countries such as Brazil, Argentina, and Chile.[33]
- **More focus on the Middle East:** Cooperation has also expanded in parts of the Middle East. In particular, the PRC sees opportunity for collaboration under the DSR as regional governments pursue state-led digital modernization agendas through initiatives such as Saudi Arabia's Vision 2030 and the United Arab Emirates' We the UAE 2031.[34] Chinese technology and infrastructure giants have embedded themselves deeply in these efforts, with firms like Huawei, ZTE, Alibaba Cloud, and CSCEC Middle East taking on prominent roles in shaping the region's digital transition.[35] For example, at the 2025 Mobile World Congress in Barcelona, Huawei and Zain KSA unveiled a "Cloud-First" agreement extending earlier 5G cooperation by embedding AI-enabled enterprise services into Saudi Arabia's digital infrastructure roadmap, incorporating newly deployed 5.5G testbeds tailored to smart city use cases.[36] Other initiatives across the region in partnership with other PRC technology firms include those related to data centers, smart energy, and smart urban management projects, among others.[37]

China's expanding role in the global digital economy reflects a convergence of policy priorities rather than a single linear strategy.[38] Chinese authorities have elevated digital trade to be a core component of long-term growth planning, while simultaneously retooling international cooperation frameworks to place greater emphasis on digital technologies—a shift that became more pronounced during and after the Covid-19 pandemic.[39] Parallel to these policy changes, the PRC has sought to pursue deeper diplomatic relationships abroad, especially with Global South countries. Beijing sees this as an opportunity to gain broader geopolitical leverage. By cultivating diplomatic alignment across developing regions, Beijing seeks to normalize an alternative vision of international order—one that places a premium on state authority, treats sovereignty as paramount, and reframes civil and human rights as secondary to national security imperatives. Digital technologies and Global South geographies occupy a central place in this strategy. Together, they offer a means to bypass political resistance and economic constraints imposed by Western-dominated systems.[40] Within this framework, the DSR occupies a distinctive role, functioning as a structural anchor for China's wider efforts to influence global governance. The sections that follow trace how these economic imperatives and political objectives are jointly advanced through the DSR.

Economic objectives advanced through the DSR

Initially, the DSR focused on exporting physical digital infrastructure, including cross-border and submarine cables, satellite systems, and telecommunications networks.[41] Its current iteration increasingly leverages emerging technologies—particularly those underpinning China's AI-driven digital economy—positioning the DSR as a vehicle for expanding Chinese technology exports.[42] One key economic driver behind the DSR's expansion is domestic overcapacity in China's high-tech sectors.

Over the past decade, the PRC has prioritized investment in advanced technologies in line with its 13th Five-Year Plan for National Informatization.[43] These policies have substantially expanded China's capacity to manufacture and export digital products and services.[44] As domestic demand has proven insufficient to absorb this capacity, Chinese firms have increasingly relied on overseas markets. This dynamic has contributed to rapid growth in China's high-tech exports, which rose from approximately $360 billion USD in 2009 to $856 billion USD by 2024.[45] The DSR functions as a coordinating framework and branding mechanism for these Chinese technology exports and overseas investments.[46] It supports economic growth at a time when Chinese firms have become more globally competitive, developing countries are accelerating digitalization and exploring AI enabled digital public infrastructure, and Xi Jinping has placed increasing emphasis on technological self-sufficiency amid intensifying strategic competition with the United States.[47]

As access to advanced markets became more constrained for PRC companies due to security concerns over government access to sensitive data and potential security backdoors, Global South markets have become increasingly important for sustaining Chinese firms' growth trajectories.[48] [49] However, the significance of overseas expansion to firms' bottom lines varies by sector. China's leading e-commerce firms still derive the majority of their revenues from the domestic market, though their scale means even limited overseas penetration can be financially meaningful.[50] By contrast, telecommunications firms such as Huawei and ZTE depend heavily on international markets.[51] For these companies, DSR-linked investments are critical to long-term viability. For example, Huawei earned approximately $5.8 billion USD in revenue from Africa in 2019, with roughly 60 percent derived from ICT equipment and services and the remainder from handset sales.[52]

Political objectives advanced through the DSR

Beyond its economic role, the DSR serves as a central instrument of China's foreign policy and reflects Beijing's ambition to shape an alternative digital order in the Global South that challenges Western—particularly US—dominance. Beginning in the mid-2000s, Chinese leaders and analysts increasingly argued that US political, economic, technological, linguistic, and cultural preeminence had enabled what they termed "discourse dominance" (话语权). This concept refers to the ability to structure international norms, values, and institutions in ways that reinforce US interests, including through international economic organizations such as the International Monetary Fund and the World Bank, which Chinese scholars often portray as vehicles for promoting Western capitalist norms.[53]

From Beijing's perspective, the existing international order not only reflects Western dominance but actively reproduces it. As one China-based scholar put it: "US 'digital hegemony' employs dual strategies—institutional competition and discourse construction—to stifle existing South-South digital cooperation…These efforts aim to counterbalance the influence of the Digital Silk Road in the digital sphere and obstruct the advancement of the initiative by imposing a northern-dominated global digital economic order.[54]"

The existing institutional and normative arrangements are therefore viewed as incompatible with China's aspiration to assume what it considers its rightful global role. This critique increasingly intersects with China's thinking on technology and digital power. Chinese official and academic discourse now frames the digital domain as a critical arena for enhancing China's discourse power, with the "Fourth Industrial Revolution" seen as a strategic opportunity to narrow—and potentially reverse—the asymmetry with the United States.[55]

Digital expansion has become embedded in China's broader foreign policy objectives and geopolitical aspirations, serving both as a strategic end in itself and as an infrastructural backbone for Beijing's evolving model of globalization and engagement with the international system.[56] As such, the PRC has launched several global policy initiatives aimed at creating an alternative international digital order to compete with that established by Western nations. Since his rise to power in 2012, President Xi Jinping has promoted the idea of a PRC-led "community of shared future for mankind," based on Chinese principles of international engagement.[57] It rests on the principles of "mutually beneficial cooperation" and respect for state sovereignty via "non-interference" in other states' domestic affairs. These concepts prioritize state-led economic development over individual and civil liberties. This framework is explicitly positioned in contrast to Western human rights models, which Beijing portrays as having served interventionist purposes—for example, in cases such as Afghanistan and Iraq.[58]

In practice, the DSR complements China's broader diplomatic effort to position itself as a global leader and provider of public goods. In his congratulatory message to the 2021 World Internet Conference Wuzhen Summit, Xi Jinping stressed that "digital civilization should…advance the building of a community with a shared future for mankind.[59]" To this end, Beijing advances a model of digital governance grounded in state sovereignty, while simultaneously engaging in multilateral and UN-centered processes to reshape the rules-based order in ways that align with this model.[60] China has sought to portray itself as a champion of Global South interests by advocating a state-centric approach to digital governance within UN fora.

This dynamic is visible in concrete multilateral coordination, particularly in UN processes where China has worked closely with developing-country blocs. One illustration is China's coordination with the Group of 77 (G77), a coalition of 134 developing countries, in negotiations over the UN's Global Digital Compact (GDC). Launched by the UN Secretary-General as part of the Pact for the Future, the GDC addresses issues ranging from digital connectivity and data governance, AI regulation, human rights online, and platform accountability. In the GDC process, China and many G77 members advanced a shared emphasis on sovereignty, development priorities, and state authority.[61]

China's influence within the UN—particularly within the development pillar—has grown steadily, enabling it to emerge as a leading voice in digital governance debates. While coordination between China and the G77 has been uneven across other issue areas, this convergence reflects both a weakening consensus around the multistakeholder model of internet governance and the growing appeal of state-centric alternatives.[62] [63] Although the GDC does not institutionalize China's preferred model, the negotiations provided Beijing with a prominent platform to socialize its governance concepts and build coalition support.

Against this backdrop, participation in DSR projects can shape how partner countries engage with China's digital governance narratives in multilateral settings. Those countries that participate in PRC DSR projects may be more receptive to China's narratives in multilateral fora—supporting UN resolutions on AI capacity-building, endorsing UN-led governance, and affirming South–South cooperation. DSR influence can translate into political support, as Global South countries champion inclusive governance, oppose exclusive alliances (like Western technology mechanisms), and back Chinese proposals in venues such as BRICS and in UN fora.

The DSR: evolution and implementation

Despite the prominence of the DSR in official PRC policy documents, analysts diverge in their interpretations of the coherence of the DSR as a policy mechanism in practice. Some view it as a tightly coordinated, top-down strategy directed by China's senior leadership; others see it primarily as a loose political label applied retroactively to projects driven by firms or subnational actors.[64] Officially, the Chinese government describes itself as the DSR's "top-level designer, promoter, and coordinator," operating under a model of "government guidance and enterprise leadership.[65]" This framing provides broad policy direction, including:

- **Promoting the uptake and spread of PRC AI standards.** This includes promoting concepts related to AI ethics, data governance, and technical norms, through international fora—particularly under the UN framework—while emphasizing that "AI governance should respect national sovereignty and development paths." [66]T[67]his is explicitly outlined in a December 2017 document issued by the Office of the Leading Group for Promoting the Construction of the Belt and Road, titled Standards Connectivity and Joint Construction of the Belt and Road Action Plan (2018–2020). The document explicitly prioritizes the harmonization of technical standards across emerging domains, including 5G, artificial intelligence, satellite navigation, and related technologies.[68]
- **Establishing an integrated AI delivery model** by foregrounding core digital infrastructure and pairing AI solutions with large-scale physical infrastructure projects to create end-to-end ecosystems built around Chinese technical standards. Advocating a digital version of "to get rich, build roads first," China prioritizes assisting partner nations in establishing "digital foundations" like 5G networks, data centers, and cloud computing platforms to pave the way for subsequent AI application ecosystems.[69] This includes a state-directed strategy of bundling AI technologies and solutions with physical infrastructure projects (e.g., ports, traffic management systems, etc.) constructed by Chinese firms to build a "China Standard" ecosystem.[70]
- **Building out talent abroad.** This includes capacity-building initiatives to cultivate digital technology and AI talent in emerging markets and developing countries (EMDCs) through training programs, scholarships, and joint laboratories, aiming to enhance soft power influence. For example, China has hosted numerous training sessions on big data and AI technology for ASEAN nations.[71]

Despite policy guidance, DSR implementation reflects the broader dynamics of Chinese bureaucratic politics. Central initiatives such as the BRI and DSR are interpreted and executed by a wide range of actors, including provincial governments and firms, whose incentives and strategies often diverge.[72] Scholars have documented how local governments selectively implement, reinterpret, or instrumentalize central policies. For example, in "More than Peripheral: How Provinces Influence China's Foreign Policy," Audrye Wong identifies strategies ranging from symbolic compliance to selective implementation and policy feedback.[73]

Chinese technology firms exhibit similar variation. Many pursue independent globalization strategies that predate or extend beyond the DSR framework, sometimes targeting non-BRI countries or competing directly with one another within DSR markets.[74] In Southeast Asia, for instance, both Tencent and Alibaba have framed existing investments as DSR projects to secure political support, even though these initiatives largely aligned with preexisting commercial strategies.[75]

These dynamics suggest that the DSR is less a fixed policy program than a flexible framework whose meaning and implementation have shifted over time. Understanding the DSR therefore requires not only examining its stated objectives and governance model, but also tracing how its emphasis, instruments, and level of central coordination have evolved across distinct phases.

From 'Hard' to 'Soft' connectivity

From 2015 to 2019, the DSR emphasized "hard" digital connectivity, including fiber optic cables, telecommunications networks, and smart city infrastructure. During this period, national-level guidance was relatively prominent.[76]

Beginning in 2019, however, references to the DSR declined sharply in official rhetoric. This coincided with intensified US efforts to discourage partners from adopting Chinese hardware, including US President Donald Trump's Clean Network Initiative.[77] Heightened scrutiny of Chinese telecommunications equipment—particularly Huawei—generated reputational and political costs, prompting Beijing to downplay the DSR at the national level.

Between 2019 and 2023, provincial initiatives proliferated even as central references waned.[78] One dataset tracking DSR-related documents identified twenty-one central-level plans between 2015 and 2019, followed by a surge in provincial activity, including 42 provincial documents issued in 2021 alone.[79]

Since 2023, the DSR has reemerged in central discourse with a renewed emphasis on "soft connectivity," encompassing services, technology diplomacy, and AI governance. In an October 2023 address at the BRI Forum, Xi Jinping explicitly framed BRI cooperation as shifting "from hard connectivity to soft connectivity,[80]" highlighting e-commerce, scientific exchange, and global AI governance.[81] This shift aligns with China's broader national AI strategy. The 2017 New Generation Artificial Intelligence Development Plan explicitly links AI development to the BRI and DSR, calling for international cooperation bases, joint research centers, and the promotion of international AI standards.[82]

In 2023, China introduced the Beijing Initiative on the Belt and Road International Digital Economy Cooperation. Under the initiative, fourteen developing countries agreed to "strengthen digital interconnection and build a Digital Silk Road," including building more and better digital infrastructure, such as: cloud computing; sharing best practices for digital transformation; promoting drones, AI, big data, and IoT for agricultural and industrial upgrading; digitizing public services and civil affairs; exploring deeper cooperation on digital trade, tech investment, and cross-border digital sister-city partnerships; and promoting responsible AI.[83]

From 2021 to 2023, the PRC launched several global initiatives that were meant to serve as China's offer of global public goods to the world—i.e., to "build a common future for mankind"—and to developing countries in particular. These included the Global Development Initiative (GDI), the Global Civilization Initiative (GCI), and the Global Security Initiative (GSI).[84] Under these frameworks, Beijing has stood up several projects specifically related to AI governance and enhancing "soft connectivity." In 2023, for example, the PRC announced the Global AI Governance Initiative (GAIGI), which tied these broader PRC foreign policy priorities of building a "common future" to global cooperation on AI governance. Beijing presented the GAIGI as its overarching vision for shaping global AI governance, framing it as a vehicle for directing AI toward collective human welfare and the construction of what it terms a "shared future for mankind." The initiative foregrounds a purportedly "people-centered" governance model, while simultaneously emphasizing the primacy of state sovereignty and principles of reciprocity, parity, and mutual gain. It also promotes "inclusive and consultative" rule-making processes, with particular emphasis on elevating the participation and influence of Global South countries in the formulation of international AI governance norms.[85]

The 2024-2025 period saw a renewed surge in central-level interest (at least in official rhetoric) on the DSR. In a keynote speech at the 2024 Digital Silk Road Development Forum held in Xinjiang, Wang Yong, Vice-chairman of the Chinese People's Political Consultative Conference (CPPCC), stated that China seeks "closer technological collaboration with Belt and Road Initiative nations on artificial intelligence, cloud computing, big data, blockchain, and quantum computing.[86]" Following this, in May 2025, the PRC announced

its AI capacity-building initiative, AI For Good and For All, which focuses primarily on countries in the Global South.[87]

China's ambitions were also highlighted at the World AI Conference in August 2025, a flagship conference sponsored by several Chinese government organizations. During the conference, Premier Li Qiang proposed creating a World Artificial Intelligence Cooperation Organization (WAICO) headquartered in Shanghai.[88] According to PRC Vice Foreign Minister Ma Zhaoxu, WAICO will "respond to the call of the Global South" for inclusive AI development that respects national sovereignty.[89] At WAICO, China also released the Action Plan for Global Governance of Artificial Intelligence, a 13-point manifesto in support of international AI cooperation.[90] The document explicitly promoted the Global Digital Compact, where China has engaged in significant coalition-building efforts, as the preferred platform for engagement on global AI governance. The pronouncement echoed similar language from the GAIGI, which included the PRC's desire to "promote AI technologies to benefit humanity and contribute to building a community with a shared future for mankind," while emphasizing state sovereignty and mutual benefit.[91] The adoption of rights-oriented language is deliberate. By appropriating this terminology, the PRC seeks to steer normative frameworks away from Western understandings of human rights and toward interpretations aligned with China-centric principles that prioritize state authority.[92]

AI-related DSR projects are a key vehicle for China to bolster its diplomatic priorities, as they serve to reinforce the narratives and coalition-building China engages in with G77 countries. These projects strengthen China's hand in other priority areas, including AI governance. China has limited ability to influence the outcomes of joint agreements in institutions like the Organization for Economic Co-operation and Development (OECD), which the PRC views as Western-dominated. Therefore, spearheading new AI initiatives or seeking to ensure that global AI governance conversations are primarily conducted under the auspices of the UN is a means for China to exert a more significant influence on how global agreements on AI governance are shaped.[93] China is also promoting its AI governance model in other fora, including with BRICS, to undermine Western models of digital governance.[94]

Overall, China has revived the DSR under a renewed focus on "soft connectivity," primarily as a mechanism to enhance its political and economic power in an era of increasing geopolitical competition with Western countries, especially the United States. Its strategy to achieve this goal involves both technical implementation and governance cooperation on AI with countries in the Global South. China's leadership sees an opportunity to gain a potential competitive advantage via the DSR by focusing on "soft connectivity." As one Chinese scholar put it, writing on the opportunity the AI age has brought for China:

> "The material foundation of digital governance primarily refers to new digital infrastructure. It is the source of a country's digital rules, digital security, and digital international voice. Digital infrastructure primarily encompasses information and communication technologies such as 5G, data centers, cloud computing, artificial intelligence, the Internet of Things, [etc.]. Furthermore, traditional infrastructure that has undergone digital transformation…Building upon this foundation, new digital infrastructure can foster [new] digital business models and digital value networks. Consequently, the existence, operational mechanisms, general characteristics, and governance of a country's entire infrastructure will undergo disruptive changes.[95]"

In short, by emphasizing AI governance, capacity-building, and standards-setting, China seeks to convert material digital infrastructure into long-term political influence and normative power.

The scope and evolution of the DSR, however, only partially explain its real-world impact. Whether and how these ambitions are realized ultimately hinges on financing: who provides capital, on what terms, and for which types of projects. The structure of DSR financing thus shapes not only the scale of China's digital footprint abroad, but also the form that AI-related cooperation ultimately takes.

