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James Martin Center for Nonproliferation Studies

**Dangerous Decline:
Russia's Military and Security Influence
in the Global South and the Implications
for the United States**

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Executive Summary

This study argues that Russia seeks to boost its military and security influence in the Global South in light of what it considers a protracted, systemic confrontation with Western states. Russia's capacity to accrue such influence will vary considerably by domain and country. The war against Ukraine and its effects on Russia's economy, technology base, and reputation are shaping demand and supply side factors—what states in the Global South want from Russia, and what Russia can offer. Though Russian power projection in the Global South will be limited, the impact of Moscow's actions on U.S. strategic interests will not be trivial.

Key takeaways

- (1) Russia's pivot to the Global South will intensify.** Anticipating a long-term, systemic confrontation with Western states, Russia is prioritizing its power projection into the Global South, expecting economic, coercive, deterrent, and political benefits.
- (2) Russian arms sales: Down but not out.** The downward trajectory in Russia's weapons exports to countries of the Global South will most probably continue, given demand- and supply-side constraints. Russia will, however, likely remain highly active in several areas: the provision of defense articles to its biggest legacy customers, such as India; intensified cooperation with sub-Saharan Africa for lower-end defense goods; efforts to enhance competitiveness in the export of its military drones; and increased weapons deliveries to states hostile to the United States and/or countries of proliferation concern.
- (3) Russian PMCs: Preservation and rebranding.** The Russian government is undertaking measures to ensure the continuity of its private military company (PMC) business in Africa. Following the recent death of the Wagner Group's chief, Yevgeny Prigozhin, the group might morph into a semi-official entity tightly controlled by Russian state structures, be augmented or replaced by other PMCs, or a mixture of both. Regardless, Russia will most probably seek to retain a presence in core African theaters of operation (the Central African Republic, Libya, Mali, and Sudan) and may contemplate additional opportunities, in light of the recent coups in the Sahel.
- (4) Other Russian activities: Playing the long game.** Russia's permanent military basing in the Global South will likely remain limited to Syria, though it will conduct intermittent shows of force (through port calls, overflights, and exercises) elsewhere in the Global South to boost its coercive reputation in areas of strategic interest to the United States. Russia will also seek to leverage other pressure points—disinformation, cooperation on nuclear energy, or its sway over the wartime export of grain—to consolidate influence in Global South countries.
- (5) Russia's decline will be a dangerous decline.** In the Global South, Russia's capacity for projecting a sustained military threat to U.S. interests will likely be limited. Russia's various activities combined, however, highlight the dangers posed by a declining Russia. Moscow is intensifying its defense cooperation across regions with states hostile to Europe or the United States. It may form new defense "ecosystems," characterized by mutual support and knowledge diffusion, with these players. Particularly in Africa, there is also a risk of Russian incremental gains having knock-on effects. Over the long term, however, the People's Republic of China will pose the bigger challenge to U.S. interests in the Global South.

1. Introduction

Eighteen months into its full-scale war against Ukraine, Russia remains committed to a long-term struggle with Western states.¹ By subjugating the Ukrainian polity, President Vladimir Putin hopes not only to lay claim to a privileged sphere of influence in Central and Eastern Europe but also to bring about a new era of global politics. This era, as Putin envisions it, would be genuinely postcolonial, solicitous of conservative values, and robustly multipolar—that is, freed from U.S. dominance. The Russian leadership considers its struggle over Ukraine to be long-term and systemic, and its break with the West to be total.

Against this backdrop, Russia has pursued ties with countries in the Global South with intensified urgency since February 2022: It has attempted to secure lifelines for the Russian defense enterprise and economy, whether that be arms supplied by the Democratic People’s Republic of Korea (DPRK) and Iran or emerging markets for its energy products in Asia. It has launched an aggressive war of narratives across the Global South to convince countries of its own narrative on the Ukraine war. Finally, it has thrown wrenches into legacy multilateral institutions and pushed to elevate alternative diplomatic fora that involve Global South partners at the exclusion of Western states—such as the BRICS grouping, which brings together Brazil, Russia, India, China, and South Africa, and will soon be expanded to include six other nations.

Russia has also sought out opportunities to maintain or expand its military and security influence across the Global South. That influence comprises activities as diverse as selling (or procuring) weapons and defense articles, securing permanent or temporary military access or basing, engaging in joint military exercises, and deploying private military companies (PMCs) that fulfill a range of tasks. Arms sales and the activities undertaken by Russian PMCs are economically attractive to the Kremlin and affiliated businesses, at a time of decreasing commercial opportunities for them in Western states. Moreover, such activities promise to leave Russia as a formidable competitor against Western democratic and human rights interests in various regions of the Global South. While Russia therefore has the *intention* to boost its military and security influence in the Global South, its *capacity* to do so will vary considerably by domain and country. Russia’s war against Ukraine is shaping demand- and supply-side factors—what Global South partners want from Russia, and what Russia can offer—and those factors will, in turn, shape Russia’s position as a security player.

Prior to the war in Ukraine, Russian arms exports to the Global South were already on a downward trajectory, having dropped by 31 percent between the periods 2013–17 and 2018–22. While India, China, and Egypt (in that order) remained the largest recipients of Russian weapons between 2018 and 2022, the period immediately preceding the Ukraine invasion was characterized by a drop in Russian deliveries to those states, as well as a low volume of pending deliveries overall.² Russian PMCs, chiefly the Wagner Group, had consolidated a presence in select African and Middle Eastern theaters by the time President Putin ordered an all-out assault on Ukraine. Russia also maintained a naval port and military air base in Syria, while its efforts to secure a permanent base in Sudan were stuck in limbo.

¹ This report was written in September 2023 and takes into account events that occurred up until late September/early October 2023.

² Peter D. Wezeman, Justine Gaedon, and Siemon T. Wezeman, “Trends in International Arms Transfers, 2022,” Stockholm International Peace Research Institute (SIPRI), March 2023, https://www.sipri.org/sites/default/files/2023-03/2303_at_fact_sheet_2022_v2.pdf.

In the months following the invasion of Ukraine, Russia continued to transfer defense articles to its partners in the Global South, as evidenced by an analysis of bills of lading and port calls by Russian vessels, conducted for this study. However, a further drop in pending deliveries for major arms (such as combat aircraft or warships), and reassessments or cancellations of deals with major partners (Egypt, India, and the Philippines) have been indicative of Russia's difficulties. While Russia's military presence in Syria has remained solid since February 2022, notwithstanding some reshuffling in personnel and military hardware, its quest for a naval base in Sudan experienced a further setback with the onset of civil war in that country. Russia's PMC business in Africa, meanwhile, continued to thrive even as the Wagner Group was deploying substantial forces to the Ukrainian battlefield. Presently, however, it is undergoing a dramatic reconfiguration in the wake of the attempted mutiny by and subsequent killing of Prigozhin.

Scope and Methodology

This study examines Russia's *intent* and *capacity* to consolidate and expand its military and security influence in the Global South against the backdrop of the Ukraine war. It asks in which Global South countries Russia is likely to prioritize the pursuit of such influence, and in what domains; which countries will be especially susceptible to Russian attempts at building such influence; what opportunities and limitations Russia might face; and what implications Russia's future engagement will have for U.S. strategic interests.

There is no commonly shared definition of what countries form part of the Global South, and usage of the term is controversial. The study adopts an expansive understanding of the Global South, to include not just economically less developed countries in accordance with historical definitions,³ but a broader set of countries in Africa, Asia, Latin America and the Caribbean, the Middle East and North Africa. Since the term Global South has increasingly become synonymous with the 134 states that today form part of the G77, this study looks at those countries, though with a few exceptions.⁴ The study does not cover all states at the same level of detail, but focuses on those where Russia's present or planned activities matter most. Russia's military and security influence is understood to comprise the country's trade in weapons and defense articles (exports and imports), joint military exercises, and permanent or temporary military access and presence. It also includes tasks performed by Russian PMCs in Global South countries, such as training, military advice, personal security to leaders, the guarding of minerals and resources, and counter-insurgency operations. Finally, the study acknowledges Russian activities not narrowly understood to be of a military nature, but that could have serious security implications for the target country. Those include the provision of technologies and services related to civilian nuclear energy programs, the leveraging of grain supplies to exert pressure on governments, or the backing of rogue states at the United Nations, among others.

³ For a discussion of the historical use of the term Global South and its definitions, see Patrick Stewart and Alexandra Huggins, "The Term 'Global South' Is Surging. It Should Be Retired," Carnegie Endowment for International Peace, August 14, 2023, <https://carnegieendowment.org/2023/08/15/term-global-south-is-surging.-it-should-be-retired-pub-90376>.

⁴ Azerbaijan and Turkmenistan currently form part of the G77, but this study does not consider countries in the former Soviet Union as part of the Global South. China maintains that it is not a G77 member, and it is not being treated in depth in this study, given the broad focus. A thorough examination of Russian-Chinese military and security cooperation would warrant a separate, in-depth study.

The analysis of Russian arms exports following the invasion of Ukraine is based on (1) bills of lading for Rosoboronexport (and Russian defense entities listed as exporting on behalf of Rosoboronexport), and (2) a detailed mapping of vessels known to, or standing accused of, shipping defense articles on behalf of Russia, including the port and berth calls of these vessels, between February and December 2022.⁵ The analysis was further enriched and augmented by open-source and (international and Russian) media reporting on Russian arms exports. Russian PMC activity, meanwhile, was monitored through a combination of Russian-language Telegram channels affiliated with Wagner and other Russian PMCs, media reporting, the social media presence of pro-Russian pan-African influencers, and reporting by relevant nongovernmental organizations and political risk consultancies that monitor Russian PMC activities, including via on-the-ground sources in African states.

2. The Context: Russia's Pivot Towards the Global South

Russia's pivot to the Global South started long before the Ukraine war, leveraging past Soviet activism in Africa, the Middle East, and Latin America, while also building on former prime minister Yevgeny Primakov's contention in the late 1990s that the world was "multipolar." In the 2000s, Russia expanded arms sales to Latin America and Asia, and it returned to the Middle East as a military player with its intervention in the Syrian civil war in 2015. Since February 2022, however, Russia has considerably upped the ante in the Global South, hoping to secure lifelines for the Russian economy and defense enterprise. Russia has found emerging markets for its hydrocarbon products in Asia and Latin America, while procuring weaponry from the DPRK, Iran, and Myanmar.

Claiming that its war against Ukraine is at once defensive, preventive, existential, and challenging America's purported claim to global hegemony, Russia has also engaged in an aggressive war of narratives across the Global South. At a minimum, the Kremlin has hoped to encourage states to adopt a neutral posture vis-à-vis Russia's war at the United Nations and in other fora. Giving credence to Russia's new Foreign Policy Concept, which attributes a heightened importance to Russia's relations with the non-West, Russian diplomats have prioritized engagement with Global South countries.⁶ Foreign Minister Sergey Lavrov's visits to several African, Latin American, and Middle Eastern countries have represented only the most visible forms of that engagement, capping a flurry of lower-level diplomatic activity. Russia's quest for greater access has taken different forms, including efforts to loosen visa requirements and establish direct air travel with many countries in the Global South,⁷ and more obscure ventures such as expanding the Russian *Yandex.Taxi* business into Africa and Latin America.⁸

⁵ The author would like to thank Eric Woods for his support with the analysis of bills of lading and vessel movements.

⁶ Ministry of Foreign Affairs of the Russian Federation, "The Concept of the Foreign Policy of the Russian Federation," March 31, 2023, https://mid.ru/en/foreign_policy/fundamental_documents/1860586/.

⁷ "MID Rossii nazval strany, s kotorymi gotovitsya uproshhennyi vizovyi rezhim" [The Russian Foreign Ministry named the countries with which a simplified visa regime is being prepared], Tass, March 5, 2023, <https://tass.ru/politika/17201137>; "RF mozhnet otkryt' aviasoobshhenie s M'yanmoi, Mongoliei, Yuzhnoi Koreei, YuAR i Alzhirom" [Russia may open flights with Myanmar, Mongolia, South Korea, South Africa and Algeria], Tass, March 30, 2023, <https://tass.ru/ekonomika/17405295>.

⁸ "Yandeks testiruet servis taksi v Namibii i Mozambike" [Yandex is testing its taxi service in Namibia and Mozambique], Tass, February 13, 2023, <https://tass.ru/ekonomika/17036981>; "Yandeks nachal testirovat' svoi servis taksi v Peru" [Yandex began testing its taxi service in Peru], Tass, March 28, 2023, <https://tass.ru/ekonomika/17385171>.

Africa has become a priority area for the Kremlin, as evidenced by Russia's aggressive anti-neocolonial narrative targeted at the continent. With its demographic dynamism, Africa represents an important area of growth for the Russian economy, and one where Russia has an extensive Soviet-era foundation on which to build. Though Africa is far from the front lines of Russia's security and though the continent's geopolitical configuration is not existential for Russia, Russia has acted as a "low-cost" security provider, selling armaments and deploying Wagner forces whose services have included training, military advice, personal security to leaders, and counterinsurgency operations. In doing so, the Kremlin has sought to keep friendly regimes in power and to align its military presence in Africa with its economic interests while also projecting power into the Southern Mediterranean, Europe's Achilles' heel.

Since the invasion of Ukraine, Russia has courted African states even more aggressively, hosting its second Russia-Africa Parliamentary Conference and its second Russia-Africa summit in recent months. It has promised to (re-)open embassies across the continent and to deliver free fertilizer and grain to countries in need.⁹ The hallmark of Russia's strategic messaging on the Ukraine war—that Russia is leading an anti-neocolonial struggle against Western states—is clearly aimed at audiences in Africa, where resentment over Europe's colonial past continues to fester. Whether it is Russia's new Foreign Policy Concept, remarks by President Putin¹⁰ or Russian diplomats,¹¹ or publications and events by leading Russian think tanks¹²—Russia's official discourse is replete with anti-colonial tropes. Those tropes have been instrumentalized for policy in concrete areas, such as an effort to encourage countries to quit the Rome Statute of the International Criminal Court, which issued an arrest warrant against Putin.¹³

It is against this broader backdrop that Russia has sought opportunities to maintain or expand its military and security influence across the Global South. That influence comprises activities as diverse as selling (or procuring) weapons and defense articles, securing permanent or temporary military presence, engaging in joint military exercises, or deploying PMCs that fulfill a range of tasks. Even if Russia's pursuit of such influence is haphazard and only successful in select areas, it advances several objectives tied to Russia's confrontation with the West over Ukraine: First, arms sales and activities undertaken by PMCs promise economic gain to the Kremlin or affiliated oligarchs, which Russia hopes will at least partially offset the country's economic isolation caused by Western sanctions. Second, by fostering partnerships in the military and security sphere in these countries, Russia hopes to

⁹ "Rossiya namerena otkryt' posol'stva pochti vo vsekh stranakh Afriki" [Russia intends to open embassies in almost all African countries], *Kommersant*, July 25, 2023, <https://www.kommersant.ru/doc/6123613>.