Funding the DSR

Funding for DSR projects is primarily provided by Chinese policy banks and large commercial banks through a range of channels (e.g., loans, export buyer's credits, supplier credits, and project finance).[96] Because AI-related deployments are often embedded within larger "digital infrastructure" or "smart city" packages, it is difficult to quantify standalone Chinese financing for AI as a discrete category.[97] In terms of development financing more broadly, China is one of the top providers globally. According to AidData, between 2000 and 2021, China provided over $1.5 trillion USD for nearly 18,000 overseas development projects, translating to about $68 billion USD per year on average.[98] Other estimates put the annual average closer to $85 billion USD.[99] However, it is important to note that a huge portion of this aid, around 85 percent, is issued as debt.[100]

Estimating the DSR's specific scale is especially challenging. One reason is definitional: "Digital Silk Road" is used inconsistently across sources, sometimes referring only to countries that have signed explicit DSR cooperation documents, and other times including any country that has received (directly or indirectly) digital infrastructure investment, smart city systems, or telecommunications equipment linked to the BRI. There is even some level of uncertainty about the number of signatories. For example, Chinese official reporting around the BRI highlighted the creation of bilateral "Silk Road e-commerce" cooperation arrangements, though public lists of DSR signatories remain incomplete and unevenly reported across regions and years.[101] Another reason estimation is difficult is due to signaling: firms and officials may emphasize "DSR" branding domestically while downplaying it in host countries if the label is politically sensitive.[102] In addition, due to the nebulousness of the concept of the DSR, sources diverge in terms of what is counted as a DSR or digital-related China investment, depending on the methodologies used and the defined scope.[103]

As a result, sources diverge on both (a) how many countries "participate" and (b) what counts as a DSR project. At the upper end, some analyses suggest that roughly one-third of BRI participants have some form of DSR-related cooperation, while narrower approaches count only formal DSR Memoranda of Understanding (MOUs) or "digital economy cooperation" mechanisms.[104] For example, Chinese official reporting around the BRI has highlighted the creation of bilateral "Silk Road e-commerce" cooperation arrangements, though public lists of DSR signatories remain incomplete and unevenly reported across regions and years.[105]

On the higher end, some studies have suggested that around one-third of countries participating in the BRI (approximately 140) have some form of cooperation on DSR projects.[106] The number of countries with MOUs on DSR cooperation is much smaller. At the beginning of 2024, China had reportedly signed a DSR cooperation memorandum of understanding with seventeen countries and established bilateral Silk Road e-commerce cooperation mechanisms with thirty countries.[107] According to reports from the Digital Silk Road Development Forum at the 2025 World Internet Conference, China's digital economy cooperation with countries participating in the BRI continues to deepen, particularly in areas such as digital trade, AI, and smart logistics, but the specific newly added signatory countries have not been publicly listed.[108]

Despite these obstacles in DSR assessment, at a high level, China's DSR financing model can be said to exhibit three recurring features:

- **State-led Financing Dominates:** The Export-Import Bank of China (China Exim Bank) and China Development Bank (CDB) are frequently central lenders in BRI/DSR-linked deals, while state-backed vehicles (e.g., the Silk Road Fund) can participate through equity or blended structures.[109] A 2024 report from the World Trade Organization found that by the end of 2022, the PRC Exim bank's BRI-related loan balance reached $341.6 billion USD, covering more than 130 countries.[110] According to China's Green Finance Development Center, total expenditure under the BRI amounted to $1.05 trillion USD by end 2023, up from $640 billion USD in 2021.[111]

- **Massive Scale but Data Opaque:** Across the BRI/DSR ecosystem, public reporting often mixes commitments with disbursements and bundles state-backed finance with commercial activity. Additionally, funds are not only used for direct aid but also frequently support host governments or enterprises in purchasing technologies and equipment from Chinese companies through preferential buyer's credit, project financing, and similar mechanisms.[112] In this environment, exact figures are difficult to pin down. AidData estimates that by 2021, China had committed or financed over $74 billion USD in DSR projects (including but not limited to AI-related ones). These funds primarily support foundational infrastructure, such as data centers, fiber-optic networks, and 5G base stations, creating platforms for AI applications.[113]
- **Coordinated Overseas Expansion of Enterprises and Capital:** Major Chinese technology suppliers (e.g., Huawei, ZTE, and cloud providers) often benefit from state-backed credit that reduces financing costs and strengthens bids abroad, including through export credits and buyer's credits that support host country procurement of Chinese equipment and services.[114]

China's broader BRI financing architecture also matters for understanding how DSR projects get capitalized. Beijing established the Silk Road Fund and helped create the Asian Infrastructure Investment Bank (AIIB), which can support connectivity-relevant projects even when they are not explicitly branded as "DSR." The AIIB is a development-oriented multilateral financing institution that focuses on lending; the Silk Road Fund is a medium- and long-term investment institution that focuses on direct equity investment.[115] According to PRC reporting, as of September 2025, Silk Road Fund committed almost $27 billion USD in investments in more than seventy countries and regions.[116] Meanwhile, as of February 2025, the Asian Infrastructure Investment Bank, approved 364 investment projects totaling $70 billion USD.[117] These projects span areas such as transportation, energy, and public health, providing investment and financing support for the joint development of national infrastructure connectivity and sustainable economic and social development.[118]

The PRC has also created several regional and sectoral cooperation funds for DSR projects—spanning Eurasia, Latin America, Central and Eastern Europe, ASEAN, and Africa—and policy banks have created dedicated BRI lending programs.[119] The China Development Bank and the Export-Import Bank of China have each established special Belt and Road loan programs, pooling resources to increase financing support for the BRI. By the end of 2022, the China Development Bank had directly provided financial services to over 1,300 Belt and Road projects, and the Export-Import Bank of China's Belt and Road loan balance reached 2.2 trillion yuan ($309 billion USD), covering over 130 participating countries. The PRC government reports that the loan projects have stimulated around $400 billion USD in investment and over $2 trillion USD in trade.[120]

Because reporting conventions vary (commitment vs. disbursement; state vs. private; announced vs. executed), the literature contains a wide spread of headline estimates regarding China's investment in digital projects in the Global South. As such, these figures should be treated as directional indicators rather than a coherent single total. Available estimates specifically concerning the DSR component of the BRI include, for example, $200 billion USD in pledged investments by 2018, $17 billion USD invested in completed projects from 2013-2019, $70 billion USD committed to Africa for BRI projects in 2019, $8 billion USD committed to the African continent specifically for DSR projects in 2021.[121]

For AI exports specifically, RAND and AidData tracked Chinese government-supported development finance projects that "utilized or enabled Artificial Intelligence (AI) technology" in the Global South between 2000 and 2017. The dataset captured 155 projects for AI applications or infrastructure across sixty-five low- and middle-income countries, funded by Chinese official sector institutions and the military, worth $4.5 billion.[122] All things considered, it is reasonable to characterize China's cumulative investment in BRI-linked "digital economy" activity (digital infrastructure, e-commerce, smart cities, and related systems) as reaching into the hundreds of billions of dollars. However, this is with the qualification that this is an inference drawn from multiple non-comparable estimates, and not a single reconciled accounting.[123]

More important than the exact aggregate figure is what the financing model does: state-backed lending and export credit can substantially reduce the near-term fiscal burden on recipient governments seeking to build telecommunications networks, data centers, and related digital infrastructure in a way that competing Western financing models do not.[124] Comparative estimates underscore the broader asymmetry in infrastructure finance: a 2024 US Government Accountability Office report finds that from 2013 to 2021 the PRC provided $679 billion USD for infrastructure projects through the BRI in five key sectors, compared to $76 billion USD provided by the United States in the same sectors.[125] Such support is typically provided with few strings attached, as state-owned policy banks often provide loans without requirements for economic restructuring or political reform. Moreover, China's integrated "deal team packages," which bundle comprehensive digital infrastructure solutions (described in greater detail below), often prove especially attractive to local government officials.[126]

This financing approach does not exist in a vacuum—it is designed to advance the PRC's strategic objectives.[127] Researchers find that PRC financing models can carry political effects even when they are framed as commercially oriented. In "Hidden Strings Attached? Chinese (Commercially Oriented) Foreign Aid and International Political Alignment," Damian Raess, Wanlin Ren, and Patrick Wagner report that recipients of higher levels of China's "Other Official Finance" (OOF) exhibit closer UN General Assembly voting alignment with China, and that the relationship is especially pronounced among democracies in their analysis.[128] In particular, democratic leaders can claim visible, high-profile OOF projects—such as Ghana's Bui Hydropower Station or Sri Lanka's Hambantota Port—for political credit, incentivizing cooperation.[129]

Similarly, research on borrowing decisions in Latin America finds associations between domestic political orientation, baseline alignment with the United States, and propensity to seek Chinese financing. One 2025 study found that countries governed by left-leaning parties in Latin America demonstrate a greater propensity to secure financing from China for individual projects. This pattern was particularly evident during the decade of President Rafael Correa's administration in Ecuador, when the government obtained more than $10 billion USD through twenty-one separate loan agreements. At the international level, states whose foreign policy positions diverge from those of the United States—measured through voting behavior in the UN—are more inclined to borrow from China. Moreover, as China's relative power vis-à-vis the United States has increased, Latin American countries have become progressively more likely to seek Chinese financing for comparable projects.[130]

Recent work has also examined the effect of BRI investment on public opinion in host countries.[131] In one of the first comprehensive analyses of the soft-power effects of foreign aid via public opinion, a 2025 study finds that Chinese development finance functions as a tool of soft power by enhancing public approval of the Chinese government in many recipient countries—especially when projects are large, generous, well-publicized, and located in strategically important states. But the effect is not uniform: it is concentrated in select "high-value" countries—this includes African countries generally, "swing states" in the United Nations General Assembly (i.e. states that are neither firmly in the Western nor Chinese camp, but tend to switch sides), and countries with higher baseline public support for the Chinese government. The researchers estimate that Beijing's project portfolio increases public approval of the Chinese government by more than 2.2 percentage points per year on average in the contexts they examine.[132]

Finally, this financing approach advances the PRC's broader standardization strategy. Beijing will initiate agreements under the auspices of the BRI that bind financing for major infrastructure projects, like railways, to the adoption of China's technical standards.[133] As of 2025, Beijing has reportedly concluded 108 such agreements with sixty-five national, regional, and institutional partners.[134]

The PRC's financing approach reinforces the strategic political and economic value of the DSR. Even when projects are negotiated bilaterally and implemented unevenly, the combined effect can be to entrench

Chinese technology ecosystems, lower adoption barriers for "China-standard" solutions, and expand Beijing's influence by allowing it to reinforce China's diplomatic narrative of partnership, capacity-building, and shared modernization outside Western-led governance structures.

However, the strategic effects of the DSR's financing model are ultimately mediated through firms. Chinese technology companies occupy a critical intermediary position, operating at the intersection of state financing, host-country demand, and commercial competition. Examining the role of firms is therefore essential to understanding how DSR objectives are operationalized, adapted, or reshaped on the ground.

The role of firms in the DSR

In addition to the state's role, Chinese firms are central to DSR-related activity. Their presence in Global South markets has expanded markedly over the past decade, and the DSR functions as a practical market-access and branding framework for firms competing in sectors such as cloud services, smart cities, mobile payments, and AI-enabled applications.[135]

Firm behavior under the DSR can be understood across four dimensions: the sectoral footprint of Chinese companies overseas; the pricing and deal-making strategies that facilitate market entry; the deployment of integrated "stack" solutions that create technical lock-in; and participation in standards-setting efforts that reinforce long-term adoption.

Sectoral footprint: where Chinese firms operate

Beijing and PRC-headquartered firms are often able to market their domestic "digital transformation" experience as transferable to host countries in the Global South, particularly those related to digitalization projects in China's rural areas.[136] PRC firms offer cost-competitive end-to-end packages ("Chinese solutions") that appeal to governments seeking rapid digitization. These offerings tend to concentrate in several commercially and politically salient sectors.

- **Smart cities/Safe Cities:** China's "Safe City" model is widely promoted, encompassing exports of AI-driven surveillance cameras, facial recognition systems, and predictive policing software. For instance, Huawei claims it has provided Safe City solutions to "over 700 cities across over 100 countries and regions, including Brazil, Mexico, Serbia, Singapore, Spain, South Africa, and Turkey.[137]"
- **E-governance and Digital Public Infrastructure (DPI):** Firms support national and municipal efforts to digitize public services, including digital identity systems, citizen-facing platforms, and analytics layers, which is positioned as improving administrative efficiency and state capacity.[138]
- **Cloud computing and big data:** Major providers such as Alibaba Cloud and Tencent Cloud have expanded overseas data centers and cloud "regions," enabling local access to compute, storage, and (increasingly) AI services. Alibaba Cloud, for example, has publicly outlined plans to expand cloud regions and data centers in markets including Malaysia, the Philippines, Thailand, South Korea, and Mexico.[139]
- **Healthcare:** Post-pandemic, AI-assisted diagnosis and "smart public health" systems have been promoted as areas of cooperation, though documentation varies substantially by country and vendor.[140] For instance, Chinese AI medical imaging companies have provided technical support to Indonesia, India, and other nations.[141]
- **Agriculture and environmental protection:** In parts of Africa and Latin America, firms promote remote-sensing, monitoring, and "smart irrigation" solutions framed around food security and climate resilience.[142]

Pricing, financing, and deal-making: how firms secure market access

Across these sectors, pricing is a major competitive lever. In Southeast Asia, for example, Chinese cloud services are commonly listed 20–40 percent below US providers across multiple product lines.[143] Several factors help enable this discounting: for one, state-linked financing and export credit can reduce capital costs. Huawei, for example, benefits from tens of billions of dollars in state support through grants, concessional credit, tax incentives, and related subsidies. Firms can also cross-subsidize from other business lines; meanwhile, intense domestic competition pushes price wars, depressing costs even further.[144]

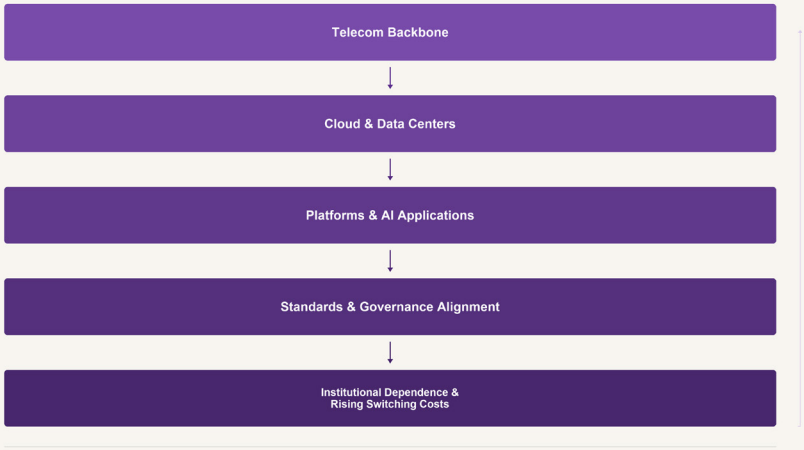
Beyond pricing, firm-led investment and deal-making further anchor Chinese companies in overseas markets. Chinese technology firms such as ZTE, SenseTime, and Huawei have invested and financed hundreds of millions of dollars in digital infrastructure projects worldwide. Examples include a $207 million USD collaboration between SenseTime and Saudi Arabia's sovereign wealth fund to build out an AI ecosystem in the kingdom; ZTE has signed multiple agreements and Memoranda of Understanding (MOUs) worth tens of millions of dollars with various parts of the Thai government to support its AI upgrading, including a recent agreement to build out an AI-cloud-data center; in November 2024, Huawei signed a smart city MOU with the Bangladeshi government's Information and Communications Technology Division to provide technical support for smart transportation, AI surveillance, and cloud computing.[145]

Integrated deployment and the 'Chinese tech stack'

China's commercial practices are best understood as part of an integrated deployment strategy. Rather than exporting isolated products, Chinese firms increasingly offer bundled ecosystems—sometimes described as a "Chinese tech stack." This stack spans infrastructural layers (telecommunications networks, cloud and data centers, and platform services such as smart city systems or e-commerce platforms) as well as governance layers (standards, compliance tooling, and policy templates).[146] The strategic logic is cumulative: adoption at one layer increases the incentives to adopt adjacent layers for reasons of interoperability, procurement convenience, and operational continuity. Over time, this raises switching costs and creates a form of technical lock-in that can disadvantage competitors.[147]

Figure 1:
Cumulative lock-in in the Chinese tech stack

The Chinese tech stack operates as a reinforcing system. Adoption at one layer increases the incentive to adopt adjacent layers, producing interoperability advantages, procurement convenience, technical lock-in, and political and institutional influence. This raises switching costs and creates institutional dependence over time.



This stack logic is reinforced through coordinated dealmaking. PRC overseas projects are often structured through collaboration among firms, national financing institutions, and quasi-state organizations to ensure that contracts, financing, and implementation move in tandem. Overseas Chinese chambers of commerce are emerging as players in digital trade matchmaking, connecting Chinese firms with foreign buyers, suppliers, and regulators while reducing information asymmetries. For example, chambers facilitate BRI trade promotion events and facilitate signing of cooperation agreements establishing economic and trade alliances.[148] Their embeddedness in host-country commercial ecosystems allows them to support platform onboarding, partner identification, and dispute resolution in digital transactions. By organizing exchanges and liaising with host governments, chambers lower entry barriers for Chinese enterprises while reducing political and commercial uncertainty for local partners.[149] Because these organizations operate as civilian industry associations rather than formal state bodies, they can also advance cooperation while avoiding perception of geopolitical intent.[150]

The same stack logic extends beyond backbone infrastructure to edge deployment and consumer technologies. Firms such as Huawei and Xiaomi integrate AI capabilities into mass-market smartphones and connected devices, broadening AI access in lower-income markets.[151] Chinese AI ecosystems are often optimized for efficient deployment under resource constraints.[152] Studies show that for many inference use cases, models can run on lower-tier hardware such as Huawei's Ascend chips (even if those chips lag the

frontier), enabling competitive deployments in markets where top-tier computing is scarce or expensive.[153]

These technical deployments intersect with growing demand for localized and sovereignty-conscious solutions.[154] Governments across the Global South increasingly require domestic data center construction and locally calibrated AI models in order to retain control over data governance and digital ecosystems.[155]

China's embrace of open-source AI development further reinforces this model. Systems from DeepSeek and Alibaba compete directly with leading US models on performance while operating at a significantly lower cost.[156] As China's overseas footprint expands, data and revenue streams flow back to domestic firms, reinforcing their ability to invest in continued technological advancement.[157] At the same time, partner countries increasingly rely on Chinese AI products for governance and service delivery, creating feedback loops in which Chinese cloud infrastructure, software, and AI models become embedded in local administrative ecosystems.[158]

Alignment with national strategies and cloud expansion

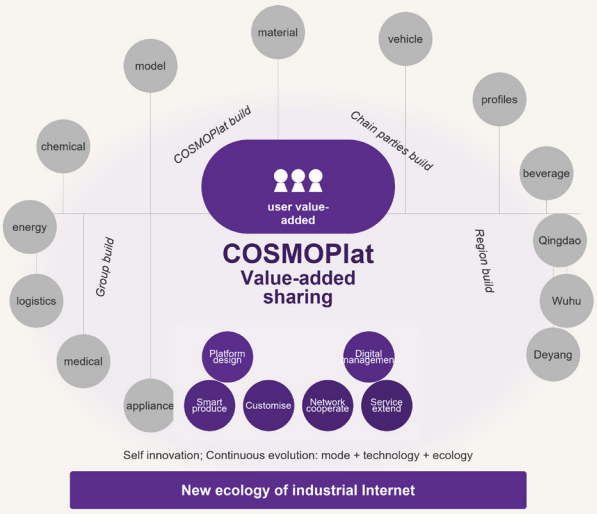
Firm-level strategies also align closely with the PRC's stated DSR objectives. A core element of Beijing's approach is aligning Digital Silk Road projects with host countries' national digital strategies, many of which prioritize the modernization of public services.[159] To meet this demand, PRC firms are developing integrated cloud/AI/blockchain offerings, summarized in industry parlance as "cloud computing as the base, AI as the driver, blockchain to ensure trusted interaction.[160]" Haier's COSMOPlat offers a useful illustration of how Chinese industrial internet platforms are structured and scaled to support this approach. The platform is built in layers, with basic cloud infrastructure at the bottom, shared software and AI capabilities in the middle, and customizable industrial applications on top. This modular design allows firms to mix and match functions quickly to meet specific production needs. COSMOPlat now supports hundreds of millions of users and tens of thousands of enterprises, with its tools deployed across more than one hundred factories worldwide.[161]

Cloud expansion is central to this strategy. Alibaba Cloud and Huawei Cloud are accelerating overseas data center construction in markets such as Malaysia, Mexico, the Philippines, and Thailand.[162] In Latin America, Chinese providers account for 25 percent of data center ownership in Brazil, 40 percent in Chile, and near complete market share (100 percent) in Argentina, Mexico, and Peru. A similar pattern emerges in Asia, where Chinese firms control 55 percent of cloud clusters in Singapore, 57 percent in Indonesia, and the entirety of the market in Thailand, the Philippines, and Malaysia. Comparable dominance is also observed in Saudi Arabia and Turkey. Globally, US companies own approximately 70 percent of cloud computing infrastructure, while Chinese firms command nearly all the remaining 30 percent.[163]

Alibaba Cloud has also launched the international version of its large language model (LLM) service platform, Bailian, offering what it describes as "one-stop, fully managed services" for LLM customization and deployment.[164] The platform provides API access to Alibaba's Tongyi Qianwen 2.5 base model.[165] In Saudi Arabia, Alibaba partnered with Saudi Telecom Company (STC) to establish the Saudi Cloud Computing Company in Riyadh. Alibaba licenses core technology while STC holds a 55 percent stake and leads operations. This allows the company to export its technology while appeasing host-country demands for sovereign control.[166] In addition, Alibaba's Qwen3 models reportedly support 119 languages and dialects—including Bengali, Burmese, and Urdu, which are often absent from global AI training datasets.[167] By contrast, Meta's open-source Llama4 model covers only twelve languages.[168] This disparity is significant in how vendors market localization to Global South governments. These initiatives collectively create a durable infrastructure base for the global deployment of Chinese AI applications.