¹⁰ Vladimir Putin, "Meeting in the BRICS Plus/Outreach Format," August 24, 2023, <http://en.kremlin.ru/events/president/news/72096>.

¹¹ "Foreign Minister Sergey Lavrov's Remarks at the Meeting of the United Russia Party General Council Commission on International Cooperation and Support for Compatriots Abroad," June 19, 2023, https://mid.ru/en/foreign_policy/news/1889118/.

¹² "Valdai Club To Discuss The Struggle Against Neocolonialism," Valdai Discussion Club, February 16, 2023, <https://valdaiclub.com/events/announcements/valdai-club-to-discuss-russia-and-the-fight-against-neo-colonialism/>; "Challenges of Shaping the Image of Russia in Africa Discussed at RIAC Roundtable," Russian International Affairs Council, May 18, 2023, <https://russiancouncil.ru/en/news/challenges-of-shaping-the-image-of-russia-in-africa-discussed-at-riac-round-table/>.

¹³ This effort was discussed, for instance, at an expert roundtable hosted by the Russian International Affairs Council on March 24, 2023: "Ekspertnyi kruglyi stol 'Zapadnye i nezapadnye provaidery bezopasnosti v Afrike'" [Expert Roundtable 'Western and Non-Western Security Providers in Africa'], *Russian International Affairs Council*, March 24, 2023, video available at: <https://www.youtube.com/watch?v=9yeh87cezGY>.

contribute to a broader effort to undermine U.S. leadership, present Russia as a global actor, and advance its vision of a post-Western order. Third, Russia's military influence in regions such as Asia, Latin America, and the Middle East is meant to serve a strategy of deterrence toward U.S. advances into Russia's hinterland, allowing the Kremlin to respond with shows of strength in regions of vital interest to the United States whenever it feels its interests in its immediate neighborhood are threatened. Russian PMC activities and the provision of arms also leave Russia as a formidable competitor against Western democratic and human rights interests in parts of the Global South.

Russia thus clearly has the *intent* to boost its military and security influence in the Global South, viewing such influence as serving its broader confrontation with Western states. The more pertinent questions, upon which the rest of this study is focused, are these: What is Russia's *capacity*—given materiel and other constraints—to realize its objectives? And which regions and domains does Russia prioritize?

3. Russia's Military and Security Influence in the Global South Before and Since the Invasion of Ukraine

3.1 Russia's Weapons Trade with the Global South: Down but Not Out

Russian arms sales prior to the invasion of Ukraine

Prior to the war against Ukraine, Russian arms exports were on a downward trajectory, having dropped by 31 percent between the 2013–17 and 2018–22 time periods. The drop was driven by significantly lower export volumes in the years 2020–2022 compared to previous years. While India, China, and Egypt remained the largest recipients of Russian weapons between 2018 and 2022, the period immediately preceding the Ukraine invasion was characterized by a drop in deliveries to those states, as well as a low volume of pending Russian deliveries overall.¹⁴

States in Asia received the majority of Russian arms in 2018–22, with China and India the leading importers.¹⁵ India took delivery of Russian MiG-29 and Su-30 fighter aircraft, T-90 tanks, warships, and anti-ship missile systems. Moscow also exported Su-27 and Su-30 fighter aircraft to Indonesia, Malaysia and Vietnam—Russia's most important Southeast Asian customer between 2000 and 2021—and sold air-to-air missiles, anti-ship missiles, and helicopters throughout the region.¹⁶ In the 1990s and 2000s, Russia had held a strong presence as an arms exporter to Southeast Asian states, selling anti-ship missiles and military aircraft that would elevate the small air forces of these countries. Between 2014 and 2021, however, Russian arms sales to Southeast Asia declined sharply, dropping from 1.2 billion USD in 2014 to just 89 million USD in 2021.¹⁷ Analysts pointed to Western sanctions and

¹⁴ Wezeman, Gaedon, and Wezeman, "Trends in International Arms Transfers, 2022."

¹⁵ Ibid. SIPRI adds Oceania to Asia.

¹⁶ Richard Bitzinger and Kenneth Boutin, "Russia's New Arm's Distance from Asia," *East Asia Forum*, August 27, 2022, <https://www.eastasiaforum.org/2022/08/27/russias-new-arms-distance-from-asia/#:~:text=Southeast%20Asia%20is%20another%20profitable.and%20helicopters%20throughout%20the%20region.>

¹⁷ Ian Storey, "Russia's Defense Diplomacy in Southeast Asia: A Tenuous Lead in Arms Sales But Lagging in Other Areas," Yusof Ishak Institute (ISEAS), 2021, <https://www.iseas.edu.sg/articles-commentaries/iseas->

export controls imposed on Russia after 2014, a pause in Vietnam’s military modernization efforts, and growing competition from other exporters as the main drivers of the decline.¹⁸ As a result, Russia’s share of arms sales to countries in the Association of Southeast Asian Nations (ASEAN) shrank from a peak of 43 percent in 2011 to just 8 percent in 2021, and from 2017, South Korea began to eclipse Russia as the region’s top arms supplier.¹⁹

Between 2018-2022, according to data from the Stockholm International Peace Research Institute (SIPRI), 17 percent of Russian arms exports went to the Middle East and 12 percent to Africa. Algeria and Egypt were Russia’s principal customers, though Moscow also sold arms to other countries including Iraq, Iran, and, to a lesser extent, Turkey and the Arab Gulf states.²⁰ Maintaining a deep defense relationship with Russia, Algeria had procured the export variant of the Iskander short-range ballistic missile from Russia in 2013. Between 2014 and 2019, Algeria purchased two improved Kilo-class submarines²¹ and signed contracts for MiG-29M/M2 and Su-30MKI multi-role fighters.²² News reports released prior to 2022 also noted ongoing negotiations for the acquisition of warships, Su-57 stealth aircraft, and Su-34 bombers.²³ Egypt, meanwhile, ordered Russian combat aircraft and S-300VM (Antey-2500) anti-ballistic missile systems from Russia.²⁴

Sub-Saharan Africa represented a region of considerable growth for Russian arms exporters; in the period 2018-2022, Russia overtook China as the major weapons supplier in that region. However, sub-Saharan Africa accounts for only 2 percent of total global arms imports, highlighting the limited scale of Russian inroads. With Angola, Nigeria, and Uganda—major Russian customers—defense ties were primarily characterized by helicopter and aircraft deals through the 2010s. Russian arms exports to Mali experienced a particular boost starting in 2016, with Bamako reportedly receiving several Mi-35M combat helicopters.²⁵

Finally, Latin America represented the biggest laggard among regions of the Global South in terms of importing Russian arms prior to the invasion of Ukraine. The region had received a mere 0.8 percent of total Russian arm exports in 2015-2019, though it retained a substantial base of Soviet-produced arms from the Cold War era.²⁶ The commercial successes of Russian

[perspective/2021-33-russias-defence-diplomacy-in-southeast-asia-a-tenuous-lead-in-arms-sales-but-lagging-in-other-areas-by-ian-storey/](#).

¹⁸ Ibid.

¹⁹ Mike Ives, “Southeast Asia is a case study in Russia’s declining prospects as an arms exporter,” *New York Times*, November 6, 2022, <https://www.nytimes.com/2022/11/06/world/europe/russia-weapons-southeast-asia.html>.

²⁰ SIPRI, in its dataset, counts Egypt as part of the Middle East, but Algeria as part of Africa.

²¹ “Istochnik: dve dizel'-elektricheskie podlodki dlya Alzhira postroyat v RF” [Source: Two diesel-electric submarines for Algeria will be built in Russia], RIA, June 26, 2014, <https://ria.ru/20140626/1013659969.html>.

²² “Alzhir kupil rossiiskie istrebiteli na summu okolo \$2 mlrd” [Algeria bought Russian fighter jets for about \$2 billion] *Vedomosti*, September 9, 2019, <https://www.vedomosti.ru/politics/articles/2019/09/09/810856-alzhir-kupil-istrebiteli>.

²³ “Postavka Su-57 i Su-34 v Alzhir poluchila pervoe potverzhenie” [Delivery of Su-57 and Su-34 to Algeria received first confirmation], *Avia Pro*, March 13, 2021, <https://avia.pro/news/postavka-su-57-i-su-34-v-alzhir-poluchila-pervoe-podtverzhenie>.

²⁴ For information on Egypt’s purchase of MiG-29s, see Ivan Safronov, “V Egipte razbilsya istrebitel' rossiiskogo proizvodstva MiG-29” [Russian-made MiG-29 fighter jet crashed in Egypt], *Vedomosti*, December 5, 2019, <https://www.vedomosti.ru/politics/articles/2019/12/05/817963-v-egipte-mig-29>.

²⁵ “Rossiya peredala Mali boevye vertolety Mi-35M” [Russia hands over Mi-35M combat helicopters to Mali], *RBC*, October 3, 2017, <https://www.rbc.ru/rbcfreenews/59d3a9699a79473b48a7e564>.

²⁶ Evan Ellis, “Russia in the Western Hemisphere: Assessing Putin’s Malign Influence in Latin America and the Caribbean,” Congressional Testimony to the House Foreign Affairs Subcommittee on Western Hemisphere, Civilian Security, Migration and International Economic Policy, July 20, 2022,

armaments in Latin America in the decade prior (late 2000s and early 2010s) had been driven primarily by one customer (Venezuela) and one system (the Mi-17 helicopter)—a basis that was too narrow to allow for Russia’s lasting market penetration.²⁷ The recent collapse of Latin America’s arms imports from Russia was driven by a combination of factors: budgetary shortfalls in the countries that were potential purchasers, saturated demand among Latin American armed forces due to previous purchases, and collapsing finances in Nicaragua and Venezuela, Russia’s most important clients.²⁸

Russian arms sales since the invasion of Ukraine

Following the invasion of Ukraine, Russia worked hard to keep up the appearance of an able and attractive weapons exporter to the Global South. Speaking at the “Army-2022” weapons exhibition in August 2022, President Putin called Russian arms “significantly superior” to those produced by rivals and advertised Russia’s readiness to sell advanced weapons to allies globally and cooperate in developing military technology.²⁹ The Federal Service for Military-Technical Cooperation (FSMTC), Russia’s executive body responsible for control and oversight of military-technical cooperation with foreign countries, stated repeatedly that Moscow continued to fulfill all arms exports obligations and that its portfolio of export orders remained “stable.”³⁰ Russian arms producers also signaled “business as usual” in their participation in international arms fairs—such as the Aero India 2023 defense forum, the United Arab Emirates’ IDEX defense fair, and the Vietnam International Defense Expo—claiming to showcase hundreds of weapons systems.

The authors created a customized dataset of Russian bills of lading and vessel movements to measure whether Russia’s desire to project “business as usual” matches reality. The analysis of this dataset suggests that Russia indeed continued to transfer defense articles to its partners in the Global South in the period following the Ukraine invasion.

Between January and December 30, 2022, 7,445 bills of lading were recorded in the dataset. Of those, 4,889 were recorded after February 24, 2022 (Table 1, Column 3). Of the 685 million USD in defense goods exported by Russia to India in all of 2022, 684 million USD occurred after the invasion, as did defense articles worth 49 million USD (of the 52 million USD) sent to Algeria. What stands out in the data is the geographic spread of transfers listed. Vessels that form part of Russia’s arms export infrastructure repeatedly visited several of Russia’s defense partners despite the reputational costs and risks of secondary sanctions for those countries. Port calls, for which data is available from February 24 until December 31, 2022, are logged in Table 1, Column 4.³¹

<https://www.csis.org/analysis/russia-western-hemisphere-assessing-putins-malign-influence-latin-america-and-caribbean>.

²⁷ Roman Ortiz, “Arms Transfers and Major Power Competition in Latin America,” CEEEP, January 3, 2023, <https://ceeep.mil.pe/2023/01/03/transferencias-de-armamento-y-competencia-de-grandes-potencias-en-america-latina/?lang=en>.

²⁸ Ibid.

²⁹ “Putin calls Russian arms ‘significantly superior’ to rivals,” *Al Jazeera*, August 15, 2022, <https://www.aljazeera.com/news/2022/8/15/moscow-ready-to-cooperate-with-allies-on-advanced-weapons-putin>.

³⁰ For example: “Glava FSVTS soobshhil, chto Rossiya prodolzhaet vpolnyat' vse obyazatel'stva po eksportu oruzhiya” [The head of the FSMTC said that Russia continues to fulfill all obligations regarding the export of weapons], *Interfax*, February 13, 2023, <https://www.interfax.ru/russia/885856>.

³¹ For Egypt, passages through the Suez Canal (which are technically counted as port calls) have been removed in order to prevent misrepresentation of how many vessels left from ports in Egyptian cities. Passages through

Table 1: Bills of lading and vessel movements for Russia, Feb. 24–Dec. 31, 2022

Country	Post-invasion exports, in USD, until December 31, 2022; per bills of lading records for Rosoboronexport, entities listed as operating on behalf of Rosoboronexport, Almaz Antey, etc. Unit: \$K	Post-invasion logged port calls, until December 31, 2022; by Russian vessels linked to arms transfers
India	684,560	153
Algeria	49,500	3
Egypt	36,050	66
Myanmar	18,550	2
Malaysia	4,800	1
China	3,570	51
Indonesia	1,140	2
Uganda	326.5	N/A
Bangladesh	301.3	2
Iraq	3.6	N/A
Vietnam	1.4	N/A ³²
Iran	No exports declared	130
Country of destination not declared	304,640	N/A

In the dataset, India registers the most port call departures (with 153 port calls³³) and also stands out as the leading importer of defense articles with over 680 million USD from Rosoboronexport and affiliated entities between February 24 and December 31, 2022. Exports worth 300 million USD are unaccounted for in the dataset, raising the question of undeclared defense exports—an important caveat when assessing the data. Still, the general trends apparent in the port call data match the patterns in the bills of lading, with states receiving higher exports of defense articles generally receiving more port visits from vessels credibly accused or previously documented of having shipped Russian arms. This shows that Russia’s supply chain of military goods to partners in the Global South continued after the invasion of Ukraine.

Table 2 shows exports using bills of lading for the entire year (2022), rather than just after the invasion, as well as for the period 2019-2021. Such data is useful for comparing Russia’s post-invasion defense transfers with those of prior years. While more data would be needed to robustly forecast post-invasion trends, the data suggests that shipments to Russia’s core

the Turkish straits, logged as port calls, are removed for the same reason. Port calls to Hong Kong are recorded as China and make up the bulk of port departures by defense-linked Russian vessels from China.

³² No port call data is available for Vietnam. But Vietnam may be stepping up its covert weapons imports from Russia. In early September 2023, the New York Times reported that Vietnam has proposed to secretly pay for its defense purchases from Russia through transfers at a joint Vietnamese and Russian oil venture in Siberia. Hannah Beech, “Vietnam Chases Secret Russian Arms Deal, Even as It Deepens U.S. Ties,” *New York Times*, September 9, 2023, <https://www.nytimes.com/2023/09/09/world/asia/vietnam-russia-arms-deal.html>.

³³ This number is not necessarily indicative of 153 individual transfers, since vessels may move between different Indian cities along the subcontinent’s massive coastline.

defense partners—while having fluctuated considerably from one year to another³⁴—continued in significant amounts after the Ukraine invasion. In the case of India, 2022 was the most active year in the available data on bills of lading. Curiously, bills of lading for China totaled 5.9 million USD in 2022, a figure considerably lower than in previous years. Since a large number of sanctioned Russian vessels visited Chinese ports, it is unclear how much of the “non-declared” end users in the bills of lading for 2022 were in China (or, indeed, in other countries seeking to obfuscate their continued defense relationships with Russia).³⁵ The considerable jump in exports having their destination marked as “not declared”—317 million USD in 2022—points to a general trend of Russia seeking to evade sanctions and obfuscating defense exports after the invasion of Ukraine.

Table 2: Bills of lading for Russia, 2019-2022, Unit: \$K

	2019	2020	2021	2022
China	212,700	154,760	35,590	5,920
India	132,140	113,780	502,910	685,600
Algeria	163,590	7,090	214,100	52,100
Egypt	186,980	84,870	214,010	36,050
Iran	31,220	48	-	-
Syria	2,310	7,180	-	-
Myanmar	29,920	1,520	9,220	65,510
Niger	3,210	2,910	-	-
Mali	3,170	2,820	-	-
Malaysia	1,670	-	6,780	4,800
Indonesia	-	-	1,530	1,140
Bangladesh	986	765	1,590	301
Vietnam	89	55	28,180	7
Uganda	44	39	3,260	326
Venezuela	-	4	-	-
Country of destination not declared	48,430	4,950	-	317,200

While generally refuting the idea that Russian defense exports collapsed after February 2022, the data fails to indicate, however, what specific defense articles Russia exported. It also does not give a sense of any challenges Russia might have faced in ongoing negotiations regarding arms deals, or of delays and difficulties in fulfilling orders. According to the *Moscow Times*, Russian defense firms concluded contracts worth a mere 390 million USD at the Army-2022 forum, one-sixth of the figure for the prior year.³⁶ Similarly, the most recent SIPRI report

³⁴ There are two explanations for the considerable year-on-year fluctuation in the bills of lading: First, since deliveries pertain to long-term defense contracts, some years may see many deliveries and/or shipments of large items, whereas other years may see fewer shipments and/or shipments of (less expensive) maintenance products related to large items. Second, the fluctuation is partially explained by the opaque nature of the arms trade: states may distort or underreport shipments, with reasons ranging from corruption to national security reasons and deliberate deception.

³⁵ SIPRI noted a decreasing Chinese reliance on Russian arms imports between 2018 and 2022 and attributed it to Beijing having ramped up its domestic production. Still, between 2018 and 2022, 83 percent of Chinese arms imports came from Russia. Wezeman, Gaedon, and Wezeman, “Trends in International Arms Transfers, 2022.”

³⁶ “Rossiya teryaet krupneishego pokupatelya oruzhiya: Indiya zamorozila peregovory po vertoletam i samoletam” [Russia loses largest arms buyer: India froze talks on helicopters and aircraft], *The Moscow Times*, February 13, 2023, <https://www.moscowtimes.ru/2023/02/13/rossiya-teryaet-krupneishego-pokupatelya-oruzhiya-indiya-zamorozila-peregovori-po-vertoletam-i-samoletam-a33902>.

notes a low volume of pending Russian arms deliveries at the end of December 2022, though it is unclear whether that low volume resulted from the pre-existing trend of declining orders or whether it was causally linked to the Ukraine war.

In Asia, the example of the Philippines serves to highlight the challenges Russia has faced in light of the Ukraine war. In March 2022, the government said it would proceed with a deal—signed and partially paid for before the invasion of Ukraine—to purchase 17 military transport helicopters from Russia.³⁷ Four months later, the Associated Press reported that the Philippines had scrapped the deal because of fears of U.S. sanctions,³⁸ prompting Russian officials to call on Manila to honor their commitment.³⁹ Though Russia exerted considerable efforts to maintain its relationship with Vietnam,⁴⁰ there were indications of Hanoi’s continuing effort to diversify its sources of arms.⁴¹ With Myanmar, meanwhile, Russia’s arms trade intensified, with Russian entities reportedly providing the junta with weapons worth 406 million USD, including advanced fighter jets.⁴² In August 2023, the junta’s new defense minister attended Russia’s military-technical forum and the 11th Moscow Conference on International Security with the intention to further boost defense ties.

The most complex dynamics in Russia’s post-invasion Asian arms trade, however, relate to India—the leader in the bills of lading and vessel movement data⁴³—to which Russian exports had already declined by 37 percent between the periods 2013–17 and 2018–22. While Russia vowed in early 2023 that its deliveries of the S-400 “Triumf” air defense system would proceed as scheduled,⁴⁴ reports of its inability to completely fulfill its contractual obligations regarding the system soon surfaced.⁴⁵ The Indian Air Force also became concerned over Russia’s ability to continue to service its Su-30MKI and MiG-29 fighter jets. These challenges have been compounded by problems related to payment modalities for deliveries, with India reluctant to settle bills in U.S. dollars due to concerns about secondary

³⁷ David Hutt, “Why Southeast Asia continues to buy Russian weapons,” *DW*, May 4, 2022, <https://www.dw.com/en/why-southeast-asia-continues-to-buy-russian-weapons/a-61364950>.

³⁸ “Philippines scraps Russian helicopter deal – AP,” Reuters, July 27, 2022, <https://www.reuters.com/business/aerospace-defense/philippines-scraps-russian-helicopter-deal-ap-2022-07-27/>.

³⁹ “Russia says Philippines should honour military helicopters deal,” *Al Jazeera*, October 20, 2022, <https://www.aljazeera.com/news/2022/10/20/moscow-tells-manila-to-honour-military-helicopter-purchase-deal>.

⁴⁰ There have been several high-level engagements between Russia and Vietnam since the invasion of Ukraine, most recently the 12th Vietnam-Russia defense and security strategic dialogue in Moscow on August 29, 2023.

⁴¹ “Vietnam eyes Czech military supplies as Hanoi tries to pivot away from reliance on Russian arms,” *South China Morning Post*, April 24, 2023, <https://www.scmp.com/news/asia/southeast-asia/article/3218170/vietnam-eyes-czech-military-supplies-hanoi-tries-pivot-away-reliance-russian-arms>.

⁴² “Myanmar military has imported weaponry worth \$1bn since coup,” *Al Jazeera*, May 18, 2023, <https://www.aljazeera.com/news/2023/5/18/myanmar-military-has-imported-weaponry-worth-1bn-since-coup>; “Myanmar coup: Russia supplying military with advanced fighter jets – BBC News,” *Global Herald*, June 3, 2023, <https://theglobalherald.com/news/myanmar-coup-russia-supplying-military-with-advanced-fighter-jets-bbc-news/>.

⁴³ The bills of lading for India list items including oscilloscopes, automatic data processors, electrical motors, electrical switches and other component parts for maintaining various military systems, and radar and radionavigation equipment. While model numbers and information in relation to what weapons systems these items are meant to be applied to is not available in the bills of lading, items shipped from Almaz Antey and its subsidiaries account for a significant amount of the transfers.

⁴⁴ “RF planiruet zavershit' postavki sistem S-400 Indii v srok” [Russia plans to complete deliveries of S-400 systems to India on time], *Interfax*, February 13, 2023, <https://www.interfax.ru/russia/885870>. In summer 2022, the U.S. House of Representatives granted India a CAATSA waiver for its procurement of the S-400 in light of the U.S. effort to deter China.

⁴⁵ Rhea Mogul, “Russia can’t meet India arms deliveries due to Ukraine war, Indian Air Force says,” *CNN*, March 24, 2023, <https://edition.cnn.com/2023/03/24/india/india-russia-arms-delivery-ukraine-war-intl-hnk/index.html>.

sanctions, while Russia remained unwilling to accept rupees due to exchange-rate volatility. Meanwhile, India reportedly froze negotiations to procure Ka-226T helicopters from Russia.⁴⁶

Notwithstanding these problems, Russian equipment still makes up 85 percent of the Indian arsenal and could be used until 2065⁴⁷—meaning that India’s reliance on Moscow for spare parts and maintenance will most likely continue, as suggested by the bills of lading and vessel movement data. The Russian-Indian defense relationship has put down deep roots: BrahMos, a joint venture between India and Russia, advanced negotiations to sell Indonesia supersonic cruise missiles, having secured its first foreign deal, with the Philippines, just weeks prior to Russia’s invasion of Ukraine.⁴⁸ India also produces Russian T-90S main battle tanks locally,⁴⁹ and while it has indigenized some components of the BrahMos missile, the ramjet is still provided by Russia. At a closed roundtable attended by the author in May 2023, an Indian defense expert cautioned against overstating the deterioration in the Russian-Indian arms relationship, noting an Indian “appreciation for Russian investments in Indian strategic capabilities historically” and emphasizing that deliveries of Russian spare parts since February 2022 had been “slow but not denied,” a situation satisfactory to India “given the defense production cycle.”

In the Middle East, the most noteworthy trends in Russia’s post-invasion weapons trade relate to Algeria, Egypt, and Iran. According to the data from the bills of lading, Russian exports of defense materiel to Algeria and Egypt—major legacy importers of Russian arms—continued after February 2022. FSMTC chief Dmitry Shugaev has visited Algeria at least three times since the Ukraine invasion to discuss defense deals.⁵⁰ Around the time of the 2023 St. Petersburg International Economic Forum, held in June and attended by the Algerian president, Russian media reported that Algeria had promised to sign a large contract for 12-17 billion USD worth of Russian arms supplies, including Sukhoi stealth aircraft, bombers and fighters.⁵¹ However, to date, no deal has been announced, and, given the drastic decline in overall Algerian arms imports in recent years, rumors of a deal need to be taken with a grain of salt.⁵² One of Russia’s chief weapons importers prior to the Ukraine war, Egypt, canceled a large order for Su-35 combat aircraft in 2022. While the threat of Countering America’s Adversaries Through Sanctions Act (CAATSA) sanctions is said to have played a major role in Cairo’s decision, there is also evidence to suggest that Egyptian concerns over

⁴⁶ “Rossiya teryaet krupneishego pokupatelya oruzhiya: Indiya zamorozila peregovory po vertoletam i samoletam.”

⁴⁷ Karishma Mehrotra, “As Modi visits White House, India’s reliance on Russian arms constrains him,” *Washington Post*, June 20, 2023, <https://www.washingtonpost.com/world/2023/06/20/modi-india-russia-military-equipment/>.

⁴⁸ Devjyot Ghoshal, “India-Russia defence firm eyes \$200 mn missile deal with Indonesia,” Reuters, March 15, 2023, <https://www.reuters.com/business/aerospace-defense/india-russia-defence-firm-eyes-200-mln-missile-deal-with-indonesia-2023-03-15/>.

⁴⁹ Vivek Raghuvanshi, “India pays Russia \$1.2 billion in technology transfer fees for T-90 tanks,” *Defense News*, November 26, 2019, <https://www.defensenews.com/land/2019/11/26/india-pays-russia-12-billion-in-technology-transfer-fees-for-t-90s-tanks/>.

⁵⁰ “Algeria, Russia discuss military, technical cooperation,” CGTN, June 9, 2023, <https://news.cgtn.com/news/2023-06-09/Algeria-Russia-discuss-military-technical-cooperation-1kutFb9S1cE/index.html>.

⁵¹ Jack Dutton, “Algeria’s Tebboune uses reliable partner status to secure Russian arms,” *Al-Monitor*, June 19, 2023, <https://www.al-monitor.com/originals/2023/06/algerias-tebboune-uses-reliable-partner-status-secure-russian-arms>.