Figure 2:
Haier COSMOPlat Platform Architecture

Haier's COSMOPlat industrial internet platform illustrates the modular, vertically integrated approach that characterizes Chinese tech stack deployments. Adapted from Jin Chen, "COSMOPlat: A Leading Industry Internet with Advanced Management Model," Global Focus: The EFMD Business Magazine, September 14, 2022.



Taken together, the Chinese tech stack links infrastructure, platforms, and governance tools in ways that embed Chinese systems deeply within partner countries' digital ecosystems. Because these deployments are structured to accommodate sovereignty-sensitive demands, including local data control and language localization, they align closely with the political priorities of many Global South governments. Over time, this technical alignment translates into institutional and political influence, as continued compatibility with Chinese systems shapes procurement choices, governance practices, and regulatory trajectories.

Standards-setting and technological lock-in

Standards-setting further entrenches the Chinese integrated "stack." Chinese firms are active in standards-setting efforts intended to support interoperability and, over time, deepen adoption of "China-standard" systems.[169] For example, Chinese firms such as Huawei play a significant role in setting technology standards for 5G and participating in mobile infrastructure roll-outs in many BRI countries.[170] This strategy is explicitly outlined in China's 2021 "National Standardization Development Framework," which sets the goal of having China's domestic standards become de facto international standards in high-tech, prioritized fields.[171] Similar language appears in later official documents, including its 2024 "Guidelines for the Construction of a Comprehensive Standardization System for the National Artificial Intelligence Industry," which highlighted the "internationalization of Chinese standards" as a core goal.[172]

China's 2025 Global AI Governance Action Plan (GAIGI) specifically highlights the importance of building international consensus around standards and norms, and points to international standards bodies as key venues for this work. It highlights the International Telecommunications Union (ITU), the International Organization for Standardization (ISO), and the International Electrotechnical Commission (IEC) as the core bodies through which this dialogue should take place.[173] It also specifically referenced the need to develop a "unified computing power standards system and standards for AI" with regard to support for developing countries in the Global South in their digital infrastructure development.[174] For example, SenseTime continuously promotes global AI governance, participates in over eighty important domestic and international standards organizations, holds multiple expert seats in key ISO standards, represents Chinese AI enterprises in international standard-setting, and has led the drafting of over 200 international, national, and other standards covering foundational technologies like AI, facial recognition, computer vision, and application fields like security and smart cities.[175]

Similarly, a 2024 interim progress report from China's State Administration for Market Regulation (SAMR) stated that China intends to "expand exchanges on standardization with more countries and promote the integration of standardization efforts to jointly advance the 'Belt and Road.[176]" In 2017, it concluded eighty-one bilateral standards agreements with forty-seven countries aimed at facilitating trade and lowering technical barriers. By the end of 2023, this network had expanded to 108 bilateral and multilateral cooperation agreements with sixty-five national and regional standardization bodies and international organizations, including fifty-seven agreements with the forty-seven member states of the BRI.[177]

These standards efforts feed back into the same lock-in dynamics observed at the infrastructure level.[178] As scholars have argued, AI is "fundamentally built on top of ICT technologies.[179]" Companies like Huawei have responded to the demand for high-bandwidth, low-latency ICT networks capable of deploying locally-tailored AI solutions by providing "AI-in-a-box" solutions that work on top of its existing infrastructure.[180] Once in place, such infrastructure will be difficult to replace, particularly if China couples data center construction with mandates to adopt Chinese technical standards, thereby creating interoperability barriers for foreign competitors.[181]

These standards efforts reinforce the "stack" dynamic: when Chinese firms deploy integrated solutions (e.g., telecom infrastructure, with cloud support, and AI applications) and shape interoperability standards, replacement becomes more complex and costly—especially if governments and operators calibrate downstream systems to Chinese technical specifications.

In sum, the role of Chinese firms within the DSR illustrates how commercial activity operationalizes state strategy. Pricing advantages bundled infrastructure and service offerings, and active participation in standards-setting enable firms to translate vague, high-level policy direction into durable market presence. These dynamics help explain why DSR projects often create technical and institutional dependence over time.

The following section examines the systemic vulnerabilities and constraints within this model, highlighting where alternative partnership approaches can gain traction.

The supporting ecosystem for the DSR: PRC influence in global AI governance

The success of the DSR in large part hinges on China's ability to influence norms, outcomes, and engagements in global AI governance fora. This influence is established through recurring alignment among key partner states and coalitions, reinforced through development cooperation, infrastructure provision, and sustained diplomatic engagement. This alignment is most visible in UN–centered processes and South–South groupings, where Beijing has invested heavily in agenda-setting, coalition-building, and diffusion of PRC-defined norms related to AI capacity-building, sovereignty, and multilateralism.

Key partners

Several countries demonstrate consistent and strong alignment with the PRC across multiple international fora on AI-related issues. Saudi Arabia, Ethiopia, Nigeria, Vietnam, Serbia, and Cuba frequently support Chinese positions in UN debates, co-sponsor or endorse Chinese-led resolutions, and echo Beijing's framing of AI governance as a development and sovereignty issue rather than a primarily rights-based regulatory challenge. These countries tend to benefit directly from DSR–linked cooperation, including smart city deployments, cloud infrastructure, and AI-enabled public services, which in turn reinforces receptivity to China's governance narratives. Rather than being ideologically motivated, their alignment is based on pragmatism, and is rooted in infrastructure dependence, capacity gaps, and the appeal of China's development-first framing.

Multilateral organizations and groupings

Beyond individual countries, China has been particularly effective in leveraging large, flexible coalitions that amplify its influence without requiring formal consensus. The BRICS grouping—now expanded to include Egypt, Ethiopia, Iran, and the United Arab Emirates alongside Brazil, Russia, India, China, and South Africa—has emerged as a key platform for advancing a shared emphasis on UN-led AI governance and the primacy of developing country interests. The 2025 Rio Declaration explicitly framed AI as a driver of inclusive growth and called for global AI regulation under UN auspices, language that closely mirrors Chinese diplomatic messaging.[182] While BRICS members do not always align with China on other geopolitical issues, AI governance has become a relatively low-cost domain for consensus-building, particularly around opposition to "exclusive" or club-based governance models.

The G77 plus China grouping plays a similar, if more diffuse, role within UN processes. Although the coalition rarely produces standalone AI governance texts, joint statements in the General Assembly and UN committees routinely emphasize capacity-building, technology transfer, and equitable access to AI—priorities long championed by Beijing. China's practice of speaking "with" the G77 rather than merely "to" it allows Chinese preferences to be embedded in broader developing-country positions, giving them greater legitimacy and insulation from accusations of unilateralism.[183] For policymakers in democratic countries, this dynamic underscores the importance of engaging the G77 as a heterogeneous coalition rather than assuming uniform alignment with China.

UN bodies

United Nations bodies themselves are a central arena where Chinese influence is exercised through agenda-setting and expert participation. In July 2024, the UN General Assembly unanimously adopted a Chinese-initiated resolution on international cooperation in AI capacity-building, reflecting Beijing's success in framing AI governance as a development issue with universal appeal.[184] Chinese experts have also become increasingly visible in technical and advisory bodies, including the UN Secretary-General's High-Level Advisory Body on AI, where they contribute to frameworks such as Governing AI for Humanity and interface with parallel standard-setting processes at the International Standards Organization (ISO) and International Electrotechnical Commission (IEC).[185] The PRC established the UN Group of Friends for International Cooperation on AI Capacity-building with Zambia in 2024; the group aligns on prioritizing AI for development, safe and controllable AI, and multilateralism in governance processes.[186] Members include Algeria, Burundi, Cambodia, China, the Democratic Republic of Congo, Cuba, Dominica, Egypt, Equatorial Guinea, Eritrea, Gabon, Indonesia, Iran, Iraq, Kazakhstan, Laos, Liberia, Nicaragua, Nigeria, Pakistan, Qatar, Sierra Leone, Syria, Uganda, Tanzania, Venezuela, Zambia, and Zimbabwe.

UNESCO and related declaration-based processes further illustrate how China operates in platforms it helps shape. UNESCO's 2021 Recommendation on the Ethics of Artificial Intelligence emphasizes fairness, inclusivity, and shared benefit—principles that align with China's discourse on global digital governance. Chinese experts participated in the drafting process, and UNESCO's Beijing office has actively supported regional outreach and implementation efforts in Asia.[187] While UNESCO remains a pluralistic institution with strong civil society engagement, China's sustained presence allows it to reinforce interpretations of AI ethics that prioritize state responsibility and development outcomes over individual rights enforcement.[188]

Other fora

China has also demonstrated tactical flexibility in participating in plurilateral initiatives that originate outside its immediate diplomatic orbit. The PRC signed the Bletchley Declaration at the 2023 AI Safety Summit, and both led and affirmed Global South participation at the 2025 Paris AI Action Summit.[189] [190] These moves should be understood as efforts to ensure Chinese participation in all major AI governance conversations, preventing exclusion and preserving influence.

Taken together, these patterns suggest that China's strength in global AI governance in large part lies in its ability to align development narratives, infrastructure partnerships, and diplomatic coalitions in key fora. For like-minded and democratic countries, the strategic challenge is not to "counter" China in each forum, but to recognize where alignment is strongest, where it is contingent, and where alternative engagement strategies could resonate with the same partners.

At the same time, China's external coherence in AI diplomacy masks a set of internal structural tensions that complicate the durability of its model. A closer look at these systemic issues highlights limits that shape how far its governance strategy can travel.

Systemic issues and weaknesses of China's approach to AI cooperation under the DSR

China's AI cooperation strategy faces multiple challenges and criticisms, raising questions about its sustainability. These include:

- **Data governance and privacy concerns:** China's exported AI surveillance technologies face accusations of lacking transparency and effective oversight, potentially enabling recipient governments to abuse them and violate citizens' privacy and human rights, sparking local and international concerns.[191] As scholar Bulelani Jili put it when writing about African demand for Chinese technology exports, "While these tools arrive on ostensibly permissible grounds, their acquisition and application come without public consent or robust accountability measures. It is this gap between the adoption of novel digital surveillance technologies and robust regulatory measures that inspires trepidation.[192]"
- **Debt sustainability risks:** Some DSR projects are financed by Chinese loans, potentially increasing fiscal risks for already heavily indebted countries. As a recent example, an AidData report on how China collateralizes its lending shows that debt agreements stipulate that developing countries' commodity export revenues must be funneled into offshore bank accounts–kept beyond both domestic scrutiny and borrower control until repayment is complete. This raises serious concerns regarding fiscal governance and transparency. As the authors of the report stated, "The cash balances in these accounts, mostly located in China and controlled by the lenders, can be very large; in low-income, commodity-exporting countries, they average more than 20 percent of annual public debt service to all external creditors.[193]" If AI projects fail to deliver expected economic benefits, it could lead to repayment difficulties.
- **Technological dependency and the digital divide:** Critics contend that the DSR may foster long-term dependency on China for critical digital infrastructure and technology in host countries, rather than genuinely enhancing their autonomous innovation capabilities. This widens the "digital divide" between nations.[194]
- **Geopolitical backlash and trust deficit:** As China-US tech competition intensifies, China's technology exports are viewed as tools for geopolitical expansion. Some nations are reevaluating or halting collaborations with Chinese tech firms due to concerns over data security and national security (e.g., India's ban on multiple Chinese apps).[195]
- **Localization and adaptability challenges:** Despite tailoring solutions to local technical specifications, Chinese AI solutions sometimes fail to adequately consider local sociocultural contexts, legal environments, and practical needs, leading to suboptimal project outcomes or "cultural incompatibility.[196]" For example, Tanzania's Chinese-financed national broadband backbone expanded connectivity but exposed structural downsides: local firms were largely confined to low-value roles, procurement was tied to Chinese regulations, and limited capacity building left gaps in domestic operation and management. Despite infrastructure gains, the project reinforced technological dependence and constrained meaningful knowledge transfer.[197] Additionally, some Chinese enterprises operating overseas exhibit poor ESG performance, weak cross-cultural communication skills, and inadequate fulfillment of social responsibilities. These shortcomings undermine project sustainability and tarnish the reputation of Chinese technology.[198]

China's support for Global South nations in AI through the DSR is extensive and well-funded. However, it is driven by complex motivations blending development cooperation, commercial interests, and geopolitical strategy, and faces significant challenges in practice regarding data ethics, debt sustainability, and geopolitics. So, what is to be done?

PART II

Engage

From mapping to strategy: why the Digital Silk Road matters for like-minded democracies

The Digital Silk Road is best understood as an ecosystem: a combination of state-backed finance, infrastructure deployment, firm-led technology packages, and standards engagement that together shape how emerging markets and developing countries access, deploy, and govern digital technologies. Through this model, China has been able to move quickly, reduce up-front costs for partner governments, and offer integrated solutions that span connectivity, cloud services, applications, and governance tooling. The result is the gradual embedding of Chinese technologies, standards, and operational dependencies across critical digital systems in much of the Global South.

This model poses a distinct strategic challenge for like-minded democratic countries. The appeal of the DSR is rooted in delivery: speed, financing, and convenience. Chinese offerings often arrive as bundled packages that simplify procurement, lower political transaction costs for local leaders, and promise rapid gains in service delivery, security, or economic modernization. Over time, these packages can generate technical and institutional path dependencies that make diversification more difficult, as interoperability, standards alignment, and long-term maintenance are calibrated around Chinese systems. Beijing has demonstrated a clear understanding that digital infrastructure creates path-dependent relationships: once countries adopt Chinese-built networks, platforms, and governance tools, switching costs rise and long-term technical, financial, and regulatory dependencies deepen. These dependencies, in turn, translate into durable influence over how digital systems are maintained, upgraded, and governed.

At the same time, the DSR is not without weaknesses. Its heavy reliance on debt financing, uneven project quality, opaque governance arrangements, and limited local capacity-building have generated political pushback in some partner countries.[199] Moreover, while China promotes narratives of digital sovereignty and autonomy, its model frequently concentrates technical control in vendor-managed systems, raising questions about long-term resilience, transparency, and genuine local ownership.

Rules of engagement

For like-minded democracies, the strategic task is therefore not to simply "counter" China's digital expansion, nor to ask partners to choose between competing geopolitical camps. Rather, it is to offer a credible, competitive alternative that aligns with partner country priorities while preserving openness, accountability, and interoperability. This requires moving beyond fragmented capacity-building efforts or narrow governance dialogues, toward a more integrated approach that combines delivery with legitimacy. Any alternative strategy should rest on the following principles:

First, speed matters. Many EMDC governments face acute pressure to demonstrate progress on digital service delivery, economic modernization, and public administration reform. Lengthy project cycles, fragmented donor coordination, and rigid procurement rules can undermine even well-designed initiatives. Democratic approaches must therefore prioritize rapid deployment pathways—particularly for pilot projects and early-stage AI applications—without sacrificing transparency or accountability.

Second, financing is central. China's state-backed lending and export credit mechanisms reduce up-front costs and shift risk away from partner governments in the short term. While this model carries long-term risks, it remains highly attractive where alternative financing is scarce or slow. Democratic strategies must address this gap by combining development finance, blended capital, and coordinated donor instruments in ways that make adoption feasible. In particular, leaning into blended finance and developing mechanisms—such as supporting the use of specialized intermediaries—can unlock more private capital, manage risk, and build sustainable infrastructure on democratic terms.[200]

Third, local capacity and ownership are decisive. One of the recurring weaknesses of DSR projects is the limited transfer of technical knowledge and governance capacity, which can leave host governments dependent on external vendors. A democratic alternative should foreground skills development, institutional strengthening, and support for domestic AI ecosystems.

Fourth, interoperability and choice must be treated as strategic assets. China's bundled "tech stack" approach reduces friction in the short term but can limit long-term flexibility. Democratic partnerships should emphasize modular, interoperable systems that allow countries to mix vendors, evolve standards, and retain leverage over their digital futures. Modularity is essential as it allows solutions to be customized according to specific needs across diverse countries, considering factors such as development, economic drivers, consumption patterns, social needs, political values, and legal systems. This is particularly important for AI systems embedded in public-sector infrastructure.

Fifth, dependency awareness must be treated as a core strategic consideration. Digital infrastructure and AI systems create long-term technical, financial, and governance dependencies that shape who controls data, upgrades, standards, and operational decision-making over time. Failing to account for these dynamics risks well-intentioned support becoming peripheral or inadvertently reinforcing closed, vendor-dependent ecosystems. Democracies should explicitly assess how dependencies are created, mitigated, or transferred, and design interventions that preserve partner autonomy, reduce lock-in, and align immediate delivery with long-term digital resilience and sovereignty.

Finally, legitimacy underpins sustainability. While China frames its model as respecting sovereignty, concerns around transparency, data governance, and accountability increasingly shape public and elite perceptions in partner countries. Democratic strategies that align delivery with inclusive governance—without imposing external models—can build trust over time, particularly when they are co-designed with local stakeholders.

The sections that follow translate the analysis of China's DSR model into concrete strategic implications and design requirements for democratic partnerships on AI. They outline how like-minded countries can compete effectively by closing delivery gaps, reducing dependency risks, and building durable coalitions around shared principles for AI development and governance.

A strategy for like-minded democracies: partnering with eMDCs on AI in the context of geopolitical competition

For like-minded democratic countries, effective partnership with emerging markets and developing countries on AI—especially in the context of geopolitical competition—demands a coherent strategy that can deliver tangible benefits, support partner agency, and shape the institutional environments in which AI is governed. The recommendations outline how partner countries can move from fragmented engagement toward a more integrated partnership model—one that is competitive with China's DSR in practice, while remaining distinct in its emphasis on choice, accountability, and long-term sustainability.

Organizations and fora for engagement and coordination

For like-minded and democratic countries seeking to engage the Global South on AI governance, the choice of institutional venues is as consequential as the substance of policy proposals. Different international organizations offer varying degrees of legitimacy, technical depth, inclusiveness, and susceptibility to strategic influence. An effective engagement strategy requires prioritizing fora where democratic actors can come to ground on shared principles, messaging, and priorities, and that can credibly convene partners, while exercising caution and ensuring tight alignment on strategy among like-minded partners in arenas where agenda-setting dynamics increasingly favor state-centric or opaque governance models.

Several organizations are particularly well positioned to convene like-minded partners. **The Organization for Economic Co-operation and Development (OECD)** remains a central node for AI policy coordination among high-trust democracies, having issued the first intergovernmental AI principles in 2019 and hosting the OECD AI Policy Observatory.[201] While historically perceived by some emerging markets and developing countries as a "Western club," the OECD's growing collaboration with non-members and its role in global transparency initiatives provide opportunities to engage developing countries on technical and regulatory issues without overt geopolitical signaling.[202]

- **The Global Partnership on AI (GPAI)** occupies a complementary space, focusing on applied AI governance and implementation challenges. With members such as India, Brazil, and Senegal, GPAI offers a credible platform for North–South collaboration on AI for development, public services, and crisis response. Its project-based structure and emphasis on practical outcomes make it particularly attractive to policymakers seeking to demonstrate tangible benefits.[203]
- **UNESCO** plays a distinct but equally important role. As the first body to issue a global AI ethics recommendation, UNESCO commands broad trust across Africa, Latin America, and parts of Asia. Although less technical than other fora, its normative reach and strong Global South engagement make it a valuable venue for shaping shared expectations around fairness, inclusion, and responsible AI use. F[204]or democratic countries, UNESCO offers an opportunity to reinforce rights-respecting interpretations of AI ethics while remaining attentive to development priorities.
- **The European Union Commission** also serves as a critical partner in norm-setting and legal frameworks.[205] The EU's AI Act, digital diplomacy efforts, and human-centric AI framework position it as a normative power and key partner for jointly engaging third parties, particularly on standards alignment.[206]

Meanwhile, the **Council of Europe's** Framework Convention on Artificial Intelligence provides the first binding international legal instrument linking AI to human rights, democracy, and the rule of law.[207] Signed by Canada, the United States, EU, the United Kingdom, Japan, and others, the mechanism offers high legal credibility and norm-shaping potential. Although membership is limited, these frameworks can inform broader international discussions and bilateral engagements.

Smaller groupings such as **Digital Nations** offer additional value by focusing on AI-enabled public services and digital government. Including governments like Canada, Estonia, the UK, South Korea, and others, the grouping is agile and like-minded, making it a useful forum for like-minded countries to shape collective engagement strategies and come to ground on norm-setting in other venues.[208]

Lastly, the **Hiroshima Process** is a key venue for partner country engagement. Initiated under Japan's G7 presidency, it focuses on frontier models and risks. It includes the Hiroshima AI Process (HAIP) Reporting Framework, which aims to facilitate transparency and comparability of risk mitigation measures and contributes to identifying and disseminating good practices.[209] It also includes the AI Safety Summit outcomes (for example, those that came out of Bletchley in 2023) and includes ongoing expert consultations. Initially started under the auspices of the G7, it has decoupled from its G7 roots and now includes fifty-six member countries (including the EU) from across the globe under its Friends Group, as well as twenty-four partner companies and organizations.[210]

Organizations and fora at risk of strategic capture

By contrast, several international bodies warrant careful, coordinated, and calibrated engagement due to heightened risks of strategic capture or agenda distortion.

The International Telecommunications Union (ITU) has long been a focal point for contestation over internet and AI governance, with China and aligned states advocating for expanded regulatory authority and state-centric standards. China has historically held leadership positions (e.g., Zhao Houlin, who was Secretary-General from 2015-2022).[211] There has been a strong push from China and its allies to shift standard-setting and AI regulation under ITU's remit, which increases the risk of opaque, state-led model promotion.[212]

Similarly, newer UN bodies created under the Global Digital Compact (GDC), such as **the Office for Digital and Emerging Technologies (ODET)**, warrant careful engagement. While aimed at multistakeholderism in new technologies, the UN body (created and mandated under the Office of the UN Secretary General) has faced criticism from member states and especially from civil society actors for being vague, bureaucratic, and susceptible to influence by well-resourced actors, such as China. It also includes heavy Global South representation, where China is actively lobbying.[213]

Likewise, **the UN Committee on Science and Technology for Development (CSTD)**, which is staffed through the United Nations Conference on Trade and Development (UNCTAD), has been increasingly targeted by China to promote narratives of digital sovereignty and infrastructure dependency.[214] The CSTD's Data Governance Working Group could become another venue for China to influence discussions around AI governance, unless like-minded countries engage on this issue.[215]

Other fora—including BRICS-led AI initiatives, the World Intellectual Property Organization (WIPO), and the World Internet Conference in Wuzhen—have been increasingly leveraged by China to advance alternative governance narratives. BRICS (especially via China, Russia, and South Africa) promotes state-centric AI governance, and new outreach to Global South countries on these topics adds risk of soft-power capture.

In regards to WIPO, while it is less involved in normative AI governance, intellectual property (IP)-related AI policy discussions are increasingly politicized, and China has pushed AI-related IP norms that reflect its domestic priorities.[216] Meanwhile, the World Internet Conference is a PRC-led platform used to legitimize authoritarian approaches to AI, cyberspace, and data governance.[217] While many Global South countries participate in these fora for pragmatic reasons, democratic policymakers should approach these platforms with an aim of coordinating responses, attendance, and messaging in these fora, taking into account the existing political and narrative dynamics at play.[218]

Recognizing these dynamics is a prerequisite to a broader strategic challenge: how democracies can engage emerging markets and developing countries in ways that remain credible, competitive, and responsive to local priorities.

The strategic remedies outlined below are designed to address these challenges holistically. Rather than attempting to replicate China's model, they seek to close delivery gaps while strengthening legitimacy, preserving partner agency, and avoiding long-term dependency traps. In doing so, they offer a pathway for like-minded democracies to compete effectively—on substance as well as values—in shaping the future of AI in the Global South.

Challenges and opportunities for democracies in engaging Global South partners

Challenges to engagement

1. China's embedded ICT infrastructure

- **Issue:** Many emerging markets and developing countries already rely heavily on Chinese-built digital infrastructure (e.g. Huawei for 5G, smart city platforms, cloud computing).
- **Risk:** These ties create path dependency and limit receptiveness to Western-led AI governance norms due to interoperability, technical integration, or political alignment concerns.
- **Example:** Kenya, Ethiopia, and Pakistan—among others—have adopted Huawei's "Safe City" surveillance systems.

2. Appeal of the 'No-Strings' model

- **Issue:** China offers fast, low-conditionality digital investment and tech transfers, avoiding human rights or data protection requirements.
- **Risk:** This undermines efforts to promote rights-based AI governance, which often occurs in a slower, more bureaucratic, and conditional manner.
- **Example:** DSR investments prioritize infrastructure over values.

3. Limited western capacity and presence in multilateral fora

- **Issue:** China and allies are highly active in UN bodies (e.g. ITU, CSTD), often proposing state-centric, non-transparent models of AI governance.
- **Risk:** Global South countries may view Chinese models as the default or more relevant due to a lack of active alternatives or targeted engagement by democratic partners.
- **Example:** China frequently co-sponsors resolutions with emerging markets and developing countries in the UN General Assembly and Human Rights Council on cyber sovereignty.

4. Perceived hypocrisy or neo-colonialism

- **Issue:** Global North countries risk being seen as imposing norms without acknowledging their own histories of surveillance, AI bias, or extractive data practices.
- **Risk:** EMDCs may interpret AI norms promotion as strategic containment, not genuine partnership.
- **Example:** EU digital conditionalities are sometimes viewed in Africa and Latin America as "digital paternalism."

5. Lack of incentives for Global South countries

- **Issue:** Initiatives from Western countries often lack tangible incentives—financing, capacity-building, or technology sharing—that are essential for buy-in from partner governments.
- **Risk:** Global South countries have urgent development needs that outweigh long-term norm debates without near-term gains.
- **Example:** G7 Infrastructure initiatives like the Partnership for Global Infrastructure and Investment (PGII) remain underfunded compared to the BRI.

6. Fragmented messaging and coordination

- **Issue:** In the current geopolitical landscape—marked by intensifying strategic competition over digital infrastructure, AI governance, and standards-setting—fragmented democratic initiatives risk ceding narrative and normative advantage to China's more centralized, long-term digital development approach. Democratic digital partners often pursue uncoordinated bilateral efforts, which can confuse or dilute impact.
- **Risk:** China offers a more unified, long-term digital development message.
- **Example:** AI development proposals from like-minded countries may compete rather than reinforce each other.

Figure 3: Challenges to Democratic Engagement

Challenge	Issue	Risk
China's embedded ICT infrastructure	Many emerging markets and developing countries already rely heavily on Chinese-built digital infrastructure (e.g. Huawei for 5G, smart city platforms, cloud computing).	These ties create path dependency and limit receptiveness to Western-led AI governance norms due to interoperability, technical integration, or political alignment concerns.
Appeal of the 'no-strings' model	China offers fast, low-conditionality digital investment and tech transfers, avoiding human rights or data protection requirements.	This undermines efforts to promote rights-based AI governance, which often occurs in a slower, more bureaucratic, and conditional manner.
Limited Western capacity in multilateral forums	China and allies are highly active in UN bodies (e.g. ITU, CSTD), often proposing state-centric, non-transparent models of AI governance.	Global South countries may view Chinese models as the default or more relevant due to a lack of active alternatives or targeted engagement by democratic partners.
Perceived hypocrisy or neo-colonialism	Global North countries risk being seen as imposing norms without acknowledging their own histories of surveillance, AI bias, or extractive data practices.	Emerging markets and developing countries may interpret AI norms promotion as strategic containment, not genuine partnership.
Lack of incentives for Global South	Initiatives from Western countries often lack tangible incentives—financing, capacity-building, or technology sharing—that are essential for buy-in from partner governments.	Global South countries have urgent development needs that outweigh long-term norm debates without near-term gains.
Fragmented messaging and coordination	Democratic digital partners often pursue uncoordinated bilateral efforts. Fragmented initiatives risk ceding narrative and normative advantage to China's more centralized, long-term approach.	China offers a more unified, long-term digital development message. AI development proposals from like-minded countries may compete rather than reinforce each other.

Strategic remedies for addressing limitations to democratic engagement

To be credible, democratic engagement on AI must be legible to partner governments as a concrete offer, not merely a set of principles. Rather than replicating China's vertically integrated "tech stack," like-minded democracies should focus on modular partnership packages that can be adapted to local priorities while preserving interoperability and choice.

Crucially, these packages should be offered with clear distinctions from China's approach. They should avoid single-vendor dependency, emphasize open standards and interoperability, and include transparent financing and governance arrangements. Rather than positioning partners as downstream adopters of foreign systems, the democratic offer should foreground co-design, local capacity, and the ability to switch providers over time. This differentiation, both normative and strategic, as it directly addresses concerns about lock-in, sovereignty, and long-term control that many local governments increasingly express.

While geo-strategic competition provides the context for this strategy, it should not be its organizing narrative. For many Global South countries, the primary drivers of AI adoption are domestic: job creation, service delivery, administrative efficiency, language inclusion, and economic modernization. Strategies framed primarily around "countering" China risk misaligning with these priorities and reinforcing perceptions of external pressure.

A more effective approach begins with partner demand. Like-minded democracies should position themselves as collaborators in solving concrete development challenges, offering tools and expertise that strengthen local capabilities rather than substitute for them. Strategic competition enters implicitly, through the quality, reliability, and governance of what is delivered—not through explicit alignment tests or exclusionary language.

This partner-first framing also enhances credibility in international fora. When democratic countries advocate for openness, interoperability, and responsible AI governance, those positions carry greater weight if they are grounded in demonstrated partnership and delivery. Over time, this approach can build coalitions that are resilient precisely because they are not defined by opposition, but by shared interests in agency, flexibility, and long-term digital resilience.

Below are some specific, actionable recommendations that like-minded countries can offer to Global South partners that speak directly to the needs and demands of governments, while emphasizing partner agency and choice.

1. Use strategic communications and narrative framing

- **Recommendation:** Emphasize AI for development, inclusive growth/economic transformation, AI accountability, and data justice—terms that resonate with Global South partners more than "safety" or "democratic values" alone. Engagement from Global South countries is most likely to materialize only if AI is framed as a development issue. Positioning AI within the language and priorities of sustainable development creates an entry point that resonates with existing policy agendas and institutional commitments. Absent a clear linkage to the current sustainable development framework, many countries are unlikely to view AI governance as aligned with their immediate priorities or incentives for participation.[219]
- **Mechanism:** Develop culturally relevant messaging and engage local media, think tanks, and influencers.

- **Example:** Highlight AI projects that boost agricultural resilience, healthcare access, or education in African or Latin American contexts (to note, relevant projects can vary significantly based on the economy and development of the target country. For instance, AI applications in transportation and urban planning may be particularly important in South American nations, whereas in the Caribbean, monitoring and adapting to climate change is a top priority).

2. AI governance and infrastructure packages

- **Recommendation:** Pair governance discussions with offers of infrastructure investment, cloud services, and local AI development tools—without hardware dependency.
- **Mechanism:** Leverage the G7's Partnership for Global Infrastructure and Investment (PGII), Development Finance Institutions (DFI) partnerships (e.g. FinDev Canada, the Development Finance Corporation of the United States, British International Investment), and trusted telecom alternatives.[220]
- **Example:** Offer Global South partners digital public infrastructure (DPI) blueprints, like Estonia's examples in the development and promotion of Digital Public Infrastructure (DPI) and Digital Public Goods (DPG), as open-source alternatives to Chinese systems.[221]

3. Invest in capacity-building and talent

- **Recommendation:** Build long-term relationships by training policymakers, engineers, and researchers from emerging markets and developing countries in responsible AI.
- **Mechanism:** Scale initiatives that focus on AI for development; support regional AI centers (e.g., AI4D Africa), and fund scholarships/exchanges.[222] Technology transfer packages, including workforce upskilling, would be highly valuable to Global South partners.
- **Example:** Create AI governance fellowships for Global South officials and researchers at institutions in Western partner countries.

4. Champion inclusive, localized norms

- **Recommendation:** Frame AI governance in terms of co-creation with Global South stakeholders—especially on fairness, language access, and data rights. This will help to overcome perceptions of governance conversations as Western-imposed frameworks.
- **Mechanism:** Partner with regional bodies (e.g. the African Union, ASEAN, CARICOM, Digital Agenda for Latin America and the Caribbean [eLAC]) to develop regional charters for ethical AI. For organizations that already have charters, using existing frameworks such as the Hiroshima Principles, BRICS and G20 statements, and the outputs from the G20 Task Force on Artificial Intelligence and Data Governance would be helpful references for developing a list of the issues democratic partners are positioned to address.[223]
- **Example:** Support translation and localization of UNESCO's AI ethics guidelines into local norms and languages.[224]

5. Prioritize trusted multilateralism

- **Recommendation:** Strengthen engagement in neutral multilateral fora like UNESCO, GPAI, and OECD, while strategically countering China's influence in contested bodies (e.g. ITU). While some Global South

partners previously may not have seen the OECD as neutral and considered engagement in the organization as "picking sides," the perception of the G20 among developing countries is shifting, largely due to the leadership of Brazil, South Africa, and India, as well as the African Union's inclusion as a permanent participant. W[225]estern countries should emphasize the growing role of emerging countries in the G20 as part of its communications strategy.

- **Mechanism:** Fund secretariats, propose joint resolutions with emerging markets and developing countries, and promote support for the candidacies of representatives from democratic countries. For example, the recently launched Global Dialogue on AI Governance would be a good forum to engage on this front.[226] Other fora have drawbacks. For example, the Hiroshima AI Process is viewed by a number of Global South governments as a space that may not welcome their inputs, while RightsCon is primarily a civil society space and does not draw significant participation from the governments of developing countries.[227]
- **Example:** Ensure leadership in upcoming UN or OECD AI standard-setting fora include Global South co-chairs.

6. Create a branded initiative on digital governance support for the Global South

- **Recommendation:** Launch a branded initiative offering coordinated digital governance support—legal, technical, financial—tailored for the needs of emerging markets and developing countries.
- **Mechanism:** Build a clearinghouse for data protection laws, AI risk audits, and open-source AI tools.
- **Example:** A "Digital Commons Fund" could support civil society and tech innovation in Global South countries to counterbalance China's state-centric model (A note: If the focus is policy alignment, such an initiative should be integrated with existing financial processes and pathways; however, if the focus is direct financing, establishing an independent initiative may be beneficial in ensuring that conditions are adaptable to the needs of developing countries).

For democratic partners to effectively engage the Global South in AI development, they should emphasize building durable partnerships that advance both innovation and governance. This engagement must go beyond transactional exchanges and avoid being framed solely in terms of geopolitical rivalry with China. Instead, such partnerships should aim to foster inclusive growth, promote ethical approaches to AI governance, and help countries leverage AI in pursuit of sustainable development goals. Ultimately, success will depend on articulating a compelling vision for AI that addresses the priorities of developing nations while upholding values conducive to a fair, inclusive, and sustainable AI future.