⁵² “Algeria’s Arms Imports Drop By 58%,” *Asharq Al-Awsat*, March 20, 2023, <https://english.aawsat.com/home/article/4222581/algeria%E2%80%99s-arms-imports-drop-58>.

the interoperability of the Su-35 with its largely Western-supplied networks and command and control systems may have played a role.⁵³

But among Russia's defense relationships in the Middle East, it is the one with Iran that has seen the most significant movement since the invasion of Ukraine. Starting in the summer of 2022, Russia procured combat unmanned aerial vehicles (UAVs)—especially Shahed-131/Shahed-136 drones (repainted and renamed by Russia as Geran-1/Geran-2)—for employment predominantly against Ukraine's civilian infrastructure.⁵⁴ It also received body armor, ammunition, and artillery shells. Iran's assistance recalibrated what previously had been a patron-client defense relationship. Western officials have warned that Moscow intends to provide Tehran with an unprecedented level of military support in return for its drone assistance,⁵⁵ including attack helicopters, air defense systems, combat and trainer aircraft, military radars, and militarily sensitive electronics. It is unclear how much of that support has materialized over the past 18 months or will be sent in the future. Sources close to the Iranian government announced in March 2023, for instance, that a contract to procure Su-35s was already finalized,⁵⁶ but no planes have been delivered to date. Other reports indicate that Russia has already supplied Iran with cyber weapons, including advanced digital surveillance capabilities.⁵⁷

In sub-Saharan Africa, Moscow has continued to make inroads, especially in providing lower-end gear (older helicopters and aircraft). Mali, Togo and Uganda all procured Mi-24/Mi-28/Mi-35 variant combat helicopters from Russia in 2022.⁵⁸ Countries that saw military coups in recent years—among them Burkina Faso and Mali—vocally vowed to deepen their defense relationships with Moscow after the Ukraine invasion. Russia, eager to see this come to fruition, has since 2022 more aggressively sought to block the U.N. secretary general's appointments or renewals of panels monitoring sanctions enforcement in some of these countries.⁵⁹ More recently, Russia has also expressed enthusiasm for exporting its reconnaissance drones and unmanned combat aerial vehicles (UCAVs) to Africa. Systems were displayed to prospective African customers at the Russia-Africa summit in July 2023 and at the Army-2023 forum in August 2023. As Samuel Bendett, an expert on Russia's

⁵³ Off-the-record conversation between author and Egyptian defense expert; Paul Iddon, "Egypt has spent big on diversifying its air force, but to what end?," *Middle East Eye*, September 9, 2022, <https://www.middleeasteye.net/news/egypt-has-spent-big-diversifying-its-air-force-what-end>.

⁵⁴ Russia also acquired Shahed-129, Shahed-191, and Mohajer-6 drones.

⁵⁵ "Russia-Iran military partnership 'unprecedented' and growing, officials say," *Washington Post*, December 9, 2022, <https://www.washingtonpost.com/national-security/2022/12/09/russia-iran-drone-missile/>; "Russia has been sending some US-provided weapons captured in Ukraine to Iran, sources say," *CNN*, March 14, 2023, <https://edition.cnn.com/2023/03/10/politics/russia-iran-ukraine-weapons>.

⁵⁶ "Iran to buy Su-35 warplanes from Russia – Iranian broadcaster," *Iran International*, March 11, 2023, <https://www.iranintl.com/en/202303110871>.

⁵⁷ "Russia Supplies Iran With Cyber Weapons As Military Cooperation Grows," *Wall Street Journal*, March 27, 2023, https://www.wsj.com/articles/russia-supplies-iran-with-cyber-weapons-as-military-cooperation-grows-b14b94cd?st=oxlk35r0cgdt94y&reflink=share_mobilewebshare.

⁵⁸ "Rossiya peredala Mali partiyu voennykh samoletov i vertoletov" [Russia handed over a batch of military aircraft and helicopters to Mali], *Vedomosti*, August 9, 2022, <https://www.vedomosti.ru/politics/news/2022/08/09/935219-rossiya-peredala-mali-partiyu>; "Rossiya peredala Togo boevye vertolety Mi-35" [Russia hands over Mi-35 combat helicopters to Togo], *Krasnaya Vesna*, December 13, 2022, <https://rossaprimavera.ru/news/d2fba07e>.

⁵⁹ Regarding Mali, see "Russia vetoes UN resolution to extend sanctions, monitoring in Mali," *Al Jazeera*, August 31, 2023, <https://www.aljazeera.com/news/2023/8/31/russia-vetoes-un-resolution-to-extend-sanctions-monitoring-in-mali>. Regarding the CAR, see "Rossiya prizvala OON k reshitel'nyim shagam po otmene oruzheinogo embargo v otnoshenii CAR" [Russia called on the UN to take decisive steps to lift the arms embargo against the Central African Republic], *Tass*, February 21, 2023, <https://tass.ru/politika/17111171>.

UAV industry, has noted, while Russian allies such as the Central African Republic (CAR) may opt for cheaper drones such as the Orlan variant, Moscow will probably struggle to find African customers for its more expensive drones, given stiff competition from well-established drone producers such as China, Israel, Turkey, and the United States.⁶⁰

Following the invasion of Ukraine, Russia's arms exports to Latin America did not recover from their previous dramatic decline. Though Foreign Minister Sergey Lavrov visited Brazil, Venezuela, Nicaragua, and Cuba in the spring of 2023, there was no reporting of any new arms deals being concluded. That said, Russia allegedly supplied Nicaragua with surveillance software to suppress domestic dissent⁶¹ while also engaging in other activities on the continent that have security implications, as will be detailed further below.

To sum up, notwithstanding a continued flow of defense articles from Russia to Global South countries after the invasion of Ukraine, as evidenced by the bills of lading and vessel movement data, Russia faced challenges in maintaining its position as the world's second-largest arms exporter. There is reason to believe that a heightened threat of CAATSA sanctions played a role in thwarting some weapons deals (Egypt, Philippines), especially among smaller states. Anecdotal evidence suggests that the reputational damage suffered by Russian platforms due to their performance in the war against Ukraine dampened enthusiasm among some customers for new deals with Russia. The Ukraine war also reduced the Russian defense industry's ability to fulfill orders for high-end products. That said, several other important factors affecting Russian arms sales predate the Ukraine war. Those include a desire among Russia's customers to diversify acquisition sources and/or develop indigenous industries, and the limited appeal of Russian arms sales pitches in Latin America due to budgetary pressures and Chinese competition.

Finally, the Ukraine War produced a new phenomenon: Russia's procurement of considerable quantities of defense goods from countries in the Global South. Since February 2022, Russia has reportedly imported combat drones, artillery shells, and body armor from Iran; begun to use ammunition supplied by Myanmar;⁶² and possibly sought weapons from Egypt and South Africa. It has also attempted to buy back weapon parts it previously exported to India and Myanmar.⁶³ In September 2023, following on the heels of Defense Minister Sergei Shoigu's visit to Pyongyang, DPRK Supreme Leader Kim Jong Un visited Russia to discuss military-defense cooperation. Russia reportedly voiced interest in artillery shells and anti-tank missiles, in addition to weapons already received from the DPRK.⁶⁴

⁶⁰ See Samuel Bendett's analysis on his X feed on July 25, 2023, <https://twitter.com/sambendett/status/1683808348754378752>.

⁶¹ Julieta Pelcastre, "Nicaragua Spies on Its Citizens with Russia's Help," *Diálogo Americas*, April 21, 2023, <https://dialogo-americas.com/articles/nicaragua-spies-on-its-citizens-with-russias-help/>.

⁶² "Russia now uses 120 mm mortar ammunition supplied by Myanmar," *Army Recognition*, July 27, 2023, https://www.armyrecognition.com/defense_news_july_2023_global_security_army_industry/russia_now_uses_120_mm_mortar_ammunition_supplied_by_myanmar.html?utm_content=cmp-true.

⁶³ "Russia Buys Back Military Parts Exported to Asia," *Moscow Times*, June 5, 2023, <https://www.themoscowtimes.com/2023/06/05/russia-buys-back-military-parts-exported-to-asia-a81399>; "Indiiskoe oruzhie vystavlyayut na prodazh" [Indian weapons put up for sale], *Kommersant*, October 19, 2022, <https://www.kommersant.ru/doc/5620436>.

⁶⁴ Edward Wong and Julian E. Barnes, "Kim Jong-un and Putin Plan to Meet in Russia to Discuss Weapons," *New York Times*, September 4, 2023, <https://www.nytimes.com/2023/09/04/us/politics/putin-kim-meeting-russia-north-korea-weapons.html>.

In the coming years, the downward trajectory in Russia's overall weapons exports to countries of the Global South is set to continue. Sales to Latin America will unlikely regain the heights of the 2010s, while major Russian importers will keep diversifying their imports. In terms of supply-side factors, Russia is likely to struggle, particularly in delivering defense articles toward the higher end of its value chain, as it remains under pressure to adapt to restrictions.⁶⁵ It is true that, in a surprise to many Western analysts, Russian missile and tank production levels recovered over the course of 2023 compared to 2022, notwithstanding sanctions and export controls.⁶⁶ Still, these restrictions, coupled with the demands of the Ukraine campaign, will likely force Russia to prioritize war-related weapons production over export-related defense manufacturing.

Against that general backdrop, defense cooperation with sub-Saharan African for helicopters and aircraft may well deepen. At present, for instance, Russia is attempting to rebuild the Malian Air Force. Although the systems it provides are not highly sophisticated, in aggregate they significantly add to Mali's capabilities.⁶⁷ However, barring serious military modernization projects in Russia's partner countries, it is difficult to see sub-Saharan Africa replacing the markets Russia has been slowly losing over the past decade, particularly in Asia.

Before the invasion of Ukraine, Russian observers already recognized that the domestic defense industry was falling behind while other states made advances.⁶⁸ Modern defense ecosystems are also increasingly reliant upon the ability to adapt dual-use civilian technologies. Despite attempts by Russian officials to exploit commercially available systems and foster a defense innovation ecosystem in Russia, mismanagement, challenges to Russia's human capital and technology base, and a poor investment climate have hindered the adoption of new innovations at scale.⁶⁹ The Ukraine war has amplified these problems and further restricted Russia's access to cutting-edge technology from abroad. As one defense analyst put it, having invaded Ukraine, Russia will over time turn into a "second-rate economy with a third-rate technology base."⁷⁰ Russia is presently hoping to make inroads in new areas such as UAV and UCAV systems. It has recently doubled down in the production of technology that proved itself in combat in Ukraine—such as Lancet, Orlan-10, and Orlan-30 UAVs; KUB loitering munitions; and numerous air defense and early warning (EW)

⁶⁵ Max Bergmann et. al., "Out of Stock? Assessing the Impact of Sanctions on Russia's Defense Industry," CSIS, April 2023, https://csis-website-prod.s3.amazonaws.com/s3fs-public/2023-04/230414_Bergmann_Out_Stock.pdf?VersionId=6jfhCP0c13bbmh9bw4Yy2wbpjNnfeJi8.

⁶⁶ Julian E. Barnes, Eric Schmitt and Thomas Gibbons-Neff, "Russia Overcomes Sanctions to Expand Missile Production, Officials Say," *New York Times*, September 13, 2023, <https://www.nytimes.com/2023/09/13/us/politics/russia-sanctions-missile-production.html>.

⁶⁷ Alan Dron, "Russians dominate Mali's air rebuild," *Times Aerospace*, March 13, 2023, <https://www.timesaerospace.aero/features/defence/russians-dominate-malis-air-rebuild>.

⁶⁸ "Dorogoi prolet: Pochemu Rossiya riskuet ostat'sya bez Su-57 i Armaty" [Expensive flight: Why Russia risks being left without the Su-57 and Armata], *Lenta.Ru*, August 9, 2018, <https://lenta.ru/articles/2018/08/09/deadweapons/>.

⁶⁹ Issues with human capital in the Russian defense industry are well documented in specialty Russian language academic discussions. For an English language translation exploring attempts to reform training programs for the defense base, see Elena Dyundik et. al., "Development of human capital in the military industrial complex of Russia in the context of digital transformation," *E3S Web of Conferences*, Vol. 217, 2020, <https://www.proquest.com/openview/43ce6c2e446f0ab8186d113fe164d4ca/1?pq-origsite=gscholar&cbl=2040555>.

⁷⁰ Defense expert at a virtual, off-the-record expert roundtable on Russian arms sales, May 2023.

systems—and has advertised systems to prospective clients. It remains to be seen, however, whether Russian exports can compete against well-established drone producers.⁷¹

Turning to demand-side factors, in continuation of trends preceding the Ukraine war, many of Russia's Global South customers will continue to diversify their purchases among major and smaller suppliers while also strengthening their own defense industrial capacities. The threat of CAATSA sanctions, Russia's restricted access to international payment mechanisms, and the performance of Russian weapons systems in Ukraine could further combine to decrease the attractiveness of Russian arms.

Amid this broader trajectory, Russia's legacy defense relationships with countries such as India and Vietnam will most probably continue to see flows of defense articles for a considerable period, particularly for spare parts and maintenance. Inertia, the heavy use of Soviet-era designs, and the difficulties in adapting existing Russian weapon platforms with newer, non-Russian equipment will compel such countries to diversify away from Russian weapons in phases. Over the short term, Russia's systematic destruction of the Ukrainian defense industry may also open additional opportunities for Moscow in Global South countries (such as India) where Ukraine and Russia previously competed for export markets for aerospace components.⁷²

Assuming protracted confrontation with and isolation from the West, Russia will likely deepen its defense relationships with rogue states including the DPRK, Iran, Mali, and Myanmar, with several implications: First, Russia's import of defense articles from some of these states for the war effort in Ukraine is set to continue and expand. Second, such reliance will most probably render Russia more defiant in defending these states at the United Nations and other relevant fora against efforts to mitigate sanctions evasion or other activities of proliferation concern. Third, the deepening of mutual defense assistance with these states may lead to the emergence of defense ecosystems that could see mutual material support, as well as knowledge diffusion in areas including sanctions evasion and adaptation of dual-use goods for defense production. During Kim Jong Un's visit to Russia, both sides reportedly discussed cooperation in a range of areas, with Pyongyang seeking support on advanced satellite technology and nuclear-powered submarines, in return for Russia procuring a steady stream of ammunition for the war in Ukraine.⁷³

⁷¹ See Samuel Bendett's analysis on his X feed on July 25, 2023.

⁷² Ruslan Pukhov, "Sostoyanie i razvitie bronetankovoi promyshlennosti Ukrainy posle 2014 goda" [The state and development of the armored industry of Ukraine after 2014], *CAST*. For more in the Indian media, see Rahul Bedi, "Russia Invading Ukraine Will Have a Domino Effect on India's Arms Deals," *The Wire*, February 24, 2022, <https://thewire.in/security/russia-invading-ukraine-will-have-a-domino-effect-on-indias-arms-deals>.

⁷³ Around the time of the visit, several Russian experts commented on the areas in which Russia and the DPRK may cooperate, both covertly and overtly. For a selection of such expert commentary, see the author's post on X on September 14, 2023: <https://twitter.com/HannaNotte/status/1702249966670876974>.