References

1. Jing Cheng and Jinghan Zeng, "'Digital Silk Road' as a Slogan Instead of a Grand Strategy," Journal of Contemporary China 33, no. 149 (2023): 823-838; Elisa Oreglia and Weidi Zheng, "The Digital Silk Road between National Rhetoric and Provincial Ambitions," The China Quarterly 261 (2025): 183-195.
2. BRICS is a coalition of leading emerging economies—Brazil, Russia, India, China, and South Africa—that has recently expanded to include Iran, Egypt, Ethiopia, Saudi Arabia, the United Arab Emirates, and Indonesia. Together, these countries constitute a sizeable bloc advocating a more multipolar international system, stronger representation for the Global South, and expanded alternatives to Western-led institutions in areas such as trade, finance, and governance. The term initially described the economic growth prospects of the original four members, but over time the grouping has developed into a political platform for economic coordination and for contesting aspects of the existing global order.; The Group of 77 (G77) is the United Nations' largest coalition of developing countries, established on June 15, 1964, to advance shared economic interests and enhance collective negotiating power. Although its membership has expanded to 134 states, it continues to use its original name in recognition of its historical roots.
3. See, for example: "Statement on Behalf of the Group of 77 and China Delivered by H.E. Ambassador Godfrey Kwoba, Deputy Permanent Representative of the Republic of Uganda to the UN, at the Second Committee General Discussion on Agenda Item 18: Sustainable Development," G77, https://www.g77.org/statement/getstatement.php?id=241014.
4. "Factsheet on the G7 Partnership for Global Infrastructure and Investment (PGII)," G7 Development Ministers' Meeting, October 23, 2024, https://www.g7.utoronto.ca/dev/2024-annex-i-gpii.html.
5. Nele Leosk, "Estonian Case – The Development and Promotion of Digital Public Infrastructures," Observer Research Foundation, October 26, 2022, https://www.orfonline.org/expert-speak/development-and-promotion-of-digital-public-infrastructures.
6. "Artificial Intelligence for Development," AI4D, https://www.ai4d.ai/.
7. "Hiroshima Process International Guiding Principles for Organizations Developing Advanced AI Systems," G7 Hiroshima Summit, https://www.mofa.go.jp/files/100573471.pdf.; See: "BRICS Signs AI Governance Declaration: Shaping Global AI Standards Through Multilateral Cooperation," Nemko Digital, August 6, 2025, https://digital.nemko.com/news/brics-ai-governance-declaration-2025.; Konstantinos Komaitis, "The G20 is moving forward on global AI governance—and the US risks being left out," New Atlanticist, December 2, 2025, https://www.atlanticcouncil.org/blogs/new-atlanticist/the-g20-is-moving-forward-on-global-ai-governance-and-the-us-risks-being-left-out/.; "Chairs Statement Task Force on Artificial Intelligence, Data, Governance and Innovation for Sustainable Development," G7G20 Documents Database, https://g7g20-documents.org/database/document/2025-g20-south-africa-sherpa-track-digital-economy-ministers-ministers-language-chairs-statement-task-force-on-artificial-intelligence-data-governance-and-innovation-for-sustainable-development.
8. Currently, UNESCO's recommendations are offered in nine languages: "Recommendation on the Ethics of Artificial Intelligence," UNESCO, September 26, 2024, https://www.unesco.org/en/articles/recommendation-ethics-artificial-intelligence.
9. Alex Vines, "The African Union Becomes a Full Member of the G20," Wilson Center, January 28, 2025, https://www.wilsoncenter.org/article/african-union-becomes-full-member-g20.
10. "Global Dialogue on AI Governance," United Nations, https://www.un.org/global-dialogue-ai-governance/en.
11. "The Hiroshima AI Process: Leading the Global Challenge to Shape Inclusive Governance for Generative AI," Kizuna, February 9, 2024, https://www.japan.go.jp/kizuna/2024/02/hiroshima_ai_process.html.; "RightsCon: The world's leading summit on human rights in the digital age," RightsCon, https://www.rightscon.org/about-and-contact/.
12. Dalia Parete, "Digital Silk Road," China Media Project, November 24, 2023, https://chinamediaproject.org/the_ccp_dictionary/digital-silk-road/.
13. "授权发布:推动共建丝绸之路经济带和21世纪海上丝绸之路的愿景与行动" ("Authorized Release: Vision and Actions on Jointly Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road"), Xinhua, March 28, 2015, https://archive.ph/PIwcc; "《推动共建丝绸之路经济带和21世纪海上丝绸之路的愿景与行动》全文" ("Full text: Vision and actions on jointly building Belt and Road"), China.org.cn, September 15, 2015, https://web.archive.org/web/20250429091023/http:/www.china.org.cn/chinese/2015-09/15/content_36591064.htm.
14. Parete, "Digital Silk Road."
15. "7国共同发起倡议开启"数字丝绸之路"合作新篇章" ("Seven Countries Jointly Opened New Chapter of the Digital Silk Road Cooperation"), Xinhua, December 3, 2017, https://web.archive.org/web/20171210062134/http://news.xinhuanet.com/politics/2017-12/03/c_1122050732.htm; Guo Yiming, "Digital Economy Cooperation to Empower Belt, Road," China.org.cn, December 4, 2017, http://www.china.org.cn/world/2017-12/04/content_50083923.htm.
16. Vivek Chilukuri and Ruby Scanlon, Countering the Digital Silk Road, Center for a New American Security, October 2025, 14, https://www.cnas.org/publications/reports/countering-the-digital-silk-road.
17. David F. Gordon and Meia Nouwens, eds., The Digital Silk Road: China's Technological Rise and the Geopolitics of Cyberspace (Abingdon: Routledge for The International Institute for Strategic Studies, 2022), 18.; This is not to suggest China only began cooperating on digital projects with Global South countries beginning in 2017. China's engagement with Global South countries on technology projects—

particularly those in the ICT sector—predates the DSR. Chinese firms began internationalizing their digital offerings as early as 1999, following the launch of the PRC's "Going Out" strategy. What distinguishes the DSR is not the novelty of the activities it encompasses, but rather the centrality of these activities to China's broader economic and political strategy for global leadership. For more on this, see: Iginio Gagliardone and Sam Geall, China in Africa's Media and Telecommunications: Cooperation, Connectivity and Control, Norwegian Peacebuilding Resource Centre, April 2014, https://api.semanticscholar.org/CorpusID:154473645.

18. Dai Mochinaga, "The Expansion of China's Digital Silk Road and Japan's Response," Asia Policy 15, no. 1 (2020): 46, https://www.jstor.org/stable/26891387.

19. "中国-东盟智慧城市合作倡议领导人声明" ("China-ASEAN Smart Cities Cooperation Initiative Leaders' Statement"), National Development and Reform Commission of the People's Republic of China, November 8, 2019, https://www.ndrc.gov.cn/fggz/cxhgjsfz/dfjz/201911/t20191108_1201879.html.

20. Mochinaga, "Expansion of China's Digital Silk Road," 47.

21. Bong Xin Ying, "As the West Turns Cold, China's Tech Giants Warm Up to Southeast Asia - With Deep Pockets," Channel News Asia, August 7, 2025, https://www.channelnewsasia.com/east-asia/china-tech-giants-tencent-alibaba-sensetime-pivot-southeast-asia-5280276.

22. Zhu Rongji, "Report on the Outline of the Tenth Five-Year Plan for National Economic and Social Development (2001)," National People's Congress of the People's Republic of China, March 3, 2010, https://web.archive.org/web/20260113193046/https://www.npc.gov.cn/zgrdw/englishnpc/Special_11_5/2010-03/03/content_1690620.htm; Ting Xu, "Destination Unknown: Investment in China's 'Go Out' Policy," China Brief, Jamestown Foundation 11, no. 17 (September 16, 2011), https://jamestown.org/destination-unknown-investment-in-chinas-go-out-policy/.

23. Iginio Gagliardone, China, Africa, and the Future of the Internet (London: Zed Books, 2019), 29.

24. Ibid, 30.

25. Ibid.

26. Bianca Wright, "Made in China: Africa's ICT infrastructure backbone," CIO, March 23, 2020, https://www.cio.com/article/3533435/made-in-china-africas-ict-infrastructure-backbone.html; Aubrey Hruby, "The digital infrastructure imperative in African markets," Atlantic Council, April 8, 2021, https://www.atlanticcouncil.org/blogs/africasource/the-digital-infrastructure-imperative-in-african-markets/.

27. Jason Warner and Toyosi Ajibade, "China's Smart Cities in Africa: Should the United States Be Concerned?," CSIS, November 18, 2024, https://www.csis.org/analysis/chinas-smart-cities-africa-should-united-states-be-concerned; For a broad overview of trade relations, see: Li Zhengchun et al., "China-Africa Economic and Trade Relations Report 2023," Chinese Academy of International Trade and Economic Cooperation, 2023, https://www.caitec.org.cn/upfiles/file/2023/6/20230710163310913.pdf.

28. China's Engagement with Latin America and the Caribbean, US-China Economic and Security Review Commission, Staff Research Report, October 17, 2018, https://www.uscc.gov/research/chinas-engagement-latin-america-and-caribbean.

29. "中国对拉丁美洲和加勒比政策文件(全文)" ("China's Policy Paper on Latin America and the Caribbean (full text)"), china.com.cn, December 11, 2025, http://ydyl.china.com.cn/2025-12/11/content_118222042.shtml. For more on PRC cooperation with the region, see: Li Wenhan, "China-CELAC Forum Celebrates Milestones in South-South Cooperation," Beijing Review, May 19, 2025, https://www.bjreview.com/World/202505/t20250519_800402047.html; "China Focus: China, LatAm Deepen Digital Cooperation, Seek New Opportunities for Development," Xinhua, September 5, 2023, https://english.news.cn/20230905/223e36cd96d7424a8d554b64c375155b/c.html; Fermín Koop, Jack Lo Lau, and Juan Ortiz, "China-CELAC Summit Invests in Multilateralism Amid Global Trade Tensions," Eco-Business, May 28, 2025, https://www.eco-business.com/zh-hans/news/china-celac-summit-invests-in-multilateralism-amid-global-trade-tensions/; Diana Roy, "China's Growing Influence in Latin America," Council on Foreign Relations, June 6, 2025, https://www.cfr.org/backgrounder/china-influence-latin-america-argentina-brazil-venezuela-security-energy-bri.

30. Patrick Gillespie, "China's big chess move against the U.S.: Latin America," CNN, March 4, 2015, https://money.cnn.com/2015/03/04/news/economy/china-latin-america-relations-united-states/.

31. "Premier proposes '3 x 3' model for China-Latin America cooperation," People's Republic of China State Council, May 20, 2015, http://english.www.gov.cn/premier/news/2015/05/20/content_281475111313739.htm.

32. "Full text: China's Policy Paper on Latin America and the Caribbean," People's Republic of China State Council, December 10, 2025, https://english.www.gov.cn/news/202512/10/content_WS693962c3c6d00ca5f9a08069.html.

33. Yifang Wang, "New Infrastructure: Emerging Trends in Chinese Investment in Latin America," Inter-American Dialogue, April 25, 2024, https://thedialogue.org/analysis/new-infrastructure-emerging-trends-in-chinese-investment-in-latin-america/; Li Wenhan, "China-CELAC Forum Celebrates Milestones in South-South Cooperation," Beijing Review, May 19, 2025, https://www.bjreview.com/World/202505/t20250519_800402047.html; "China Focus: China, LatAm Deepen Digital Cooperation, Seek New Opportunities for Development," Xinhua, September 5, 2023, https://english.news.cn/20230905/223e36cd96d7424a8d554b64c375155b/c.html; Diana Roy, "China's Growing Influence in Latin America," Council on Foreign Relations, June 6, 2025, https://www.cfr.org/backgrounder/china-influence-latin-america-argentina-brazil-venezuela-security-energy-bri.

34. Binghua Lu, Qianlin Zhang, and Dingding Chen, "The Digital Silk Road in the Gulf: Navigating Risks Amid China-US Rivalry," The Diplomat, July 16, 2025, https://thediplomat.com/2025/07/the-digital-silk-road-in-the-gulf-navigating-risks-amid-china-us-rivalry/.

35. Ibid.

36. Andrea Benito, "MWC25: KSA accelerates digital transformation with Huawei-Zain partnership," CIO, March 6, 2025,

https://www.cio.com/article/3840275/mwc25-ksa-accelerates-digital-transformation-with-huawei-zain-partnership.html.

37. Lu, Zhang, and Chen, "Digital Silk Road in the Gulf"; "China's Huawei Opens Cloud Data Centre in Saudi Arabia in Regional Push," Reuters, September 4, 2023, https://www.reuters.com/technology/chinas-huawei-opens-cloud-data-centre-saudi-arabia-regional-push-2023-09-04/; Tom Porter, "The Saudi crown prince wants to build a trillion-dollar utopia in the desert. His deals with China reveal a darker vision.," Business Insider, April 23, 2023, https://www.businessinsider.com/saudi-crown-princes-china-deals-hint-city-darker-neom-mbs-2023-3.

38. Richard Heeks et al., "China's Digital Expansion in the Global South: Systematic Literature Review and Future Research Agenda," The Information Society 40, no. 2 (2024): 69–95.

39. Xinmei Shen, "China to pursue digital trade expansion under new five-year plan as cross-border data flow restrictions remain in place," South China Morning Post, October 21, 2021, https://www.scmp.com/tech/policy/article/3153196/china-pursue-digital-trade-expansion-under-new-five-year-plan-cross; Peter J. Buckley, "China's Belt and Road Initiative and the COVID-19 crisis," Journal of International Business Policy 3, no. 3 (2020): 311–4, as cited in Heeks et al., "China's Digital Expansion in the Global South," 69–95.

40. Kenton Thibaut, Chinese discourse power: Ambitions and reality in the digital domain, Atlantic Council, August 24, 2022, 2-3, https://www.atlanticcouncil.org/wp-content/uploads/2022/11/Chinese-Discourse-Power-Ambitions-and-Reality-in-the-Digital-Domain.pdf.

41. "数字丝绸之路:'一带一路'数字经济的机遇与挑战" ("Digital Silk Road: The Opportunities and Challenges in Developing the Digital Economy along the Belt and Road"), China Electronics and Information Industry Development Research Institute (Beijing: China Industry and Information Technology Publishing Group and Posts & Telecommunications Press, 2019). For a solid English-language accounting of DSR activity through 2020, see: "The Digital Silk Road: Expanding China's Digital Footprint", Eurasia Group, April 8, 2020, https://www.eurasiagroup.net/files/upload/Digital-Silk-Road-Expanding-China-Digital-Footprint.pdf; See also: "中国以'数字丝路'消弭信息鸿沟" ("China Uses 'Digital Silk Road' to Bridge Information Gap"), Xinhua, December 16, 2015, http://www.xinhuanet.com/politics/2015-12/16/c_1117485267.htm.

42. Nariman Aliyev, "Artificial Intelligence in Digital Silk Road: Driving Innovation and Economic Transformation," Euroasia Journal of Social Sciences & Humanities 12, no. 1 (2025), https://www.euroasiajournal.com/index.php/eurssh/article/view/510.

43. Hong Shen, "Building a Digital Silk Road? Situating the Internet in China's Belt and Road Initiative," International Journal of Communication 12 (2018): 19, https://ijoc.org/index.php/ijoc/article/view/8405/2386.

44. John Ruwitch, "What Overcapacity in Chinese Manufacturing Could Mean for American Businesses," NPR, April 22, 2024, https://www.npr.org/2024/04/22/1246429868/what-overcapacity-in-chinese-manufacturing-could-mean-for-american-businesses; Cole McFaul and Peter Engelke, "Navigating the US-PRC Tech Competition in the Global South," Atlantic Council, April 16, 2025, https://www.atlanticcouncil.org/in-depth-research-reports/report/navigating-the-us-prc-tech-competition-in-the-global-south/.

45. "High-technology exports (current US$) - China," World Bank, https://data.worldbank.org/indicator/TX.VAL.TECH.CD?locations=CN; Drawn from the World Bank database. High-tech exports "represent the value of products with high research and development (R&D) intensity, such as aerospace, computers, pharmaceuticals, scientific instruments, and advanced machinery, exported by a country in a given year; Sheene Chestnut Greitens et al., "China's Authoritarian Exports," Strauss Center, July 29, 2025, https://www.strausscenter.org/news/chinas-authoritarian-exports/.

46. Paul Triolo et al., "The Digital Silk Road: Expanding China's Digital Footprint," Eurasia Group, April 8, 2020, https://www.eurasiagroup.net/live-post/digital-silk-road-expanding-china-digital-footprint.

47. Yoko Kubota, "China Gears Up for More Tech Confrontation With U.S.," Wall Street Journal, October 23, 2025, https://www.wsj.com/world/china-vows-to-double-down-on-tech-self-reliance-as-u-s-rivalry-heats-up-83d19edb.

48. Katharina Buchholz, "Which Countries Have Banned Huawei?," Statista, January 30, 2020, https://www.statista.com/chart/17528/countries-which-have-banned-huawei-products/; Foo Yun Chee, "Huawei denies it poses security threat after EU warning," Reuters, December 7, 2018, https://www.reuters.com/article/technology/huawei-denies-it-poses-security-threat-after-eu-warning-idUSKBN1O61RN/; Peter Hartcher, "Huawei, no way: Why Australia banned the world's biggest telecoms firm," Sydney Morning Herald, May 3, 2021, https://www.smh.com.au/national/huawei-no-way-why-australia-banned-the-world-s-biggest-telecoms-firm-20210503-p57oc9.html.

49. "Chinese Firms Are Growing Rapidly in the Global South," Economist, August 1, 2024, https://www.economist.com/briefing/2024/08/01/chinese-firms-are-growing-rapidly-in-the-global-south.

50. Triolo et al., "The Digital Silk Road."

51. Motolani Peltola, Gong Xue, and Zheng Yu, "China-powered ICT Infrastructure: Lessons from Tanzania and Cambodia," South African Institute of International Affairs, December 15, 2021, https://saiia.org.za/research/china-powered-ict-infrastructure-lessons-from-tanzania-and-cambodia/; Sanchita Basu Das, "OBOR's Digital Connectivity Offers Both Benefits and Risks," ISEAS–Yusof Ishak Institute, August 4, 2017, https://www.iseas.edu.sg/articles-commentaries/iseas-perspective/201760-obors-digital-connectivity-offers-both-benefits-and-risks/.

52. Julien Clémençot, "Chinese Tech Giant Huawei Wins Support in Africa," Africa Report, June 11, 2018, https://www.theafricareport.com/13764/chinese-tech-giant-huawei-wins-support-in-africa/.

53. Thibaut, Chinese Discourse Power: Ambitions and Reality in the Digital Domain.

54. Wang Xiaolin and Lan Song, "'数字丝绸之路'数据跨境流动机制：逻辑框架与路径选择" ("'Digital Silk Road' Cross-Bor-

der Data Flow Mechanism: Logical Framework and Path Selection"), Journal of Humanities, no. 3 (2025): 46–56.

55. Ibid.

56. Clayton Cheney, "China's Digital Silk Road: Strategic Technological Competition and Exporting Political Illiberalism," Pacific Forum, July 2019, https://pacforum.org/wp-content/uploads/2019/08/issuesinsights_Vol19-WP8FINAL.pdf.

57. "Wang Yi: Building a Community with a Shared Future for Mankind Has Become a Glorious Banner Leading the Progress of the Times," Ministry of Foreign Affairs of the People's Republic of China, March 7, 2024, https://www.mfa.gov.cn/eng/wjbzhd/202403/t20240308_11256416.html; Xi Jinping, Holding High the Great Banner of Socialism with Chinese Characteristics and Striving in Unity for the Comprehensive Construction of a Modern Socialist Country—Report to the 20th National Congress of the Communist Party of China (Beijing: People's Publishing House, 2022).

58. Kenton Thibaut, China's discourse power operations in the Global South, Atlantic Council, April 20, 2022, https://www.atlanticcouncil.org/in-depth-research-reports/report/chinas-discourse-power-operations-in-the-global-south/.

59. Selected Letters of Xi Jinping: Volume 1 (Beijing: People's Publishing House, 2022). See also: "Xi Jinping Sends Congratulatory Letter to 2021 World Internet Conference Wuzhen Summit," Ministry of Public Security of the People's Republic of China, September 26, 2021, https://www.mps.gov.cn:9080/n2255079/n6865805/n7355748/n8012154/c8131689/content.html.

60. For more on how China engages in order-shaping via multilateral institutions, see: Xi Jinping, "Xi Urges Breaking New Ground in Major Country Diplomacy with Chinese Characteristics," Xinhua, June 24, 2018, http://www.xinhuanet.com/english/2018-06/24/c_137276269.htm; Kongdan Cai, "China's Initiatives: A Bypassing Strategy for the Reform of Global Economic Governance," Chinese Political Science Review 8, no. 1 (2023): 1–17, https://doi.org/10.1007/s41111-022-00215-7; Matthew D. Stephen, "Beyond Multilateralism: China's International Order Building through Transnational Policy Forums," The Pacific Review, November 2025, 1–26; Elizabeth Economy, "China's Alternative Order: And What America Should Learn from It," Foreign Affairs 103, no. 3 (2024): 8–24, https://www.foreignaffairs.com/china/chinas-alternative-order-xi-jinping-elizabeth-economy; Scott L. Kastner, Margaret M. Pearson, and Chad Rector, China's Strategic Multilateralism: Investing in Global Governance (Cambridge: Cambridge University Press, 2018), https://doi.org/10.1017/9781108695725; Nadège Rolland, "China's Vision for a New World Order," National Bureau of Asian Research Special Report, no. 83 (January 2020), https://www.nbr.org/wp-content/uploads/pdfs/publications/sr83_chinasvision_jan2020.pdf; Beverly Loke and Ralf Emmers, "Coalition-building and the Politics of Hegemonic Ordering in the Indo-Pacific," Australian Journal of International Affairs 79, no. 4 (2025): 543–551, https://doi.org/10.1080/10357718.2025.2509555.

61. "Global Digital Compact," United Nations, https://www.un.org/global-digital-compact/en.

62. "G77 and China Inputs to the Global Digital Compact Discussions," United Nations, https://www.un.org/digital-emerging-technologies/sites/www.un.org.techenvoy/files/GDC-submission_G77-and-China.pdf.

63. "G77 and China Inputs to the Global Digital Compact Discussions," United Nations, https://www.un.org/digital-emerging-technologies/sites/www.un.org.techenvoy/files/GDC-submission_G77-and-China.pdf.

64. Cheng and Zeng, "'Digital Silk Road' as a Slogan," 823–838; Oreglia and Zheng, "Digital Silk Road between National Rhetoric," 183–195.

65. Ibid.

66. Gerald Chan, China's Digital Silk Road: Setting Standards, Powering Growth (Cheltenham: Edward Elgar Publishing, 2022); Joshua Kurlantzick, "China's Digital Silk Road," Council on Foreign Relations, December 18, 2020, https://www.cfr.org/articles/china-digital-silk-road.

67. "Global AI Governance Action Plan," Ministry of Foreign Affairs of the People's Republic of China, July 26, 2025, https://www.fmprc.gov.cn/mfa_eng/xw/zyxw/202507/t20250729_11679232.html; "China Announces Action Plan for Global AI Governance," American National Standards Institute, August 1, 2025, https://www.ansi.org/standards-news/all-news/8-1-25-china-announces-action-plan-for-global-ai-governance.

68. "后疫情时代,数字丝路价值将更为彰显" ("In the Post-epidemic Era, the Value of the Digital Silk Road Will be More Prominent"), Fudan University's Institute for Research on the Belt and Road and Global Governance, August 17, 2020, https://baijiahao.baidu.com/s?id=1675252784436792803.

69. "Strengthening Infrastructure Construction and Building a Digital Foundation for Cities," Huawei, https://e.huawei.com/pl/ict-insights/global/ict_insights/ict33-digital-city/focus/strengthening-infrastructure-construction-and-building.

70. For more on this, see: Aliyev, "Artificial Intelligence in Digital Silk"; Yunis Sharifli, "Digital Silk Road 2.0: How China Is Shaping Central Asia's AI Ecosystem," China Global South Project, October 10, 2025, https://chinaglobalsouth.com/analysis/china-central-asia-ai-cooperation/; Erik Baark, "China's International Technology Standards Strategy and the Digital Silk Road", National University of Singapore East Asian Institute, August 13, 2021, https://research.nus.edu.sg/eai/wp-content/uploads/2022/07/EAIBB-No.-1604-China-Standards-and-Digital-Silk-Road-2.pdf; Jason Hung, "AI export and digital silk road: a comparative analysis of China's influences on digital economies and geopolitics across Southeast Asia", Frontiers in Political Science, (2025), https://www.frontiersin.org/journals/political-science/articles/10.3389/fpos.2025.1685231/full; Barry Naughton, "Chinese Industrial Policy and the Digital Silk Road: The Case of Alibaba in Malaysia," National Bureau of Asian Research, (2020), https://www.nbr.org/wp-content/uploads/pdfs/publications/ap15-1_2_digitalsilkroadrt_naughton_jan2020.pdf.

71. "携手构建网络空间命运共同体" ("Jointly Build a Community with a Shared Future in Cyberspace"), State Council Information Office of the People's Republic of China, November 7, 2022, http://www.scio.gov.cn/zfbps/ndhf/2022n/202303/t20230320_705527.html; "《中国的对外援助》白皮书" ("'China's Foreign Aid' White Paper"), State Council Information Office of the People's Republic

of China, China International Development Cooperation Agency, August 6, 2018, http://www.cidca.gov.cn/2018-08/06/c_129925064_2.htm; "2024携手构建网络空间命运共同体实践案例集" ("2024 Collection of Practice Cases of Jointly Building a Community with a Shared Future in Cyberspace"), World Internet Conference, 2024, https://www.docin.com/p-4774691157.html; "2022年携手构建网络空间命运共同体实践案例集" ("2022 Collection of Practice Cases of Jointly Building a Community with a Shared Future in Cyberspace"), Sohu News, 2024, https://news.sohu.com/a/830730419_121711272.

72. Kyle A. Jaros and Yeling Tan, "Provincial Power in a Centralizing China: The Politics of Domestic and International 'Development Space'," The China Journal 83 (2020): 79–104; Min Ye, The Belt Road and Beyond: State-mobilized Globalization in China: 1998–2018 (Cambridge: Cambridge University Press, 2020); Lee Jones and Jinghan Zeng, "Understanding China's 'Belt and Road Initiative': Beyond 'Grand Strategy' to a State Transformation Analysis," Third World Quarterly 40, no. 8 (2019): 1415–1439; Audrye Wong, "More than Peripheral: How Provinces Influence China's Foreign Policy," The China Quarterly 235 (2018): 735–757; Tim Summers, "China's 'New Silk Roads': Sub-national Regions and Networks of Global Political Economy," Third World Quarterly 37, no. 9 (2016): 1628–1643; Jinghan Zeng, "Narrating China's Belt and Road Initiative," Global Policy 10, no. 2 (2019): 207–216; Lee Jones and Shahar Hameiri, Fractured China: How State Transformation Is Shaping China's Rise (Cambridge: Cambridge University Press, 2021).

73. Wong, "More than Peripheral," 735–757.

74. Oreglia and Zheng, "Digital Silk Road between National Rhetoric"; Cheng and Zeng, "'Digital Silk Road' as a Slogan," 823–838.

75. Ibid.

76. Oreglia and Zheng, "Digital Silk Road between National Rhetoric."

77. "The Clean Network," United States Department of State, https://2017-2021.state.gov/the-clean-network/.

78. This is not to say, however, that the DSR declined in importance to the Chinese government. Digital initiatives and international cooperation on digital projects remained a high priority; explicit mentions of the project declined until 2023.

79. Oreglia and Zheng, "Digital Silk Road between National Rhetoric."

80. "习近平在第三届'一带一路'国际合作高峰论坛开幕式上的主旨演讲(全文)" ("Xi Jinping's Keynote Speech at the Opening Ceremony of the Third Belt and Road Forum for International Cooperation (Full Text)"), People's Daily, October 18, 2023, http://politics.people.com.cn/n1/2023/1018/c1024-40098098.html.

81. Ibid.

82. Graham Webster et al., "Full Translation: China's 'New Generation Artificial Intelligence Development Plan' (2017)," DigiChina, Stanford University, August 1, 2017, https://digichina.stanford.edu/work/full-translation-chinas-new-generation-artificial-intelligence-development-plan-2017/. See also: "沈逸:以RCEP签署落实为契机 扎实推进数字丝路的网络安全有效合作" ("Shen Yi: Taking the signing and implementation of RCEP as an opportunity, we should solidly advance effective cooperation in cybersecurity along the Digital Silk Road."), Caixin, March 12, 2021, https://fdifudan.blog.caixin.com/archives/243456.

83. "'一带一路'高峰论坛丨数字经济高级别论坛提出国际合作20项共识" ("Belt and Road Forum: High-Level Digital Economy Forum Proposes 20 Consensuses for International Cooperation"), Xinhua, October 19, 2023, https://www.news.cn/world/2023-10/19/c_1129925488.htm; "《'一带一路'数字经济国际合作北京倡议》发布;2023全球工业互联网大会开幕丨明日主题前瞻" ("Release of 'Belt and Road Digital Economy International Cooperation Beijing Initiative'; 2023 Global Industrial Internet Conference Opens"), Yicai, October 18, 2023, https://www.yicai.com/news/101878869.html.

84. Manoj Kewalramani, "China as a Rising Norm Entrepreneur: Examining GDI, GSI and GCI," Trends in Southeast Asia, ISEAS–Yusof Ishak Institute, January 2024, https://www.iseas.edu.sg/articles-commentaries/trends-in-southeast-asia/china-as-a-rising-norm-entrepreneur-examining-gdi-gsi-and-gci-by-manoj-kewalramani/.

85. "Global AI Governance Action Plan," Ministry of Foreign Affairs of the People's Republic of China, July 26, 2025, https://www.fmprc.gov.cn/mfa_eng/xw/zyxw/202507/t20250729_11679232.html; For an analysis of GAIGI and where it sits in China's broader foreign policy initiatives, see: Raphael Racicot and Kurtis H. Simpson, "China's AI Governance Initiative and Its Geopolitical Ambitions," Centre for International Governance Innovation, July 22, 2025, https://www.cigionline.org/articles/chinas-ai-governance-initiative-and-its-geopolitical-ambitions/.

86. Ben Jiang, "Officials Promote China-led Cyber Governance to Belt and Road Members during the Digital Silk Road Forum in Xian," South China Morning Post, April 16, 2024, https://www.scmp.com/tech/tech-trends/article/3259176/officials-promote-china-led-cyber-governance-belt-and-road-members-during-digital-silk-road-forum.

87. "Developing AI for Good and for All to Answer the Call of the Times for Shared Prosperity," Ministry of Foreign Affairs of the People's Republic of China, May 21, 2025, https://www.mfa.gov.cn/eng/wjb/zzjg_663340/jks_665232/jkxw_665234/202505/t20250521_11629968.html.

88. "李强出席2025世界人工智能大会暨人工智能全球治理高级别会议开幕式并致辞" ("Li Qiang Attends the Opening Ceremony of the 2025 World Artificial Intelligence Conference and High-Level Meeting on AI Global Governance and Delivers a Speech"), Ministry of Foreign Affairs of the People's Republic of China, July 26, 2025, https://www.mfa.gov.cn/web/wjdt_674879/gjldrhd_674881/202507/t20250726_11677829.shtml.

89. "外交部副部长马朝旭在人工智能全球治理高级别会议上的发言" ("Remarks by Vice Foreign Minister Ma Zhaoxu at the High-Level Meeting on Global AI Governance"), Ministry of Foreign Affairs of the People's Republic of China, July 26, 2025, https://www.mfa.gov.cn/web/wjdt_674879/wjbxw_674885/202507/t20250727_11677868.shtml.

90. "人工智能全球治理行动计划(全文)" ("Action Plan on Global Governance of Artificial Intelligence (Full Text)"), Minis-

try of Foreign Affairs of the People's Republic of China, July 26, 2025, https://www.mfa.gov.cn/zyxw/202507/t20250726_11677803.shtml.

91. "全球人工智能治理倡议" ("Global Initiative on AI Governance"), Cyberspace Administration of China, October 18, 2023, https://www.cac.gov.cn/2023-10/18/c_1699291032884978.htm.

92. Thibaut, Chinese Discourse Power: Ambitions and Reality in the Digital Domain.

93. Jing Cheng and Jinghan Zeng, "Shaping AI's Future? China in Global AI Governance," Journal of Contemporary China 32, no. 143 (2023): 794–810, https://doi.org/10.1080/10670564.2022.2107391.

94. Hanna Dohmen, "Assessing US-China Tech Competition in the Global South," Atlantic Council, November 20, 2024, https://www.atlanticcouncil.org/content-series/strategic-insights-memos/assessing-us-china-tech-competition-in-the-global-south/.

95. Wang Zhimin and Chen Zhenji, "【聚焦学理中国】推动'一带一路'共建国家数字治理——以'数字丝绸之路'为例" ("[Focus on Academic China] Promoting the Joint Construction of National Digital Governance along the Belt and Road Initiative – Taking the 'Digital Silk Road' as an Example"), Chinese Social Sciences Net, June 26, 2024, https://www.cssn.cn/gjgc/202406/t20240626_5761347.shtml.

96. "新华丝路网:书写高质量共建'一带一路'合作新篇章——中国进出口银行助力国际投资合作迈上新台阶" ("Xinhua Silk Road: Writing a New Chapter of High-Quality Belt and Road Cooperation - Export-Import Bank of China Helps International Investment Cooperation Reach New Heights"), Export-Import Bank of China, September 10, 2025, http://www.eximbank.gov.cn/info/circus/202509/t20250910_69505.html; "共建'一带一路':构建人类命运共同体的重大实践" ("Jointly Building the Belt and Road Initiative: A Major Practice in Building a Community with a Shared Future for Mankind"), State Council Information Office of the People's Republic of China, October 10, 2023, http://www.eximbank.gov.cn/info/szyw/202310/t20231010_53085.html; Yao Yunfang, "中国进出口银行外贸产业贷款余额达3.36万亿元" ("Export-Import Bank of China's Foreign Trade Industry Loan Balance Reaches 3.36 Trillion Yuan"), Xinhua, January 22, 2025, Belt and Road Portal, https://www.yidaiyilu.gov.cn/p/04H71TNB.html; "中国进出口银行2020年度报告" ("The Export-Import Bank of China 2020 Annual Report"), Export-Import Bank of China, 2020, http://english.eximbank.gov.cn/News/AnnualR/2020/202109/P020210907521124000588.pdf.

97. Jennifer Bouey et al., "China's AI Exports Database (CAIED)," AidData, December 11, 2023, https://www.aiddata.org/data/chinas-ai-exports-database-caied; William Marcellino et al., "Understanding China's AI Strategy in Developing Countries," RAND Corporation, December 11, 2023, https://www.rand.org/pubs/research_reports/RRA2696-1.html. AidData and RAND have addressed this measurement problem by tracking projects that "utilized or enabled" AI technologies, rather than attempting to isolate AI spending as a distinct line item.

98. Samantha Custer, Bryan Burgess, and Narayani Sritharan, "Into the Breach: Will China Step Up as the U.S. Retreats from Global Development?" AidData, March 2025, https://docs.aiddata.org/ad4/pdfs/Into_the_Breach.pdf.

99. Bouey et al., "China's AI Exports Database."

100. Custer, Burgess, and Sritharan, "Into the Breach."

101. "Full Text of Xi Jinping's Keynote Speech at 3rd Belt and Road Forum for Int'l Cooperation," State Council of the People's Republic of China, October 18, 2023, https://english.www.gov.cn/news/202310/18/content_WS652fc328c6d0868f4e8e064e.html; "Key Takeaways from BRI White Paper," State Council of the People's Republic of China, October 11, 2023, https://english.www.gov.cn/news/202310/11/content_WS6526994fc6d0868f4e8e024a.html.

102. Naughton, "Chinese Industrial Policy and the Digital Silk Road."

103. Jennifer Bouey et al., "China's AI Exports Database (CAIED)."

104. Steven Feldstein, "Testimony before the U.S.-China Economic and Security Review Commission: China's Strategic Aims in Africa," U.S.-China Economic and Security Review Commission, May 8, 2020, https://www.uscc.gov/sites/default/files/Feldstein_Testimony.pdf.

105. "Full Text of Xi Jinping's Keynote Speech at 3rd Belt and Road Forum for Int'l Cooperation," State Council of the People's Republic of China, October 18, 2023, https://english.www.gov.cn/news/202310/18/content_WS652fc328c6d0868f4e8e064e.html; "Key Takeaways from BRI White Paper," State Council of the People's Republic of China, October 11, 2023, https://english.www.gov.cn/news/202310/11/content_WS6526994fc6d0868f4e8e024a.html.

106. Chan Jia Hao and Deepakshi Rawat, "China's Digital Silk Road: The Integration of Myanmar Analysis," S. Rajaratnam School of International Studies, April 29, 2019, https://rsis.edu.sg/rsis-publication/rsis/chinas-digital-silk-road-the-integration-of-myanmar/; Kurlantzick, "China's Digital Silk Road."

107. "共建'一带一路':构建人类命运共同体的重大实践" ("Jointly Building the Belt and Road Initiative: A Major Practice in Building a Community With a Shared Future for Mankind"), State Council of the People's Republic of China, October 10, 2023, https://www.gov.cn/zhengce/202310/content_6907994.htm; "'数字丝路'造福全球" ("'Digital Silk Road' Benefits the World"), People's Daily Overseas Edition, Belt and Road Portal, February 13, 2023, https://www.yidaiyilu.gov.cn/p/306542.html; "第三届'一带一路'国际合作高峰论坛多边合作成果文件清单" ("List of Multilateral Cooperation Outcome Documents of the Third Belt and Road Forum for International Cooperation"), Belt and Road Forum, October 18, 2023, http://www.beltandroadforum.org/n101/2023/1018/c134-1211.html.

108. "2025年世界互联网大会数字丝路发展论坛在泉州开幕 李书磊出席并致辞" ("The 2025 World Internet Conference Digital Silk Road Development Forum Opened in Quanzhou. Li Shulei Attended and Delivered a Speech"), Xinhua, Belt and Road Portal, July 24, 2025, https://www.yidaiyilu.gov.cn/p/0POF34C4.html.