3.2 Russian PMCs in the Global South: Preservation and Rebranding

The global footprint of Russian PMCs prior to the invasion of Ukraine

Building on its deployment of the Wagner Group and other Russian PMCs to Syria, Russia consolidated a remarkable mercenary presence, predominantly in African countries, in the years leading up to the Ukraine war. In Syria, Wagner was brought in after Russia's intervention in the country's civil war in 2015 as a main assault force and to reinforce units of local allies—tasks that allowed it to morph into an elite infantry of sorts over time. Working with the GRU (Russia's military-intelligence directorate), it took a leading role in the capture of Palmyra in March 2016 but also descended into its first conflicts with the Russian Ministry of Defense.⁷⁴ Wagner lost hundreds of fighters in a bloody clash with U.S. forces near Deir-Ezzor in northeast Syria in February 2018. Like other Russian PMCs present in Syria—such as the Slavonic Corps, present from 2013, or the “Shield” PMC—Wagner also signed contracts with the Syrian government for commercially attractive ventures such as guarding gas and oil fields and phosphate mines.⁷⁵

Wagner started operating in Libya from 2015, keeping a relatively low profile as it engaged in training, military advice, and demining services for the Libyan National Army (LNA). Its role became more prominent when Wagner took on an active combat role to support the LNA's stalled advance toward Tripoli, the Libyan capital, in 2019. That escalation, among other factors, brought Turkey into the conflict on the side of Government of National Accord. After the conclusion of a cease-fire in 2020, Wagner's activities centered around oil facilities in central Libya and in the country's east. Wagner-affiliated companies secured contracts across the country in a range of sectors, including security provision for energy and mining installations. According to local sources, Wagner operatives also built spheres of influence with local communities and smuggling networks in the southern border regions of Libya.⁷⁶ In recent years, Wagner used its Libyan bases as a logistics hub for activities elsewhere in Africa.

Besides Libya, Wagner consolidated a presence in at least three additional African states prior to the invasion of Ukraine: the CAR, Mali, and Sudan. Depending on context, its services ranged from military training and advice, via personal security for leaders and the guarding of natural resources and mines, to counterinsurgency. Wagner arrived in the CAR—which later came to be considered its most successful African venture—in 2018 with a small contingent of military instructors. Its mission shifted after an attempted coup in 2020 into a larger counterinsurgency operation. Since then, CAR President Faustin-Archange Touadéra and the armed forces have leaned heavily on Wagner, which has also consolidated its presence in the country's mining, timber, and beverage sectors. In Mali, Wagner became engaged after the military junta's pivot away from traditional international partners in 2021 and has been accused of complicity in several instances of human rights abuses since then. It also built a presence in Sudan prior to the Ukraine war, driven by an interest in the country's gold mines, and variably supported both General Mohamed Hamdan Dagalo (“Hemedti”),

⁷⁴ Tatiana Stanovaya, “Man vs. Myth: Is Russia's Prigozhin a Threat or Asset to Putin?,” Carnegie Endowment for International Peace, February 23, 2023, <https://carnegieendowment.org/politika/89008>.

⁷⁵ “‘Shhit’: chto izvestno o novoi chastnoi voennoi kompanii” [“Shield’: what is known about the new private military company], TV Rain, July 29, 2019, https://tvrain.tv/teleshov/here_and_now/shield-490512/.

⁷⁶ Mohamed Eljarh, “Russia's Wagner activities expanding in Libya despite growing Western scrutiny,” *Al-Monitor*, March 19, 2023, <https://www.al-monitor.com/originals/2023/03/russias-wagner-activities-expanding-libya-despite-growing-western-scrutiny>.

leader of the Rapid Support Forces (RSF) paramilitary unit, and the Sudanese Armed Forces led by General Abdel Fattah al-Burhan.⁷⁷

What characterized Wagner's operations across the board, notwithstanding considerable differences in mission sets and related operational risks, was a reliance on the Russian Ministry of Defense for equipment, logistics, and materiel. While Libya, the CAR, Mali, and Sudan represented the focal points of Russia's PMC activity in the Global South before 2022, Wagner also attempted to make inroads into Mozambique (unsuccessfully so in 2019) and Mexico (haphazardly in 2020),⁷⁸ while also coming to the fore in Venezuela.⁷⁹ The Ukrainian open-source intelligence agency Molfar claims that Wagner has—at one point or the other, and to varying degrees—also operated in Botswana, Burundi, the Democratic Republic of the Congo (DRC), Lesotho, Madagascar, and Nigeria. Molfar counts a total of 36 Russian PMCs other than Wagner (not all of them still active) with modest overseas activities over recent years.⁸⁰

The global footprint of Russian PMCs since the invasion of Ukraine

In light of its combat employment in Ukraine after February 2022, the Wagner Group underwent a remarkable adaptation and expansion.⁸¹ Its business in Global South countries was not materially affected by those changes. One year into the war, in March 2023, Wagner retained an estimated 3,500-4,500 mercenaries in Africa⁸² and Prigozhin, in his frequent and often flamboyant appearances on social media, repeatedly signaled the group's enduring interest in the continent.⁸³ It is important to emphasize that Wagner's Africa and Middle East operations always remained substantially separate from its Ukraine operations, relying on able and experienced field commanders overseeing a manageable number of highly trained fighters. In contrast, Wagner expanded rapidly in Ukraine with the employment of tens of thousands of untrained convicts.

After February 2022, neither Syria nor Libya saw significant reductions in deployed Wagner forces.⁸⁴ The ballooning Telegram presence of Wagner-affiliated channels was heavily

⁷⁷ Nima Elbagir et al., "Russia is plundering gold in Sudan to boost Putin's war effort in Ukraine," CNN, July 29, 2022, <https://edition.cnn.com/2022/07/29/africa/sudan-russia-gold-investigation-cmd-intl/index.html>.

⁷⁸ Erin Banco, Sarah Anne Aarup, and Anastasiia Carrier, "Inside the stunning growth of Russia's Wagner group," *Politico*, February 28, 2023, <https://www.politico.com/news/2023/02/18/russia-wagner-group-ukraine-paramilitary-00083553>.

⁷⁹ Andrew Roth, "Russian mercenaries reportedly in Venezuela to protect Maduro," *The Guardian*, January 25, 2019, <https://www.theguardian.com/world/2019/jan/25/venezuela-maduro-russia-private-security-contractors>.

⁸⁰ "Catalog of Russian PMCs: 37 private military companies of the Russian Federation," Molfar, <https://molfar.com/en/blog/catalog-of-russian-pmcs>.

⁸¹ Wagner changed considerably after the Ukraine invasion. Against the backdrop of its employment in Ukraine, the group went on an aggressive recruitment spree across Russian penal colonies, acquired a more prominent public profile in Russia, and exerted efforts toward receiving greater entitlements and benefits.

⁸² Declan Walsh, "A 'New Cold War' Looms in Africa as U.S. Pushes Against Russian Gains," *New York Times*, March 19, 2023, <https://www.nytimes.com/2023/03/19/world/africa/chad-russia-wagner.html>. Other sources put the number higher, at about 6,000 Wagner fighters. Virtual, off-the-record roundtable with analysts studying the Wagner Group, March 2023.

⁸³ See, for instance, a post on the "Orchestra Wagner" Telegram channel on April 29, 2023, https://t.me/orchestra_w/6390.

⁸⁴ In Syria, Wagner's presence had already been reduced in recent years to an estimated 250-450 personnel. Suleiman Al-Khalidi and Maya Gebeily, "Syria brought Wagner fighters to heel as mutiny unfolded in Russia," Reuters, July 7, 2023, <https://www.reuters.com/world/syria-brought-wagner-group-fighters-heel-mutiny-unfolded-russia-2023-07-07/>. On Wagner's presence in Libya, one year into the Ukraine invasion, see Mohamed Eljarh, "Russia's Wagner activities expanding in Libya despite growing Western scrutiny."

focused on the war in Ukraine and Wagner's employment around Propasna (spring 2022) and Bakhmut (winter 2022-23). Whatever social media content was dedicated to Wagner's Africa business was scarce and heavily tilted in favor the CAR,⁸⁵ where Russian officials admitted to maintaining just under 2,000 military "instructors."⁸⁶ After the invasion of Ukraine, Wagner reportedly started working on new mines in the CAR, to secure new sources of revenue, and its business benefited from transfers of military equipment from Wagner operations in Libya and Sudan.⁸⁷

In Sudan, meanwhile, Wagner's post-Ukraine invasion business was interrupted by the outbreak of renewed civil war in spring 2023. At that time, Russian diplomats became preoccupied with ensuring the safety of Russian embassy staff and civilians in and around Khartoum.⁸⁸ Though Prigozhin denied any direct involvement in the conflict,⁸⁹ media reporting and the U.S. government have alleged Wagner's support for the Hemedti-led RSF, including with surface-to-air missiles.⁹⁰ In one of the clearest acknowledgments to date by a Russian official of Wagner's presence in Sudan, Lavrov said in April 2023 that Sudan had the "right to use the services of PMC Wagner," calling it a "private company."⁹¹ Notwithstanding Wagner's documented support for the RSF, Moscow eschewed a hard alliance with Hemedti and made sure to maintain favorable relations with General al-Burhan as well, in order to ensure continued influence in the country no matter the outcome of the civil war.⁹² To Sudan's west, meanwhile, Chad became a source of growing concern one year into the Ukraine war. U.S. officials leaked information on an alleged effort led by Wagner in February 2023 to recruit Chadian rebels and establish a training site for 300 fighters in the CAR, as part of a plot to topple the Chadian government.⁹³ Around the same time, hints of Wagner's interest in Burkina Faso emerged, after the junta there had ordered the departure of some 400 French special forces in January 2023.⁹⁴

⁸⁵ Wagner-affiliated Telegram channels regularly posted from their CAR operations, with videos purportedly showing Wagner training local police (see https://t.me/orchestra_w/5504) or alleged public shows of support for Wagner (see https://t.me/orchestra_w/6304).

⁸⁶ "Russian envoy says 1,890 Russian 'instructors' are in CAR," *Al Jazeera*, February 3, 2023, <https://www.aljazeera.com/news/2023/2/3/russian-envoy-says-1890-russian-instructors-in-central-african-republic-ria>.

⁸⁷ Abdulkader Assad, "Wagner transfers aircrafts and military equipment from Libya, Sudan to CAR," *The Libya Observer*, May 15, 2023, <https://libyaobserver.ly/inbrief/wagner-transfers-aircrafts-and-military-equipment-libya-sudan-car>. At the same time, other reporting suggested the opposite—transfers of military equipment from the CAR to Sudan: https://twitter.com/ChrisO_wiki/status/1659630370399109135.

⁸⁸ Early into the fighting in spring 2023, Russian citizens found themselves blocked in a church in Khartoum and had to be evacuated. Russia kept its embassy in Khartoum open for months but announced its evacuation in early August 2023 due to the deteriorating security situation.

⁸⁹ "Prigozhin zayavil, chto v Sudane seychas net ni odnogo boitsa ChVK 'Vagner'" [Prigozhin said that there is not a single fighter from the Wagner PMC in Sudan now], Tass, April 18, 2023, <https://tass.ru/politika/17551439>.

⁹⁰ Nima Elbagir, Gianluca Mezzofiore, Tamara Qiblawi and Barbara Arvanitidis, "Exclusive: Evidence emerges of Russia's Wagner arming militia leader battling Sudan's army," *CNN*, April 21, 2023, <https://edition.cnn.com/2023/04/20/africa/wagner-sudan-russia-libya-intl/index.html>.

⁹¹ "Russia's Lavrov: Sudan has the right to use Wagner Group," Reuters, April 25, 2023, <https://www.reuters.com/article/ukraine-crisis-un-lavrov-idAFS8N31Z007>.

⁹² Samuel Ramani, "As fighting in Sudan rages, Russia's primary goal is to ensure authoritarian rule," Middle East Institute, May 3, 2023, <https://www.mei.edu/publications/fighting-sudan-rages-russias-primary-goal-ensure-authoritarian-rule>.

⁹³ Walsh, "A 'New Cold War' Looms in Africa as U.S. Pushes Against Russian Gains."

⁹⁴ Sam Mednick, "After Burkina Faso ousts French, Russia's Wagner may arrive," Associated Press, April 7, 2023, <https://apnews.com/article/burkina-faso-russia-wagner-jihadi-02d9235279f0991c6b6ad3ebb4d3e546>. While some analysts contend that Wagner is already present in the country, based on information obtained from local sources, there is no proof in the open sources. In May 2023, Burkina Faso's interim president, Ibrahim

In sustaining its Africa business, Wagner benefited from a significant decline in media freedom in the Sahel. Wagner-affiliated trolls—some of them situated in Ghana or Nigeria⁹⁵—stepped up their game after the invasion of Ukraine, railing against French influence and Europe’s colonial past in Africa ever more aggressively, in line with the Russian state’s broader (“anti-neocolonial”) war of narratives waged in Africa. In their efforts, they were aided by pan-African influencers—such as Kémi Séba or Natalie Yamb—who emerged as powerful amplifiers of Russian disinformation about the Ukraine war and as supporters of Russia’s role in Africa. Wagner’s messaging, official Russian messaging,⁹⁶ pro-regime media in states such as the CAR, ventures between African media outlets and Russia’s *RT*,⁹⁷ and influencers such as Séba and Yamb⁹⁸—all these elements have combined to form a media ecosystem of sorts, one in which pro-Russian messages are amplified and civic space for genuine debate is being reduced.⁹⁹ At the same time, NGO workers and media experts with on-the-ground experience in the Sahel have cautioned that Wagner’s appeal should neither be “over-intellectualized,” nor be seen as the core driver of conflict in the region.¹⁰⁰

Wagner’s overseas business in the period between Prigozhin’s attempted mutiny and death

In the summer of 2023, Prigozhin’s attempted mutiny, followed by his death in a plane crash in Russia two months later, set the scene for a major reconfiguration of Russia’s PMC business in the Global South.¹⁰¹

During the eight weeks between the two events, the Russian government took several measures intended to bring Wagner operatives and their activities under its control. Meeting Wagner fighters on June 29, a few days after the attempted mutiny, President Putin offered them the chance to continue serving under a new structure headed by Wagner’s chief of staff Andrei Troshev (“Sedoy”),¹⁰² who, however, failed to encourage men to move to the new structure. (That might have been because, as some analysts argued, they remained loyal to Prigozhin, who had cultivated a considerable personality cult around himself, and because they hoped that Prigozhin would remain able to finance and protect them.) Wagner’s

Traore, called Russia a key strategic ally but denied that Russian mercenaries were supporting Burkinabe forces in their fight against Islamist armed groups. “Burkina Faso interim leader hails Russia as a strategic ally,” Reuters, May 5, 2023, <https://www.reuters.com/world/burkina-faso-interim-leader-hails-russia-strategic-ally-2023-05-05/>.