109. "Trade Policy Review," World Trade Organization, June 12, 2024, https://www.wto.org/english/tratop_e/tpr_e/s458_e.pdf; "'一带一路'贸易合作大数据报告(2018)" ("'Belt and

Road' Trade Cooperation Big Data Report (2018)"), National Information Center, May 2018, https://www.yidaiyilu.gov.cn/images/ebook/files/report.pdf; "新华丝路网:书写高质量共建'一带一路'合作新篇章——中国进出口银行助力国际投资合作迈上新台阶" ("Xinhua Silk Road: Writing a New Chapter of High-Quality Belt and Road Cooperation - Export-Import Bank of China Helps International Investment Cooperation Reach New Heights"), Export-Import Bank of China, September 10, 2025, http://www.eximbank.gov.cn/info/circus/202509/t20250910_69505.html; "共建'一带一路':构建人类命运共同体的重大实践" ("Jointly Building the Belt and Road Initiative: A Major Practice in Building a Community with a Shared Future for Mankind"), State Council Information Office of the People's Republic of China, October 10, 2023, http://www.eximbank.gov.cn/info/szyw/202310/t20231010_53085.html; Yao Yunfang, "中国进出口银行外贸产业贷款余额达3.36万亿元" ("Export-Import Bank of China's Foreign Trade Industry Loan Balance Reaches 3.36 Trillion Yuan"), Xinhua, January 22, 2025, Belt and Road Portal, https://www.yidaiyilu.gov.cn/p/04H71TNB.html; "中国进出口银行2020年度报告" ("The Export-Import Bank of China 2020 Annual Report"), Export-Import Bank of China, 2020, http://english.eximbank.gov.cn/News/AnnualR/2020/202109/P020210907521124000588.pdf.

110. "Trade Policy Review," World Trade Organization.

111. Christoph Nedopil Wang, "China Belt and Road Initiative (BRI) Investment Report 2023," Green Finance & Development Center, February 5, 2024, https://greenfdc.org/china-belt-and-road-initiative-bri-investment-report-2023/.

112. Aubrey Hruby, "Deconstructing the Dragon: China's Commercial Expansion in Africa," Atlantic Council, 2019, http://www.jstor.org/stable/resrep26690; Greitens, Inboden, and Klein, "China's Authoritarian Exports"; Belt and Road Construction Leadership Group, "中国-非洲国家共建'一带一路'发展报告" ("China-Africa Countries Joint Construction of the Belt and Road Development Report") (Beijing: China Planning Press, 2023), https://www.yidaiyilu.gov.cn/a/icmp/2023/12/15/20231215179983118/bcb251af-3c01496eb5f1cf47c7557171.pdf; "中国进出口银行2015年年度报告" ("The Export-Import Bank of China 2015 Annual Report"), Export-Import Bank of China, 2015, http://www.eximbank.gov.cn/aboutExim/annals/2015/201806/P020180612449684068720.pdf; "黑龙江:金融外汇赋能'一带一路'建设 助力区域开放跨越式发展" ("Heilongjiang: Financial Foreign Exchange Empowers Belt and Road Construction to Help Regional Opening and Leapfrog Development"), Xinhua Silk Road, May 20, 2025, https://www.imsilkroad.com/news/p/537056.html.

113. Bouey et al., "China's AI Exports Database"; Ammar A. Malik et al., "Banking on the Belt and Road: Insights from a New Global Dataset of 13,427 Chinese Development Projects," AidData, September 29, 2021, https://www.aiddata.org/publications/banking-on-the-belt-and-road.

114. Greitens, Inboden, and Klein, "China's Authoritarian Exports"; "The Export-Import Bank of China 2020 Annual Report," Export-Import Bank of China; Belt and Road Construction Leadership Group, "China-Africa Countries Joint Construction"; "The Export-Import Bank of China 2015 Annual Report," Export-Import Bank of China; "Heilongjiang: Financial Foreign Exchange," Xinhua Silk Road.

115. "丝路基金八年得失谈" ("Discussion on the gains and losses of the Silk Road Fund over eight years"), Caixin Weekly, September 24, 2022, https://weekly.caixin.com/2022-09-24/101944101.html.

116. "Investment Overview," Silk Road Fund, https://www.silkroadfund.com.cn/enweb/tzdt/tzgl/index.html.

117. "Project Summary," Asian Infrastructure Investment Bank, https://www.aiib.org/en/projects/summary/index.html.

118. "Key takeaways from BRI white paper," The State Council of the People's Republic of China, October 11, 2023, https://english.www.gov.cn/news/202310/11/content_WS6526994fc6d0868f4e8e024a.html.

119. Ibid.

120. Ibid.

121. Russel Deeks, "The Digital Silk Road: China's $200 Billion Project," BBC Science Focus, December 8, 2018, https://www.sciencefocus.com/future-technology/the-digital-silk-road-chinas-200-billion-project.; Thomas S. Eder, Rebecca Arcesati, and Jacob Mardell, "Networking the 'Belt and Road': The Future is Digital," Merics, August 28, 2019, https://merics.org/en/tracker/networking-belt-and-road-future-digital.; Andres Garcia, "China Embarks on Digital Silk Road," Invesco, May 19, 2019, https://www.invesco.com/content/dam/invesco/invest-china/en/pdf/invesco-china-fixed-income-digital-silk-road-en-global-disclaimer.pdf.; Dipanjan Roy Chaudhury, "China Reportedly Investing $8.43 bn in Africa as Part of Digital Silk Road Initiative," Economic Times, October 15, 2021, https://economictimes.indiatimes.com/news/international/world-news/china-reportedly-investing-8-43-bn-in-africa-as-part-of-digital-silk-road-initiative/articleshow/87039334.cms.

122. Bouey et al., "China's AI Exports Database (CAIED)."

123. "The Export-Import Bank of China 2020 Annual Report", Export-Import Bank of China; Belt and Road Construction Leadership Group, "China-Africa Countries Joint Construction"; "The Export-Import Bank of China 2015 Annual Report", Export-Import Bank of China; "Heilongjiang: Financial Foreign Exchange," Xinhua Silk Road.

124. Jochai Ben-Avie and Kenton Thibaut, "Connecting the Other Half of Humanity Is the Deal of the Century," Digital Forensic Research Lab, March 19, 2025, https://dfrlab.org/2025/03/19/connecting-the-other-half-of-humanity-is-the-deal-of-the-century/.

125. United States Government Accountability Office, International Infrastructure Projects: China's Investments Significantly Outpace the U.S., and Experts Suggest Potential Improvements to the U.S. Approach, GAO-24-106866 (Washington, D.C.: September 2024), https://www.gao.gov/assets/880/871278.pdf.

126. Jennifer Bouey et al., "China's AI Exports: Technology Distribution and Data Safety," RAND Corporation, December 11, 2023, https://www.rand.org/pubs/research_reports/RRA2696-2.html.

127. Jacob J. Lew et al., "China's Belt and Road: Implications for the United States," Council on Foreign Relations, March 2021, https://www.cfr.org/task-force-report/chinas-belt-and-road-implications-for-the-united-states/findings; Elliot Abrams, Ezra Hess, and Joshua Kurlantzick, "Protecting

U.S. Allies and Partners from Chinese Economic Coercion," Council on Foreign Relations, December 2, 2024, https://www.cfr.org/article/protecting-us-allies-and-partners-chinese-economic-coercion; Fergus Hunter, "Countering China's Coercive Diplomacy," Australian Strategic Policy Institute, February 22, 2023, https://www.aspi.org.au/report/countering-chinas-coercive-diplomacy/; Ketian Vivian Zhang, "Chinese Non-Military Coercion—Tactics and Rationale," Brookings Institution, January 22, 2019, https://www.brookings.edu/articles/chinese-non-military-coercion-tactics-and-rationale/.

128. Damian Raess, Wanlin Ren, and Patrick Wagner, "Hidden Strings Attached? Chinese (Commercially Oriented) Foreign Aid and International Political Alignment," Foreign Policy Analysis 18, no. 3 (2022), https://doi.org/10.1093/fpa/orac010.

129. Ibid; A note on methodology: Using AidData's Global Chinese Official Finance Dataset (2000–2014) and UNGA "ideal point" measures, the study finds robust correlations between Chinese OOF inflows and reduced ideological distance from China. Effects remain significant under instrumental-variable tests.

130. Zara C. Albright, "The Political and Pragmatic Determinants of Chinese Development Finance in Latin America and the Caribbean, 2008–2019," Latin American Politics and Society 67, no. 2 (2025): 78–97, https://doi.org/10.1017/lap.2024.54.

131. Austin Strange, "Influence Nodes: China's High-Profile Global Development Projects," Wilson Center, May 31, 2022, https://www.wilsoncenter.org/publication/influence-nodes-chinas-high-profile-global-development-projects.

132. Lukas Wellner, Axel Dreher, Andreas Fuchs, Bradley C. Parks, and Austin Strange, "Can Aid Buy Foreign Public Support? Evidence from Chinese Development Finance," Economic Development and Cultural Change 73, no. 2 (January 2025): 523–578. Note on methodology: Using georeferenced data on 2,850 Chinese government-financed development projects (2000–2017) combined with Gallup World Poll survey responses from over 50 countries, the authors employ event-study and instrumental variables designs to estimate the short- and long-term soft power effects of Chinese aid.

133. State Administration for Market Regulation (Standardization Administration of China), "《"一带一路"10周年标准化成果报告》发布" ("Belt and Road Initiative 10th Anniversary Standardization Achievement Report"), December 2024, https://www.yidaiyilu.gov.cn/p/0CD405UD.html.

134. John Seaman, "Technical Standards, Soft Connectivity and China's Belt and Road: Towards Greater Convergence or Fragmentation?," IFRI, February 2, 2025, https://www.ifri.org/en/external-articles/external-publications/technical-standards-soft-connectivity-and-chinas-belt-and. Important note: In practice, the BRI can provide a diplomatic umbrella for these agreements, but standardization outreach often operates through a patchwork of bilateral and regional arrangements rather than a single unified "BRI standards" framework.

135. Triolo et al., "The Digital Silk Road."

136. "Sharing Experiences from the Field: Scaling Digital and Data Solutions Through South-South and Triangular Cooperation Project Practices," United Nations Office for South-South Cooperation, September 29, 2025, https://unsouthsouth.org/2025/09/29/sharing-experiences-from-the-field-scaling-digital-and-data-solutions-through-south-south-and-triangular-cooperation-project-practices/.

137. Greitens, Inboden, and Klein, "China's Authoritarian Exports."

138. Ronald Sáenz Leandro and Carlos Saura García, China's Tech Surveillance Applications in Europe and Latin America – Analysing the Impact on Democratic Governance (European University Institute, 2024), https://data.europa.eu/doi/10.2870/097533; Rebecca Arcesati, "China's Rise in Digital Governance: Deploying Technology to Deliver Public Goods at Home and Abroad," Merics, March 2022, https://merics.org/sites/default/files/2022-03/MERICS-Primer-Digital-Governance-2021_final.pdf.

139. Brenda Goh, "Alibaba Cloud Announces New Data Centres in Malaysia, Philippines," Reuters, July 2, 2025, https://www.reuters.com/world/asia-pacific/alibaba-cloud-announces-new-data-centres-malaysia-philippines-2025-07-02/; "Alibaba Cloud Announces New Availability Zones," Alibaba Cloud, May 23, 2024, https://www.alibabacloud.com/en/press-room/alibaba-cloud-announces-new-availability-zones-and.

140. For a broader announcement on China's desire to cooperate with Global South countries on "smart health" solutions, see: "China's Medical AI: A New Engine for Digital Health," IDEAS-BRICS, October 30, 2025, https://ideas-brics.org/chinas-medical-ai-a-new-engine-for-digital-health/.

141. "United Imaging Healthcare," World Health Expo, December 27, 2025, https://www.worldhealthexpo.com/insights/leadership/united-imaging-healthcare; "SuperHealth and United Imaging Ink Rs 2500 Crore Partnership," BioSpectrum India, October 24, 2025, https://www.biospectrumindia.com/news/86/26829/superhealth-and-united-imaging-ink-rs-2500-crore-partnership.html.

142. "华为助力客户荣获全球智慧城市博览会1项大奖2个提名" ("Huawei Helps Customers Win 1 Major Award and 2 Nominations at Global Smart Cities Expo"), Huawei, November 18, 2016, https://www.huawei.com/cn/news/2016/11/new-ict-powers-smartcity-development; Alberto Lemma, "Will China's influence in Africa's AI revolution undermine its sovereignty?," November 28, 2024, https://odi.org/en/insights/opinion-will-chinas-influence-in-africas-ai-revolution-undermine-its-sovereignity/; Ebrahim Deen, "Africa's AI Future in the Context of the US-China AI Race," Global Center on AI Governance, June 3, 2024, https://www.globalcenter.ai/research/africas-ai-future-in-the-context-of-the-us-china-ai-race; Fan Chen, "As Africa races towards its AI revolution, China is with it each step of the way," South China Morning Post, March 1, 2025, https://www.scmp.com/news/china/diplomacy/article/3300312/africa-races-towards-its-ai-revolution-china-it-each-step-way; Musiime George, "Africa's Position on China's Global Initiative on AI Governance," January 20, 2025, https://www.dwcug.org/africas-position-on-chinas-global-initiative-on-ai-gov-

ernance/; Emily Peterson, "Could China Be a Partner in A.I. Evolution?," September 14, 2025, https://www.nytimes.com/2025/09/14/opinion/us-china-ai.html.

143. Raffaele Huang, "American Cloud Companies Face Challenge From China in Southeast Asia," Wall Street Journal, February 13, 2023, https://www.wsj.com/articles/amazon-microsoft-google-pressured-by-chinese-cloud-rivals-in-southeast-asia-2c8d98b4.

144. Chaudhury, "China Reportedly Investing $8.43 bn in Africa."

145. Liao Shumin, "Chinese AI Giant SenseTime Partners with Saudi Arabia SCAI," Yicai Global, September 14, 2022, https://www.yicaiglobal.com/news/chinese-ai-giant-sense-time-partners-with-saudi-arabia-scai.; "Huawei Announces Key Initiatives for Bangladesh," Dhaka Tribune, December 15, 2024, https://www.dhakatribune.com/business/368199/huawei-announces-key-initiatives-for-bangladesh.

146. Triolo et al., "The Digital Silk Road"; Gong Sen and Li Bingqin, "The Digital Silk Road and the Sustainable Development Goals," IDS Bulletin 50, no. 4 (December 18, 2019): 75–94, https://doi.org/10.19088/1968-2019.137; Yujia He, "Connecting the Emerging Markets: China's Growing Role in Global Digital Infrastructure," HKUST IEMS Thought Leadership Brief Series 2019-26 (April 2019), HKUST Institute for Emerging Market Studies, https://ideas.repec.org/p/hku/briefs/201926.html; Xinyue Shen, "Chinese ICT on the Digital Silk Road: A Case Study of Infrastructure Building in Pakistan" (Simon Fraser University, August 31, 2020), https://summit.sfu.ca/item/20723.

147. "China Digital Stack," Securing Democracy, June 15, 2022, https://securingdemocracy.gmfus.org/china-digital-stack/; Kenton Thibaut, Chinese Discourse Power Capabilities and Impact; Tim Rühlig, "Chinese Influence through Technical Standardization," Journal of Contemporary China 32, no. 139 (2023): 54–72, https://doi.org/10.1080/10670564.2022.2052439; Valentina Pop, Sha Hua, and Daniel Michaels, "From Lightbulbs to 5G, China Battles West for Control of Vital Technology Standards," Wall Street Journal, February 8, 2021, https://www.wsj.com/articles/from-lightbulbs-to-5g-china-battles-west-for-control-of-vital-technology-standards-11612722698.

148. Chen Yinmo, Zhang Ming, Wang Zhe, "华侨华人商会参与高质量共建'一带一路'现状、问题与展望" ("The Status, Problems and Prospects of Overseas Chinese Chambers of Commerce Participating in the High-Quality Joint Construction of the Belt and Road"), Asia-Pacific Economy, no. 3 (2023), http://www.ims.sdu.edu.cn/__local/C/A3/45/6DECA145F7064BE711738D14E04_3D376CB0_15D2F6.pdf.

149. Ibid.

150. Ibid.

151. Iris Deng, "Huawei, Vivo, Xiaomi Lead China's Smartphone Sales Surge Fuelled by Government Subsidies," South China Morning Post, February 27, 2025, https://www.scmp.com/tech/big-tech/article/3300373/huawei-vivo-xiaomi-lead-chinas-smartphone-sales-surge-fuelled-government-subsidies; Kelly Le, "China's Xiaomi Keeps No 3 Spot in Global Smartphone Market in First Quarter as Samsung Tops Apple," South China Morning Post, May 1, 2024, https://www.scmp.com/tech/big-tech/article/3261053/chinas-xiaomi-keeps-no-3-spot-global-smartphone-market-first-quarter-samsung-tops-apple; Daniel Ren, "How DeepSeek's AI Has Become a Must-Have Feature in Chinese Smart EVs," South China Morning Post, February 16, 2025, https://www.scmp.com/business/china-business/article/3298673/how-deepseeks-ai-has-become-must-have-feature-chinese-smart-evs.

152. Jared Dunnmon, "The Real Threat from Chinese AI," Foreign Affairs, February 28, 2025, https://www.foreignaffairs.com/china/real-threat-chinese-ai; Marianne Lu and Sam Winter-Levy, "The Other AI Race: An Export Promotion Strategy for the Global South," Carnegie Endowment for International Peace, July 21, 2025, https://carnegieendowment.org/research/2025/07/the-other-ai-race-an-export-promotion-strategy-for-the-global-south.

153. Lu and Winter-Levy, "The Other AI Race"; Hao Nan, "China's AI Push in the Global South Is Not Just About Technology," South China Morning Post, March 2, 2025, https://www.scmp.com/opinion/china-opinion/article/3300271/chinas-ai-push-global-south-not-just-about-technology.

154. Greitens, Inboden, and Klein, "China's Authoritarian Exports."

155. Folashadé Soulé, "Digital Sovereignty in Africa: Moving beyond Local Data Ownership," Centre for International Governance Innovation, June 25, 2024, https://www.cigionline.org/publications/digital-sovereignty-in-africa-moving-beyond-local-data-ownership/.

156. Nathan Lambert, "DeepSeek V3 and the Actual Cost of Frontier AI Models," Interconnects, January 9, 2025, https://www.interconnects.ai/p/deepseek-v3-and-the-actual-cost-of.

157. Lu and Winter-Levy, "The Other AI Race."

158. Meredith Chen, "China Could Counter US Tech Curbs by Engaging Global South on AI, Analysts Say," South China Morning Post, July 20, 2025, https://www.scmp.com/news/china/diplomacy/article/3318837/china-could-counter-us-tech-curbs-engaging-global-south-ai-analysts-say.

159. "习近平会见哈萨克斯坦总统 中哈互免签证协定即将生效" ("Xi Jinping meets with Kazakh President; China-Kazakhstan visa exemption agreement to take effect soon"), Caixin, October 17, 2023, https://international.caixin.com/2023-10-17/102117584.html; Zhang Ming, Chen Yinmo and Wang Zhe, "'一带一路'沿线经济数字化发展——基于TIMG指数的分析" ("Digital Development of the Economy along the Belt and Road Initiative: An Analysis Based on the TIMG Index"), Caixin Blog, November 2023, https://zhang-ming.blog.caixin.com/archives/271497.