⁹⁵ Virtual, off-the-record roundtable with analysts studying the Wagner Group.

⁹⁶ Russian embassies on the African continent are extremely active on social media.

⁹⁷ Elian Peltier, Adam Satariano and Lynsey Chutel, “How Putin became a hero on African TV,” *New York Times*, April 18, 2023, <https://www.nytimes.com/2023/04/13/world/africa/russia-africa-disinformation.html>.

⁹⁸ Séba and Yamb attended both the recent Russia-Africa summit in St. Petersburg (where Yamb gave an interview to *RT*) and the BRICS summit in Johannesburg in August 2023. (Here is a Facebook post by Yamb, showing herself alongside Séba: <https://www.facebook.com/watch?v=235527982340033>.)

⁹⁹ For an example of this ecosystem, consider Afrique Media TV, a Cameroonian outlet which is associated with Prigozhin via AFRIC, and directed by Kémi Séba. See Jack Margolin’s post on X, May 10, 2023, https://twitter.com/Jack_Mrgln/status/1656321927286255624.

¹⁰⁰ See the in-depth discussion in “The Wagner Group in Africa: Myth vs. Reality,” Resistance Bureau, July 26, 2023, <https://www.youtube.com/watch?v=5P6T2uc9yJE>.

¹⁰¹ As military analyst Rob Lee has argued, the mutiny on June 23-24, 2023, was the result of a festering, factional dispute between Prigozhin and the Defense Ministry. Its immediate catalyst was an announcement that all PMCs and volunteer units would have to sign contracts with the ministry.

¹⁰² Troshev is believed to have been the main liaison between Prigozhin and the Defense Ministry during the war in Ukraine. Mary Ilyushina, Francesca Ebel, Rachel Chason, and Claire Parker, “Before Prigozhin plane crash, Russia was preparing for life after Wagner,” *Washington Post*, August 28, 2023, <https://www.washingtonpost.com/world/2023/08/25/wagner-group-successors-mercenary-companies/>.

leadership moved a sizable contingent of fighters to Belarus and continued to recruit for its African business,¹⁰³ while Prigozhin also remained very active on social media, following a brief post-mutiny hiatus.

Still, Russian officials were dispatched to Wagner’s theaters of deployment to lay the groundwork for transferring its operations under tighter control by the state. One sign of this drive was the appearance of the deputy head of the Main Directorate of Russia’s General Staff, Andrei Averyanov, at the Russia-Africa summit in late July. Moreover, in the period leading up to Prigozhin’s death, several other PMCs with close links to the Russian Defense Ministry stepped up their recruitment for African operations, among them “Redut” and “Konvoy.”¹⁰⁴ Besides those efforts abroad to put Wagner on a tighter leash, the Kremlin also cracked down on the group domestically, raiding its offices and blocking its social media channels.¹⁰⁵ There is evidence that Prigozhin was aware of the government’s drive to usurp his business and engaged in a competing effort—which entailed trips to his various African clients—to prevent the seizure of his networks.

In Syria, Prigozhin’s attempted mutiny had immediate reverberations, with Syrian authorities and Russian military commanders taking a series of swift measures against local Wagner operatives.¹⁰⁶ Wagner forces were reportedly given a choice between signing new contracts with the Defense Ministry or leaving Syria. A few weeks later, Deputy Defense Minister Yunus-Bek Yevkurov met with President Bashar al-Assad in Damascus, where, according to local news, he asked the Syrian government to oust Wagner by the end of September.¹⁰⁷ In Libya, where the LNA had already become increasingly wary of Wagner’s latitude prior to the attempted mutiny,¹⁰⁸ a Russian military delegation including Yevkurov and Averyanov held talks with LNA chief Haftar on August 22, reportedly announcing that the Defense Ministry would henceforth oversee Russia’s engagement in Libya.¹⁰⁹ Yet, there were no significant movements of Wagner forces into or out of the country or changes to their activities at that time. In a sign of potentially growing boldness by forces opposed to Wagner’s Libyan presence, drones (of unknown origin) struck at Al-Khadim and Al-Kharruba bases in eastern Libya—routinely used by Wagner to transfer weapons and fighters—within days of the attempted mutiny.

¹⁰³ “ChVK ‘Wagner’ prodolzhaet nabor naemnikov v Rossii, vopreki zayavleniyam Prigozhina” [PMC ‘Wagner’ continues to recruit mercenaries in Russia, contrary to Prigozhin’s statements], *istories*, August 2, 2023, <https://istories.media/news/2023/08/02/chvk-vagner-prodolzhaet-nabor-naemnikov-v-rossii-vopreki-zayavleniyam-prigozhina/>.

¹⁰⁴ For an example of a recruitment ad, see <https://t.me/convoywe/2040>. “Konvoy” was founded by the head of the Russian administration in Crimea, Sergei Aksyonov, and is closely associated with the Ministry of Defense.

¹⁰⁵ Benoit Faucon et al., “The Last Days of Wagner’s Prigozhin,” *Wall Street Journal*, August 24, 2023, <https://www.wsj.com/world/russia/prigozhin-wagner-plane-crash-last-days-2c44dd5c>.

¹⁰⁶ Al-Khalidi and Gebeily, “Syria brought Wagner fighters to heel as mutiny unfolded in Russia.”

¹⁰⁷ “Russia calls on the Assad regime to expel Wagner from Syria” (in Arabic), *El Baladi*, August 27, 2023, <https://baladi-news.com/ar/articles/96596/%D8%B1%D9%88%D8%B3%D9%8A%D8%A7-%D8%AA%D8%B7%D8%A7%D9%84%D8%A8-%D9%86%D8%B8%D8%A7%D9%85-%D8%A7%D9%84%D8%A3%D8%B3%D8%AF-%D8%A8%D8%B7%D8%B1%D8%AF%D9%81%D8%A7%D8%BA%D9%86%D8%B1-%D9%85%D9%86-%D8%B3%D9%88%D8%B1%D9%8A%D8%A7%20-%20>.

¹⁰⁸ Mohamed Eljarh, “Russia maintains Libya role after Wagner’s mutiny, Prigozhin’s death,” *Al Monitor*, September 9, 2023, <https://www.al-monitor.com/originals/2023/09/russia-maintains-libya-role-after-wagners-mutiny-prigozhins-death>. See also Libyan analyst Anas El Gomati, quoted in Mary Ilyushina et al., “Before Prigozhin plane crash, Russia was preparing for life after Wagner.”

¹⁰⁹ Mohamed Eljarh, “Russia maintains Libya role after Wagner’s mutiny, Prigozhin’s death.”

In the CAR, rumors of Wagner forces leaving the country were quickly replaced by reports that suggested that there had merely been a “rotation.”¹¹⁰ Indeed, in mid-July, new Wagner fighters arrived in the CAR capital of Bangui to oversee a referendum scheduled for July 30.¹¹¹ Still, the Kremlin signaled a desire for the CAR leadership to distance itself from Prigozhin personally. Though the latter made an appearance at the Russia-Africa summit in late July, President Touadéra declined to take a photograph with the Wagner chief.¹¹² Meanwhile, Mali—of which Lavrov had said immediately after the mutiny that Russian “instructors” would continue to work there¹¹³—saw less dramatic post-mutiny movement than Libya or the CAR. In early July, Mali’s foreign minister declared that his government was communicating exclusively with the Russian state¹¹⁴ and would continue the cooperation. In Sudan, the two months between Prigozhin’s attempted mutiny and death were characterized by a further deterioration of the security situation amid continued civil war, which prompted the Russian Foreign Ministry to signal its readiness to help “end the crisis” on the one hand, and to evacuate its embassy in Khartoum on the other.¹¹⁵ There was no significant movement by Wagner forces, which had been largely in a “wait and see” mode for months due to the ongoing fighting.

Elsewhere in Africa, the Russian delegation including Yevkurov and Averyanov reportedly visited Burkina Faso and Mali as well, according to state media in both countries.¹¹⁶ Meanwhile, Niger’s coup on July 26 raised the specter of Wagner making a play for an additional African stronghold. Wagner-affiliated Telegram channels immediately cheered the coup as an opportunity to extend the group’s influence in the Sahel by fostering ties with the new military leadership. While there is broad consensus among analysts that Wagner was not implicated in the coup itself, rumors swirled in early August, saying that a Wagner team had entered Niamey, Niger’s capital, coming from Mali.¹¹⁷ Such information was never confirmed, however, raising the possibility that the Niger junta might have attempted to create speculation and illusions surrounding Wagner’s entry in order to gain leverage vis-à-vis outside powers opposed to the coup.

¹¹⁰ “Central African Republic Says Russian Wagner Troops Rotating, Not Departing,” *RFE/RL*, July 9, 2023, <https://www.rferl.org/a/russia-wagner-troops-car/32495401.html>.

¹¹¹ “Wagner troops arrive in Central African Republic ahead of referendum,” Reuters, July 17, 2023, <https://www.reuters.com/world/africa/wagner-troops-arrive-central-african-republic-ahead-referendum-2023-07-17/>.

¹¹² Instead, Prigozhin was being photographed with Touadéra’s head of protocol. See Max Seddon’s post on X: <https://twitter.com/maxseddon/status/1684502548579852290>.

¹¹³ “Wagner will continue its operations in Mali and the CAR (Lavrov)” (in French), *aBamako*, June 26, 2023, <http://news.abamako.com/h/284183.html>.

¹¹⁴ “Abdoulaye Diop, Mali’s chief diplomat: ‘Mali’s problem is not Wagner’” (in French), *Malijet*, July 12, 2023, https://malijet.com/les_faits_divers_au_mali/lettres_ouvertes_mali/280127-abdoulaye-diop%2C-chef-de-la-diplomatie-malienne-%C2%AB-le-probl%C3%A8me-du-.html.

¹¹⁵ “Russia is willing to support efforts to end Sudanese crisis, says Lavrov,” *Sudan Tribune*, June 29, 2023, <https://sudantribune.com/article274751/>; “Russian Foreign Ministry announces evacuation of Russians from Sudan,” *Interfax*, August 1, 2023, [https://interfax.com/newsroom/top-stories/93205/#:~:text=Aug%201%20\(Interfax\)%20%2D%20The,the%20Russian%20Foreign%20Ministry%20said.](https://interfax.com/newsroom/top-stories/93205/#:~:text=Aug%201%20(Interfax)%20%2D%20The,the%20Russian%20Foreign%20Ministry%20said.)

¹¹⁶ Anton Troianovski, Declan Walsh, Eric Schmitt, Vivian Yee, and Julian E. Barnes, “After Prigozhin’s Death, a High-Stakes Scramble for His Empire,” *New York Times*, September 8, 2023, <https://www.nytimes.com/2023/09/08/world/europe/prigozhin-wagner-russia-africa.html>.

¹¹⁷ For example: “Wagner Group members enter Niger,” *Albawaba*, August 5, 2023, <https://www.albawaba.com/node/wagner-group-members-enter-niger-1529302>.

Quo vadis, Wagner?

The future of Wagner and other Russian PMCs in the Global South following Prigozhin's death remains difficult to predict. As of mid-September 2023, Wagner's Council of Commanders had not nominated a new leader—despite the availability of several capable individuals—possibly because of pressure from the Russian Defense Ministry. The council has generally been tight-lipped in commenting on the group's future, mostly calling on its followers on social media to refrain from disseminating “disinformation.” Given the Russian military's constraints in projecting power beyond the Ukrainian battlefield, it will be hard-pressed to take over, let alone replace, Wagner's African businesses in their entirety. At the same time, against the backdrop of its heightened focus on Africa, the Kremlin will probably want to keep up appearances of “business as usual” to the extent possible and will not want to be seen as abandoning its partners. Moscow also remains interested in the commercial opportunities that Wagner's theaters of operation have to offer.

Assuming that Russia intends to retain its PMC business in Africa, there are several conceivable scenarios for what might *functionally* happen to the Wagner Group:

A nationalized, semi-official Wagner. It is conceivable that the Wagner Group will survive its founders, given the high number of talented field commanders still representing the military side of the PMC.¹¹⁸ It might be in the government's interest to keep Wagner intact as much as possible, in order to ensure continuity of operations in Africa. Still, the Defense Ministry likely wishes to see the group diminished to become more like other Russian PMCs, which have always been closely controlled by the security services. It is hard to see a future Wagner Group enjoying the same level of trust by, logistical support of, and access to the Defense Ministry that it enjoyed in the past. Though Wagner's field commanders differentiated themselves from competing PMCs with considerably greater combat experience, they were always dependent on the Russian military for equipment and logistics. If these commanders (and the forces they direct) want to see continued salary payments, as well as equipment and other support, they might begrudgingly accept greater state control. Given the emphasis of heads of state on their relationships with the Russian state (as opposed to Wagner), African countries are also unlikely to object to a nationalized Wagner.¹¹⁹

This scenario would ensure the greatest degree of continuity in Wagner's ventures, though incentive structures, command, and leadership would change. It would, however, place a significant administrative burden on whichever Russian actor assumes the reins. As Kimberley Marten notes, the Defense Ministry probably does not have the bandwidth to control commercial guard forces or manage their contracts with foreign governments, given the war in Ukraine.¹²⁰ In Africa, Wagner's operations include activities as diverse as guarding mines, smuggling gold, and running breweries—and Russian military officers likely

¹¹⁸ Those field commanders include, among others, Alexander Kuznetsov (“Ratabor”), Boris N. (“Zombie”), Anton Yelizarov (“Lotus”), and Ivan Maslov.

¹¹⁹ Fidèle Gouandjika, a senior adviser to Touadéra, said of Prigozhin's death: “It's sad news, he saved democracy so the country is in mourning. But for us it changes absolutely nothing... We'll continue to have Wagner on the ground thanks to our agreement with the Kremlin.” Max Seddon, Aanu Adeoye, Andres Schipani, and Heba Saleh, “Wagner's lucrative African operations thrown into post-Prigozhin limbo,” *Financial Times*, August 25, 2023, <https://www.ft.com/content/0476123a-b726-413b-9c70-0ba1e480fa0f>.

¹²⁰ Kimberley Marten, “Why the Wagner Group Cannot Be Easily Absorbed by the Russian Military – and What That Means for the West,” *Russia Matters*, September 1, 2023, <https://www.russiamatters.org/analysis/why-wagner-group-cannot-be-easily-absorbed-russian-military-and-what-means-west>.

lack the skills and local relationships needed to manage such a diverse range of operations. The *spetsnaz* forces might be better placed, given their greater flexibility and experience with mercenary-type tasks, but they are similarly focused on Ukraine.¹²¹

Fragmentation. It is also possible that Wagner will not survive as a unitary organization. Its operations could be divvied up, with different parts absorbed by Russian oligarchs eager to get into the mercenary business and by various arms of the Russian military and intelligence services.

Replacement by, or absorption into, other PMCs. While the process of luring Wagner fighters into the ranks of PMCs loyal to the government had proven difficult after the attempted mutiny, Prigozhin's death may change the dynamics. It is conceivable that PMCs "Redut," "Konvoy," and others will take over some of Wagner's African ventures, though they have historically performed lower-risk tasks, are less well regarded in the PMC community, do not have the same combat experience, and cannot easily replicate the local networks and relationships with security forces that Wagner has cultivated in states such as Libya and the CAR.¹²²

In short, since neither Russian state structures nor other PMCs are well-suited to take on Wagner's existing roles abroad, there is no easy fix. It is therefore likely that new ownership and command and control arrangements will take time to crystallize. It is also conceivable that the final result will be a combination of the above scenarios—for instance, with the GRU taking control of Wagner's current military operations, but with other GRU-affiliated PMCs phasing themselves into parts of those operations over time.

As for the *geographic* scope of Russia's future PMC activity, it seems highly likely that a semi-official Wagner, perhaps augmented by other GRU-affiliated PMCs, will retain a presence in its core theaters of operation. In Syria, where the regular Russian military has its most robust presence beyond Ukraine, Moscow likely has the leverage to force Wagnerites to sign regular contracts—and to do without the PMC altogether, if need be.¹²³ The situation is different in Libya, which was always "contractor territory,"¹²⁴ making personnel changes and a reconfiguration of Wagner more complicated. Since Russia, having recently dispatched a new ambassador to Tripoli, seems intent on "institutionalizing" its military presence in the country, it is extremely unlikely to leave, however.¹²⁵ Given that the CAR leadership has become highly dependent on Wagner, Russia's PMC presence in that country is also set to continue, in whatever incarnation.¹²⁶ Mali's junta seems similarly intent on keeping a Russian PMC presence of sorts, given its continuing raids on jihadis in a manner that Western states

¹²¹ Ibid.

¹²² For a fuller treatment of "Redut" and "Konvoy," see Jack Margolin, "The New Russian Mercenary Marketplace," *Riddle*, August 21, 2023, <https://ridl.io/the-new-russian-mercenary-marketplace/>.

¹²³ In mid-September 2023, Wagner-linked sources reported that there was a dangerous standoff between Wagner and the Russian armed forces at Hmeymim air base over the Defense Ministry's refusal to allow a Wagner plane carrying Syrian mercenaries from Libya to land. If true, this incident would confirm the Russian military's significant leverage over Wagner in Syria. See: Leonid Ragozin's post on X, September 13, 2023: <https://twitter.com/leonidragozin/status/1701850883695301094>.

¹²⁴ John Lechner and Sergey Eledinov, "Now Prigozhin is gone, what happens to Wagner?," *Open Democracy*, August 30, 2023, <https://www.opendemocracy.net/en/odr/yevgeny-prigozhin-pmc-wagner-group-russia-ministry-defence-sergey-shoigu/>.

¹²⁵ Off-the-record conversation with a source from eastern Libya, August 2023.

¹²⁶ Seddon et al., "Wagner's lucrative African operations thrown into post-Prigozhin limbo."

have deemed incompatible with the U.N. mandate and are therefore not going to support.¹²⁷ Confirmation of a Russian presence in Burkina Faso would also not come as a surprise, given the pro-Russian tilt of Burkinabè officials.¹²⁸ At the recent Russia-Africa summit, Ibrahim Traoré, the junta leader of Burkina Faso, stood next to President Putin in the group photograph and effusively praised his host, proclaiming that “Russia is family for Africa.”¹²⁹ Benin and the DRC have also both flirted with building closer ties with Russia recently.¹³⁰ Amid bandwidth constraints and the logistical challenges related to reconfiguring Wagner’s business, however, it would be surprising to see Russian mercenaries emerging in these theaters soon.

The most interesting case to watch will be Niger, where the new junta has fueled speculation about Wagner’s entry and where, in the wake of the coup, pro-Russian sentiments were expressed at pro-junta rallies. As Sergey Eledinov and John Lechner note, Russia might end up facing a dilemma in Niger: if the security situation deteriorates, and Moscow declines a request by the junta (or its backers, Burkina Faso and Mali) to intervene, its credibility could suffer. Should it, conversely, put mercenary boots on the ground, Niger would have little cash to pay for such services, and Moscow could also risk fueling jihadist forces and upsetting the regional balance of power.¹³¹ It is not at all clear, however, that such a rational cost-benefit analysis will lead Russia to err on the side of caution, should a window of opportunity present itself.

Should Wagner’s business *functionally* settle into a stable new *modus vivendi*, along one or several of the models outlined above, and should battlefield dynamics in Ukraine allow Russia to free up some resources for overseas ventures, new targets for mercenary activity will likely be chosen according to at least three criteria: First, the target state should be rich in resources that are easily accessible for exploitation, both in terms of logistics and governance;¹³² second, the target state should be receptive to Russia’s presence (unlike Mozambique, where Wagner failed in 2019); and third, Russian PMCs should not be expected to enter a country where China has cultivated a strong economic presence, since Moscow most likely will not want to antagonize Beijing.

¹²⁷ Ibid. Russia, meanwhile, signals continued “counterterrorism” support to Mali: “Kommentarii ofitsial'nogo predstavatelya MID Rossii M.V.Zakharovoi v svyazi s terroristicheskimi atakami v Mali” [Commentary by the official representative of the Russian Foreign Ministry, M.V. Zakharova, in connection with the terrorist attacks in Mali], September 8, 2023, https://mid.ru/ru/foreign_policy/news/1903593/.

¹²⁸ Michael Shurkin, “Don’t Abandon Burkina Faso,” *War on The Rocks*, June 20, 2023, <https://warontherocks.com/2023/06/dont-abandon-burkina-faso/>. For an excellent analysis of Wagner’s prospects in Burkina Faso, see: John Lechner and Sergey Eledinov, “Is Burkina Faso edging closer to the Wagner mercenaries?,” *Open Democracy*, September 25, 2023, <https://www.opendemocracy.net/en/odr/burkina-faso-wagner-sahel-security-jihadist/>.

¹²⁹ For video of the speech, see <https://www.youtube.com/watch?v=O8J5mK7JKMY>.

¹³⁰ “V Benine zayavili o prave Afriki ispol'zovat' ChVK ‘Vagner’ dlya podderzhaniya bezopasnosti” [Benin declared Africa’s right to use the Wagner PMC to maintain security], Tass, March 5, 2023, <https://tass.ru/mezhdunarodnaya-panorama/17201087>; Kristof Titeca, “Is the Democratic Republic of Congo Considering a Pivot to Russia?,” *Lawfare*, March 10, 2023, <https://www.lawfaremedia.org/article/democratic-republic-congo-considering-pivot-russia>.

¹³¹ Sergey Eledinov and John Lechner, “Russia Doesn’t Want a War in Niger,” *Foreign Policy*, August 25, 2023, <https://foreignpolicy.com/2023/08/25/prigozhin-putin-russia-coup-niger/>.

¹³² This would make Kenya, for instance, an unlikely target, given its relatively strong governance structures.

3.3 Other Russian Activities in the Global South: Playing the Long Game

Russian military bases, joint exercises, and other activities before the invasion of Ukraine

Aside from exporting arms and deploying PMCs, Russia engaged in a variety of other activities in Global South countries before the war in Ukraine that can be broadly characterized as being of a military or security-sensitive nature. Those activities included seeking permanent or temporary basing, access, or intelligence outposts, disseminating disinformation, and vaccine diplomacy during the COVID pandemic. Given the broad spectrum of Russian activities that could be characterized as being of import to Western states from a security perspective, the overview below focuses only on those activities most clearly of a military nature. It then describes in greater detail what has changed with Russia's invasion of Ukraine.

In the Middle East, Russia secured direct access to the Mediterranean through permanent air and naval basing in Syria after its intervention in September 2015, allowing it to project power farther into the Middle East than it previously had. It upgraded the Hmeymim airbase, with a view to landing larger aircraft, in 2021. In the same year, Russia deployed Tu-22M3 bombers armed with Kh-22 cruise/anti-ship missiles, as well as MiG-31K interceptors with Kinzhal air-launched ballistic missiles, to Hmeymim for the first time, in what became the most significant display of Russia's ability to project power into the Mediterranean since the fall of the Soviet Union. Prior to the war in Ukraine, Russia typically rotated two Project 636.3 diesel-electric attack submarines, one Project 11356 frigate, and multiple corvettes from the Black Sea Fleet in its Mediterranean naval grouping, while maintaining 10 to 20 fighters and tactical bombers at Hmeymim. In addition, Russia enjoyed access to several other air bases in Syria, including Shayrat, Tiyas, Masyaf, Al-Tabqah, and the Qamishli Airport. Through its permanent presence in Syria, Russia acquired a hub for Russian transport flights to Libya and the Sahel and a base from which to harass NATO aircraft in the region.

In Libya, PMC Wagner gained access to several bases, including Al-Wattiyah, Al-Qardabiyah, Al-Jufrah and Al-Khadim, between 2018 and 2020, maintaining fighter aircraft (MiG-29 and Su-24) and Pantsir air defense batteries.¹³³ It also pursued a naval base in Sudan for years, signing an agreement with the Sudanese authorities in December 2020. The base, located at Port Sudan on the Red Sea coast, was supposed to accommodate 300 Russian troops and up to four navy ships for a period of 25 years, with possible extensions of 10-year periods.¹³⁴ When the Sovereign Council of Sudan indicated a few months later that the deal was being reviewed, Russian officials continued to indicate that the base would be built and President Putin referred the agreement to the Russian State Duma for ratification.¹³⁵ Though Russian-Sudanese ties strengthened after the October 2021 coup in Khartoum, the naval base agreement remained in limbo prior to the Ukraine war, with Sudan's ruling military reviewing the deal.

¹³³ Jalel Harchaoui, "The Pendulum: How Russia Sways its Way to More Influence in Libya," *War on the Rocks*, January 7, 2021, <https://warontherocks.com/2021/01/the-pendulum-how-russia-sways-its-way-to-more-influence-in-libya/>.

¹³⁴ Samy Magdy, "Sudan military finishes review of Russian Red Sea base deal," Associated Press, February 11, 2023, <https://apnews.com/article/politics-sudan-government-moscow-803738fba4d8f91455f0121067c118dd>.

¹³⁵ "Pod sotrudnichestvo podvodyat morskuyu bazu" [A naval base is brought under cooperation], *Kommersant*, July 12, 2021, <https://www.kommersant.ru/doc/4898887>.

In Latin America, Russia's military presence was more scattered and temporary. Moscow regularly sent military trainers and technicians to the region, including to support long-term arms sales contracts—for instance, in Nicaragua, Peru, and Venezuela.¹³⁶ In December 2018 two nuclear-capable Tu160 bombers landed temporarily in Venezuela, the third time in a decade that such aircraft had landed there.¹³⁷ Russia also carried out a variety of small-scale military and naval exercises in the region over the years, docking at seaports and airports in Cuba, Nicaragua, and Venezuela. Just prior to the invasion of Ukraine, the Russian government signaled that it might deploy military forces to Venezuela or Cuba, and it signed a pact to increase military cooperation with the former.¹³⁸ Notwithstanding this flurry of activity, however, Russia's infrastructure for projecting a sustained military threat into the Western Hemisphere remained limited. The same was true for the Asia-Pacific region, where Russia occasionally engaged in joint military exercises with ASEAN states and China, but otherwise did not have a noteworthy presence.¹³⁹

Russian military bases, joint exercises, and other activities since the invasion of Ukraine

The war against Ukraine did not have a significant impact on Russia's basing and presence in Syria. Though Russia reportedly handed over smaller bases to Iranian forces and redeployed a battery of S-300 anti-aircraft missiles to Ukraine, it was able to send reinforcements to Qamishli in Syria's northeast, including Su-34 fighter aircraft and Ka-52 helicopters, in May 2022. It also restored the Al-Jarrah Air Base for joint use with Syrian forces in early 2023.¹⁴⁰ When President Assad visited Moscow in March 2023, he encouraged Russia to add new bases in the country and suggested that Moscow's military presence there become permanent.¹⁴¹

Since March 2023, Russia has intensified its harassment of U.S. forces in northeast Syria, including through unprofessional behavior by the Russian Air Force while interacting with U.S. military aircraft.¹⁴² Russian activities have been part coercive signaling, in light of Russia's difficulties in Ukraine, part upping the ante in Moscow's long-standing policy to eject the United States from Syria. Combining its intermittent military "poking" with a patient political effort to foster Syria's normalization with Turkey and Arab states, Russia hopes, over the medium-term, to create sufficient pressure on the United States to leave Syria, and more generally to sideline Western actors on the Syrian dossier. Viewing itself in a

¹³⁶ Kimberley Marten, "Russian Military and Economic Interests and Influence in Latin America and the Caribbean: Threats, Limits, and U.S. Policy Recommendations," Congressional Testimony to the House Foreign Affairs Subcommittee on Western Hemisphere, Civilian Security, Migration and International Economic Policy, July 20, 2022, <https://docs.house.gov/meetings/FA/FA07/20220720/115002/HHRG-117-FA07-Wstate-MartenK-20220720.pdf>.

¹³⁷ Ibid.

¹³⁸ Evan Ellis, "Russia in the Western Hemisphere: Assessing Putin's Malign Influence in Latin America and the Caribbean."

¹³⁹ "Russia, Southeast Asia conclude first joint naval exercise," Reuters, December 4, 2021, <https://www.reuters.com/world/asia-pacific/russia-southeast-asia-conclude-first-joint-naval-exercise-2021-12-04/>; Dave Johnson, "Vostok 2018: Ten years of Russian strategic exercises and warfare preparation," *NATO Review*, December 20, 2018, <https://www.nato.int/docu/review/articles/2018/12/20/vostok-2018-ten-years-of-russian-strategic-exercises-and-warfare-preparation/index.html>.