160. "Digital Silk Road: A New Global Digital Economy Ecosystem Co-created and Shared by Platform Enterprises," "Digital Silk Road: A New Global Digital," World Internet Conference, July 2025, https://www.wicinternet.org/pdf/DigitalSilkRoadANewGlobalDigital.pdf.

161. Wang Haijun, Zhao Huiyan, and Jin Shutong, "How Does Modularization Empower Enterprises to Upgrade Their Intelligent Manufacturing? An Exploratory Case Study," Science & Technology Progress and Policy 41, no. 1 (2024): 149–160, https://www.kjjb.org/EN/10.6049/kjjbydc.Q202207328.

162. Alibaba Cloud Community, "Alibaba Cloud Celebrates

10 Years in Singapore with New Data Centers and AI Global Competency Center," Alibaba Cloud, July 2, 2025, https://www.alibabacloud.com/blog/alibaba-cloud-celebrates-10-years-in-singapore-with-new-data-centers-and-ai-global-competency-center_602337; Georgia Butler, "Alibaba Cloud Launches Third Data Center in Malaysia, Plans Second in Philippines," Data Center Dynamics, July 3, 2025, https://www.datacenterdynamics.com/en/news/alibaba-cloud-launches-third-data-center-in-malaysia-plans-second-in-philippines/; Alibaba Cloud Community, "Alibaba Cloud Establishes Second Data Center in Thailand with Richer Product Portfolio for Generative AI and Industry-Specific Solutions," Alibaba Cloud, February 13, 2025, https://www.alibabacloud.com/blog/alibaba-cloud-establishes-second-data-center-in-thailand-with-richer-product-portfolio-for-generative-ai-and-industry-specific-solutions_601985; Sam Phillips, "Alibaba Cloud Expands AI Footprint in Asia with New Data Centres in Malaysia, Philippines," South China Morning Post, July 2, 2025, https://www.scmp.com/tech/big-tech/article/3316610/alibaba-cloud-expands-ai-footprint-asia-new-data-centres-malaysia-philippines; "Huawei Cloud (International) FAQs," Huawei, May 20, 2025, https://support.huaweicloud.com/intl/en-us/intl_faq/intl_faq.pdf.

163. Vili Lehdonvirta, Boxi Wu, and Zoe Hawkins, "Weaponized Interdependence in a Bipolar World: How Economic Forces and Security Interests Shape the Global Reach of U.S. and Chinese Cloud Data Centres" (January 24, 2025), https://ssrn.com/abstract=4670764.

164. "Alibaba Cloud Bailian Open Source NL2SQL Intelligent Framework for Java Developers," Alibaba Cloud, June 20, 2025, https://www.alibabacloud.com/blog/alibaba-cloud-bailian-open-source-nl2sql-intelligent-framework-for-java-developers_602307.

165. Ibid.

166. "Digital Silk Road: A New Global Digital," 11.

167. Qwen Team, "Qwen3: Think Deeper, Act Faster," Qwen Blog, April 29, 2025, https://qwenlm.github.io/blog/qwen3/.

168. Meta Llama, "Llama-4-Maverick-17B-128E-Instruct," Hugging Face, April 5, 2025, https://huggingface.co/meta-llama/Llama-4-Maverick-17B-128E-Instruct.

169. Thibaut, Chinese Discourse Power: Capabilities and Impact.

170. Triolo et al., "The Digital Silk Road"; Du Mingming, "ITU Secretary-General: ICT a Foundation for Development under Belt and Road Initiative," People's Daily Online, May 23, 2017, https://archive.ph/HQP8x; "中国5G标准获国际电信联盟认可,华为参与,美国也没办法阻止" ("China's 5G Standard Is Recognized by the International Telecommunication Union, Huawei Participates, and the United States Has No Way to Stop It"), Gufeng Huiyun, July 16, 2020, https://archive.ph/EowLC; Daniel R. Russel and Blake H. Berger, Stacking the Deck: China's Influence in International Technology Standards Setting, Asia Society Policy Institute, November 30, 2021, https://asiasociety.org/sites/default/files/2021-11/ASPI_StacktheDeckreport_final.pdf.

171. "中共中央 国务院印发《国家标准化发展纲要》" ("The Central Committee of the Communist Party of China and the State Council Issued the 'National Standardization Development Outline'"), Central Government of the People's Republic of China, October 10, 2021, https://archive.ph/1ysci.

172. Science and Technology Department of the Chinese Ministry of Industry and Information Technology, "国家人工智能产业综合标准化体系建设指南(征求意见稿)" ("Guidelines for the Construction of a Comprehensive Standardization System for the National Artificial Intelligence Industry (Draft for Feedback)"), trans. Center for Security and Emerging Technology, January 17, 2024, https://cset.georgetown.edu/publication/china-ai-standards-system-guidelines-draft/.

173. "人工智能全球治理行动计划(全文)" ("Artificial Intelligence Global Governance Action Plan (Full Text)"), State Council of the People's Republic of China, July 26, 2025, https://www.gov.cn/yaowen/liebiao/202507/content_7033929.htm.

174. Ibid.

175. "Two Sessions Special Edition: SenseTime Technology Helps Build a Digital China and Empowers High-Quality Economic and Social Development," Sina Finance, March 2023; "Digital Silk Road: A New Global Digital," 8.

176. "'一带一路'10周年标准化成果报告" ("Report on Standardization Achievements at the 10th Anniversary of the Belt and Road (BRI)"), State Administration for Market Regulation, December 2024, https://oss.yidaiyilu.gov.cn/ice/2025/01/06/116326d3c0db4ddeb1bab2f83b71ca89.pdf.

177. State Administration for Market Regulation, "2023年中国标准化发展年度报告(五):标准助力高水平开放更加有序" ("2023 China Standardization Development Annual Report (V): Standards Help Make High-Level Opening More Orderly"), Sohu, April 8, 2024, https://www.sohu.com/a/770057845_121117464.

178. Thibaut, Chinese Discourse Power: Capabilities and Impact, 6.

179. McFaul and Engelke, "Navigating the US-PRC Tech Competition."

180. Kevin Xu, "Huawei Cloud and 'AI in the Box,'" Interconnected, May 23, 2024, https://interconnected.blog/huawei-cloud-and-ai-in-the-box/.

181. Evan A. Feigenbaum, "How China Wants High-Tech to Power Its Economy to the Top," Forbes, August 7, 2024, https://www.forbes.com/sites/evanfeigenbaum/2024/08/02/how-china-wants-high-tech-to-power-its-economy-to-the-top/.

182. "BRICS Leaders' Declaration," BRICS, July 5, 2025, http://brics.br/en/documents/presidency-documents/250705-brics-leaders-declaration-en.pdf.

183. Konstantinos Komaitis, "Analysis: A Brave New Reality After the UN's Global Digital Compact," Digital Forensic Research Lab (DFRLab), October 1, 2024, https://dfrlab.org/2024/10/01/analysis-a-brave-new-reality-after-the-uns-global-digital-compact/.

184. "Shanghai sees moves to make AI benefit all," The State Council of the People's Republic of China, July 5, 2024, https://english.www.gov.cn/news/202407/05/content_WS6687525fc6d0868f4e8e8e75.html.

185. "China's Network Connection Issues in Global AI Governance," East Asia Forum, September 13, 2024, https://eastasiaforum.org/2024/09/13/chinas-network-connection-is-

sues-in-global-ai-governance/.

186. "Group of Friends for International Cooperation on AI Capacity-building Formally Established," Permanent Mission of China to the United Nations, December 5, 2024, http://un.china-mission.gov.cn/eng/czthd/202412/t20241220_11508534.htm; "Enhancing international cooperation on capacity-building of artificial intelligence," United Nations Digital Library, June 25, 2024, https://digitallibrary.un.org/record/4053245?v=pdf&ln=en; Wang Yi, "Promoting Development for All and Bridging the AI Divide," Ministry of Foreign Affairs of the People's Republic of China, December 18, 2024, https://www.fmprc.gov.cn/eng/xw/zyjh/202412/t20241218_11497479.html.

187. "Position Paper of the People's Republic of China on Strengthening Ethical Governance of Artificial Intelligence (AI)," Ministry of Foreign Affairs of the People's Republic of China, May 31, 2024, https://www.fmprc.gov.cn/eng/zy/wjzc/202405/t20240531_11367525.html.

188. Thibaut, Chinese Discourse Power: Ambitions and Reality in the Digital Domain.

189. "UK, US, EU and China Sign Declaration of AI's 'Catastrophic' Danger," The Guardian, November 1, 2023, https://www.theguardian.com/technology/2023/nov/01/uk-us-eu-and-china-sign-declaration-of-ais-catastrophic-danger.

190. Deng Xiaoci and Liu Caiyu, "China eyes global cooperation at AI summit in Paris: expert," Global Times, February 2025, https://www.globaltimes.cn/page/202502/1328117.shtml.

191. Maya Wang, "China's Techno-Authoritarianism Has Gone Global," Human Rights Watch, April 8, 2021, https://www.hrw.org/news/2021/04/08/chinas-techno-authoritarianism-has-gone-global; Erin Baggott Carter and Brett L. Carter, "Exporting the Tools of Dictatorship: The Politics of China's Technology Transfers," Perspectives on Politics (2025): 1–20, https://doi.org/10.1017/S1537592724002226.

192. Bulelani Jili, "What Is Driving the Adoption of Chinese Surveillance Technology in Africa?," Atlantic Council, May 15, 2023, https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/what-is-driving-the-adoption-of-chinese-surveillance-technology-in-africa/.

193. Anna Gelpern et al., "Out of Public Sight, China's State-Backed Lenders Secure Priority Repayment from Emerging Economies with Cash Collateral," AidData, June 25, 2025, https://www.aiddata.org/blog/chinese-lenders-secure-repayment-from-emerging-economies-with-cash-collateral.

194. Daya Kishan Thussu, "China's Deepening Digital Presence in the Global South," The Round Table 114, no. 4 (2025): 363–378, https://doi.org/10.1080/00358533.2025.2514777; Bryce Barros, Nathan Kohlenberg, and Etienne Soula, "China and the Digital Information Stack in the Global South," German Marshall Fund, June 15, 2022, https://securingdemocracy.gmfus.org/china-digital-stack/.

195. "India bans TikTok, WeChat and dozens more Chinese apps," BBC News, June 29, 2020, https://www.bbc.com/news/technology-53225720.

196. Motolani Agbebi, Gong Xue, and Zheng Yu, "China-powered ICT Infrastructure: Lessons from Tanzania and Cambodia," South African Institute of International Affairs, December 15, 2021, https://saiia.org.za/research/china-powered-ict-infrastructure-lessons-from-tanzania-and-cambodia/; Jorge Carrillo and Jordy Micheli, "Huawei Mexico: Between the Construction of Upgrading and the Uncertainty Caused," in Huawei Goes Global: Volume II: Regional, Geopolitical Perspectives and Crisis Management, ed. Wenxian Zhang, Ilan Alon, and Christoph Lattemann (Cham: Springer International Publishing, 2020), 165–185; Will Chalk, "China's Digital Imperialism: Shaping the Global Internet," SupChina, July 2, 2019, https://thechinaproject.com/2019/07/02/chinas-digital-imperialism-shaping-the-global-internet/; Clayton Cheney, "China's Digital Silk Road: Strategic Technological Competition and Exporting Political Illiberalism," Council on Foreign Relations, September 26, 2019, https://www.cfr.org/blog/chinas-digital-silk-road-strategic-technological-competition-and-exporting-political.

197. Agbebi, Xue, and Yu, "China-powered ICT Infrastructure."

198. "中国品牌出海发展报告" ("Report on the Overseas Development of Chinese Enterprises"), Chinese Academy of International Trade and Economic Cooperation, January 22, 2025, https://www.caitec.org.cn/n6/sy_xsyj_yjbg/json/6770.html; "The Export-Import Bank of China 2020 Annual Report," Export-Import Bank of China; Belt and Road Construction Leadership Group, "China-Africa Countries Joint Construction"; "The Export-Import Bank of China 2015 Annual Report," Export-Import Bank of China; "Heilongjiang: Financial Foreign Exchange," Xinhua Silk Road.

199. Prashanth Parameswaran, "How Far Does the China Belt and Road Pushback Really Go?," The Diplomat, February 2019, https://thediplomat.com/2019/02/how-far-does-the-china-belt-and-road-pushback-really-go/. Note: Opaque procurement practices and reserved contracts can be advantageous when selling technology to authoritarian regimes and countries controlled by corrupt political elites. China has been successful in forming partnerships in these environments, as seen in several cases in Africa and Latin America.

200. The DFRLab developed a roadmap for such a strategy on the U.S. side, here: Kenton Thibaut and Jochai Ben-Avie, "DFC Reauthorization Is Here: The Good, the Bad, and the Next Steps for Connectivity," Digital Forensic Research Lab, January 23, 2026, https://dfrlab.org/2026/01/23/dfc-reauthorization-is-here-the-good-the-bad-and-the-next-steps-for-connectivity/; Ben-Avie and Thibaut, "Connecting the Other Half of Humanity."

201. "OECD.AI," OECD.AI, https://oecd.ai/en/.

202. "G7 reporting framework – Hiroshima AI Process (HAIP) international code of conduct for organizations developing advanced AI systems," OECD.AI, https://transparency.oecd.ai/.

203. "Global Partnership on Artificial Intelligence," OECD, https://www.oecd.org/en/about/programmes/global-partnership-on-artificial-intelligence.html.

204. "Recommendation on the Ethics of Artificial Intelligence," UNESCO.

205. "The EU Artificial Intelligence Act," European Union, https://artificialintelligenceact.eu/.

206. Ibid.

207. The Framework Convention on Artificial Intelligence," Council of Europe, September 5, 2024, https://www.coe.int/en/web/artificial-intelligence/the-framework-convention-on-artificial-intelligence.

208. "Digital Nation launches AI-based Fusion Intellect to assist digital transformation consultancy," e-Estonia, April 23, 2025, https://e-estonia.com/digital-nation-launches-ai-based-fusion-intellect/.

209. "The Hiroshima AI Process: Leading the Global Challenge to Shape Inclusive Governance for Generative AI," Government of Japan, February 9, 2024, https://www.japan.go.jp/kizuna/2024/02/hiroshima_ai_process.html.

210. "Friends Group," Hiroshima AI Process, May 2024, https://www.soumu.go.jp/hiroshimaaiprocess/en/supporters.html.

211. "Past and Present Senior Officials: Houlin ZHAO," International Telecommunication Union, https://www.itu.int/en/history/Pages/ElectedOfficialBio.aspx?off=46.

212. "Artificial Intelligence Global Governance Action Plan (Full Text)", State Council of the People's Republic of China.

213. "UN's Global Digital Compact Is Looking Like an Authoritarian Dream," Australian Strategic Policy Institute, July 1, 2024, https://www.aspistrategist.org.au/uns-global-digital-compact-is-looking-like-an-authoritarian-dream/.

214. Wang Ruijun, "Mr. Wang Ruijun, Director-General, National Center for Science and Technology Evaluation. Ministry of Science and Technology, China; and Chair of the UN Commission on Science and Technology for Development," United Nations Department of Economic and Social Affairs, https://sdgs.un.org/statements/mr-wang-ruijun-director-general-national-center-science-and-technology-evaluation.

215. "Working group on data governance at all levels," UN Trade and Development (UNCTAD), https://unctad.org/topic/commission-on-science-and-technology-for-development/working-group-on-data-governance

216. "BRICS AI Declaration," BRICS, July 6, 2025, http://www.brics.utoronto.ca/docs/250706-ai.html.

217. "China Must Not Politicize International Agencies," Nikkei Asia, April 1, 2020, https://asia.nikkei.com/opinion/the-nikkei-view/china-must-not-politicize-international-agencies.

218. Konstantinos Komaitas, "Protecting the Open Internet from China's Latest Governance Body," Brookings Institution, August 4, 2022, https://www.brookings.edu/articles/protecting-the-open-internet-from-chinas-latest-governance-body/.

219. See, for example: "Statement on Behalf of the Group of 77 and China Delivered by H.E. Ambassador Godfrey Kwoba, Deputy Permanent Representative of the Republic of Uganda to the UN, at the Second Committee General Discussion on Agenda Item 18: Sustainable Development," G77, https://www.g77.org/statement/getstatement.php?id=241014.

220. "Factsheet on the G7 Partnership for Global Infrastructure and Investment (PGII)," G7 Development Ministers' Meeting, October 23, 2024, https://www.g7.utoronto.ca/dev/2024-annex-i-gpii.html.

221. Nele Leosk, "Estonian Case – The Development and Promotion of Digital Public Infrastructures," Observer Research Foundation, October 26, 2022, https://www.orfonline.org/expert-speak/development-and-promotion-of-digital-public-infrastructures.

222. "Artificial Intelligence for Development," AI4D, https://www.ai4d.ai/.

223. "Hiroshima Process International Guiding Principles for Organizations Developing Advanced AI Systems," G7 Hiroshima Summit, https://www.mofa.go.jp/files/100573471.pdf.; See: "BRICS Signs AI Governance Declaration: Shaping Global AI Standards Through Multilateral Cooperation," Nemko Digital, August 6, 2025, https://digital.nemko.com/news/brics-ai-governance-declaration-2025.; See: Konstantinos Komaitis, "The G20 is moving forward on global AI governance—and the US risks being left out," New Atlanticist, December 2, 2025, https://www.atlanticcouncil.org/blogs/new-atlanticist/the-g20-is-moving-forward-on-global-ai-governance-and-the-us-risks-being-left-out/.; "Chairs Statement Task Force on Artificial Intelligence, Data, Governance and Innovation for Sustainable Development,"G7G20 Documents Database, https://g7g20-documents.org/database/document/2025-g20-south-africa-sherpa-track-digital-economy-ministers-ministers-language-chairs-statement-task-force-on-artificial-intelligence-data-governance-and-innovation-for-sustainable-development.

224. Currently, UNESCO's recommendations are offered in nine languages: "Recommendation on the Ethics of Artificial Intelligence," UNESCO, September 26, 2024, https://www.unesco.org/en/articles/recommendation-ethics-artificial-intelligence.

225. Alex Vines, "The African Union Becomes a Full Member of the G20," Wilson Center, January 28, 2025, https://www.wilsoncenter.org/article/african-union-becomes-full-member-g20.

226. "Global Dialogue on AI Governance," United Nations, https://www.un.org/global-dialogue-ai-governance/en.

227. "The Hiroshima AI Process: Leading the Global Challenge to Shape Inclusive Governance for Generative AI," Kizuna, February 9, 2024, https://www.japan.go.jp/kizuna/2024/02/hiroshima_ai_process.html.; "RightsCon: The world's leading summit on human rights in the digital age," RightsCon, https://www.rightscon.org/about-and-contact/.

The Atlantic Council is a nonpartisan organization that promotes constructive US leadership and engagement in international affairs based on the central role of the Atlantic community in meeting today's global challenges.

Atlantic Council
1400 L Street NW, 11th Floor
Washington, DC 20005

(202) 463-7226
www.AtlanticCouncil.org