¹⁴⁰ "Russia, Syria restore Syrian air base for joint use," Reuters, January 23, 2023, <https://www.reuters.com/world/europe/russia-syria-restore-syrian-air-base-joint-use-2023-01-23/>.

¹⁴¹ "Assad welcomes new Russian bases in Syria after Putin meeting," *Al Jazeera*, March 16, 2023, <https://www.aljazeera.com/news/2023/3/16/assad-will-welcome-new-russian-military-bases-in-syria>.

¹⁴² Jeff Schogol, "The U.S. military is still confronting Russian pilots over Syria," *Task & Purpose*, July 24, 2023, <https://taskandpurpose.com/news/us-military-russian-pilots-syria/>.

systemic and existential confrontation with the West over Ukraine, Moscow is no longer interested in the previous *modus vivendi* with the United States in Syria.

Russia's access to bases in central and eastern Libya has proven similarly durable. Despite some tactical adjustments, the Wagner Group continued to occupy the four military bases that had been under its control since 2020 and maintained fighter aircraft in Libya.¹⁴³ Moscow thereby retained an operational footprint to disrupt Libyan strategic oil installations at will, shuffle Wagner fighters into other African theaters, or pursue other objectives to frustrate U.S. policy. Moscow also signaled its continued interest in Libya in other ways after the invasion of Ukraine, announcing its intention to reopen its embassy in Tripoli and a consulate in Benghazi. Elsewhere in the Middle East and North Africa region, the lack of any joint Russian-Egyptian exercises since the beginning of the Ukraine war (the last joint "Protectors of Friendship" exercise was held in October 2021) might have been indicative of Cairo's caution in light of the West's pressure campaign against Moscow. Warships of Russia's Black Sea fleet have, however, stopped over at Algeria's coast several times.¹⁴⁴

When Hemedti, the head of Sudan's RSF, visited Moscow at the beginning of the Ukraine invasion, he raised hopes that an agreement on Russia's naval base in Sudan could finally be reached.¹⁴⁵ General al-Burhan reportedly remained opposed.¹⁴⁶ Russia's new naval doctrine, signed by Putin in July 2022 against the backdrop of escalating confrontation with the West, emphasized Russia's maritime ambitions and a desire for basing infrastructure in the Red Sea and the Indian Ocean—confirming Russia's enduring desire to see the Sudan deal come to fruition.¹⁴⁷ Lavrov's visit to Khartoum in spring 2023, however, did not yield any tangible breakthroughs on the naval base agreement, whose ratification presupposes the transition of power to a civilian government.¹⁴⁸

Elsewhere in Africa, Russia has flirted with intensified military cooperation, reportedly already using Uganda's Entebbe airport as a logistics hub for its military aircraft¹⁴⁹ and discussing how to leverage Eritrea's port city of Massawa for logistics,¹⁵⁰ train Eritrean

¹⁴³ Jalel Harchaoui and John Lechner, "How Russia's War in Ukraine Affects Its Meddling in Africa," *Lawfare*, May 1, 2022, <https://www.lawfareblog.com/how-russias-war-ukraine-affects-its-meddling-africa>.

¹⁴⁴ "A Russian ship from the Black Sea fleet docks in the port of Algiers," *Atalayar*, September 3, 2023, <https://www.atalayar.com/en/articulo/politics/russian-ship-from-the-black-sea-fleet-docks-in-the-port-of-algiers/20230831152535190288.html>.

¹⁴⁵ "Hemedti says Sudan should be open to naval base accord with Russia, or others," Reuters, March 3, 2022, <https://www.reuters.com/world/africa/hemedti-says-sudan-should-be-open-naval-base-accord-with-russia-or-others-2022-03-02/>.

¹⁴⁶ Gregory Aftandilian, "The Fate of the Wagner Group in Syria, Libya, and Sudan," Arab Center Washington DC, July 18, 2023, <https://arabcenterdc.org/resource/the-fate-of-the-wagner-group-in-syria-libya-and-sudan/>.

¹⁴⁷ "Ukaz Prezidenta Rossiiskoi Federatsii ot 31.07.2022, No. 512, 'Ob utverzhdenii Morskoj doktriny Rossiiskoi Federatsii'" [Decree of the President of the Russian Federation, dated July 31, 2022, No. 512, 'On the approval of the Maritime Doctrine of the Russian Federation'], July 31, 2022, <http://publication.pravo.gov.ru/Document/View/0001202207310001>.

¹⁴⁸ Anton Mardasov, "Sudan war complicates Russia's port plans, strains Wagner ties in Libya," *Al-Monitor*, May 14, 2023, <https://www.al-monitor.com/originals/2023/05/sudan-war-complicates-russias-port-plans-strains-wagner-ties-libya#ixzz8CXOEBg3H>.

¹⁴⁹ "Entebbe serves as key logistics hub for Moscow and Abu Dhabi," *Africa Intelligence*, September 9, 2023, <https://www.africaintelligence.com/eastern-africa-and-the-horn/2023/09/12/entebbe-serves-as-key-logistics-hub-for-moscow-and-abu-dhabi.110042334-art>.

¹⁵⁰ "RF i Eritreya prarabotayut vozmozhnost' ispol'zovaniya logisticheskogo potentsiala Massawa" [Russia and Eritrea to explore the possibility of using the logistics potential of Massawa], Tass, January 27, 2023, <https://tass.ru/ekonomika/16897653>.

soldiers in Russia, or pursue counterterrorism cooperation with the DRC.¹⁵¹ In May, a statement by the CAR ambassador to Russia suggesting that Russia build a military base in the country that could host 5,000-10,000 soldiers generated considerable attention.¹⁵² However, to date, there is no evidence to suggest that this plan is being seriously considered for implementation.

In Latin America, Russia's military and security activities continued at their previous, modest level, though Moscow weighed additional opportunities. In June 2022, Nicaragua reauthorized limited numbers of Russian troops and equipment to enter the country for training missions and other forms of support.¹⁵³ Earlier this summer, a Russian navy ship docked in Cuba to "carry out a wide range of activities."¹⁵⁴ In a worrying turn of events, Russia also reopened the Lourdes listening station, which had been closed in 2001, in the country.¹⁵⁵ In March 2022, General Glen D. VanHerck, commander of USNORTHCOM and NORAD, testified before the U.S. Senate Armed Services Committee that the largest foreign contingent of GRU officers is currently stationed in Mexico, giving further credence to the Russian intelligence-gathering threat emanating from Latin America.¹⁵⁶ Still, Russia's capacities to project a sustained military threat in the Western Hemisphere are limited, considering the distance from Russian ports and proximity to USSOUTHCOM forces. This is especially the case considering that Russia's active-duty military will likely remain tied down in Ukraine for the foreseeable future, while its economic resources to prop up cash-strapped Latin American governments will also be limited.¹⁵⁷

In Asia, Russian capacities for military power projection since the invasion of Ukraine have remained similarly constrained, though they have expanded into new and concerning domains. In terms of military exercises, Moscow has continued its quest for more frequent activity with China, joining the Chinese and South African navies for joint drills in January

¹⁵¹ "DR Kongo poposila sodejstviya Rossii v bor'be s terroristami na vostoke strany" [DR Congo asked for Russia's assistance in the fight against terrorists in the east of the country], Tass, March 19, 2023, <https://tass.ru/mezhdunarodnaya-panorama/17309901>.

¹⁵² "After Sudan, CAR mulls Russian military base," *JNews*, June 10, 2023, <https://www.military.africa/2023/06/after-sudan-car-mulls-russian-naval-base/>. The Wagner-affiliated Grey Zone Telegram channel applauded the ambassador's statement, saying it confirmed Wagner's important role in the CAR: https://t.me/grey_zone/18895. Interestingly, the pro-Russian pan-African social media influencer Natalie Yamb came out against the reported plans, claiming that Africans want neither Russian, nor American, French, or Chinese bases on their territories. See https://twitter.com/Nath_Yamb/status/1663799981067599874.

¹⁵³ "Parlament Nikaragua prodлил razreshenie na prebyvanie zarubezhnykh voennykh, v tom chisle iz RF" [The Parliament of Nicaragua extended the permission for the stay of foreign military, including from the Russian Federation], Tass, June 2, 2023, <https://tass.ru/mezhdunarodnaya-panorama/17916277>.

¹⁵⁴ Patrick Oppmann, "A Russian navy ship docks in Cuba as tough times bring the old friends together," *CNN*, July 13, 2023, <https://edition.cnn.com/2023/07/13/americas/cuba-russia-relations-navy-ship-havana-intl-latam/index.html>.

¹⁵⁵ Sergey Kanev, "Mal'chiki na Kube. Sudya po pribyvayushhim na ostrov GRU-shnym specialistam, Rossiya reanimirovala bazu dlya slezhki za SShA" [Boys in Cuba. Judging by the arrival of specialists on the island, Russia has reanimated the base for spying on the United States], *The Insider*, June 23, 2023, <https://theins.ru/politika/262717>.

¹⁵⁶ General Glen VanHerck, Testimony to the United States Senate Committee on Armed Services, March 24, 2022, <https://www.armed-services.senate.gov/hearings/to-receive-testimony-on-the-posture-of-united-states-northern-command-and-united-states-southern-command>. Russia's intelligence and surveillance activities in Latin America since the invasion of Ukraine are detailed in Douglas Farah and Marianne Richardson, "Dangerous Alliances: Russia's Strategic Inroads in Latin America," Institute for National Strategic Studies, December 2022, <https://inss.ndu.edu/Portals/68/Documents/stratperspective/inss/strategic-perspectives-41.pdf>.

¹⁵⁷ Kimberley Marten, "Russian Military and Economic Interests and Influence in Latin America and the Caribbean: Threats, Limits, and U.S. Policy Recommendations"; Evan Ellis, "Russia in the Western Hemisphere: Assessing Putin's Malign Influence in Latin America and the Caribbean."

2023¹⁵⁸ and conducting joint patrols in the Pacific this past August.¹⁵⁹ Otherwise, Russia has focused on Myanmar, with which it has repeatedly discussed closer defense cooperation¹⁶⁰ and military training,¹⁶¹ before co-hosting a joint anti-terrorism exercise that also involved representatives from Brunei, Cambodia, China, India, Indonesia, Laos, Malaysia, Myanmar, Thailand, the Philippines, and Vietnam.¹⁶²

Outside the realm of military basing, access, and training, Russia has engaged in a number of additional activities in the Global South since the invasion of Ukraine, which risk making target countries more beholden to Moscow:

- There is some evidence to suggest that Moscow has tried to bolster its war effort in Ukraine by drafting military personnel from select Global South countries, including Afghanistan, Cuba, the DPRK, and Myanmar.¹⁶³
- Rosatom has engaged in a flurry of activity to provide nuclear assistance and secure contracts for the construction of new nuclear reactors in Global South countries. Such partnerships are of strategic importance to Russia since the provision of assistance beyond the reactor itself, such as training staff, uranium mining, or service and maintenance is a means of gaining long-term influence. Russia has a solid foundation on which to build, having traditionally dominated the global nuclear reactor sales market, with reactor construction presently underway in Turkey and Egypt. Moscow has long benefited from a reputation for being a financially attractive supplier for nuclear exports, with extensive export experience, while imposing few conditions for transfers. Since February 2022, Rosatom has further pushed nuclear energy cooperation with states as diverse as Bolivia, Brazil, Myanmar, the Philippines, Sri Lanka, and Uganda.¹⁶⁴

¹⁵⁸ “Russian warships to join drills with China, South African navies,” *Al Jazeera*, January 23, 2023, <https://www.aljazeera.com/news/2023/1/23/russian-warship-to-join-drills-with-china-south-africa>.

¹⁵⁹ “Russia warship returns from 13,000km Pacific patrol with Chinese vessels,” *Al Jazeera*, August 27, 2023, <https://www.aljazeera.com/news/2023/8/27/russian-ships-return-from-joint-pacific-patrolling-with-chinese-ships-2>.

¹⁶⁰ “Zamministra oborony RF i prem'er-ministr M'yanmy obsudili perspektivy VTS” [Deputy Minister of Defense of the Russian Federation and the Prime Minister of Myanmar discussed the prospects for military-technical cooperation], Tass, April 3, 2023, <https://tass.ru/armiya-i-opk/17436635>.

¹⁶¹ “Krasnov predlozhl otkryt' v M'yanme kursy s uchastiem ekspertov Voennogo universiteta MO RF” [Krasnov proposed to open courses in Myanmar with the participation of experts from the Military University of the Ministry of Defense of the Russian Federation], Tass, March 22, 2023, <https://tass.ru/obschestvo/17337965>.

¹⁶² “Russia in Review, July 28-Aug. 4, 2023,” *Russia Matters*, Belfer Center for Science and International Affairs, Harvard Kennedy School, August 4, 2023, <https://www.russiamatters.org/news/russia-review/russia-review-july-28-aug-4-2023>.

¹⁶³ “Cuban authorities arrest 17 people over allegedly luring citizens to fight for Russia in conflict against Ukraine,” ABC News (Australia), September 8, 2023, <https://www.abc.net.au/news/2023-09-08/cuba-arrests-17-people-over-alleged-human-traffick-ring/102833052>; Alexey Muraviev, “Wagner coup reshapes Asia’s view of Russia,” *East Asia Forum*, August 17, 2023, <https://www.eastasiaforum.org/2023/08/17/wagner-coup-reshapes-asias-view-of-russia/>.

¹⁶⁴ Andrea Stricker and Anthony Ruggiero, “Ending Global Reliance on Russia’s Nuclear Energy Sector,” Foundation for Defense of Democracies, February 3, 2023, <https://www.fdd.org/analysis/2023/02/03/ending-global-reliance-on-russias-nuclear-energy-sector/>; “Sri Lanka, Russia’s Rosatom To Build Nuclear Plant Together—Ambassador,” *Sputnik International*, June 14, 2023, <https://sputnikglobe.com/20230614/sri-lanka-russias-rosatom-to-build-nuclear-plant-together---ambassador-111150593.html>; “Bolivia Seals \$1.4 Billion Lithium Deals With Russia’s Rosatom, China’s Guoan,” RFE/RL, June 30, 2023, <https://www.rferl.org/a/bolivia-lithium-deal-russia-china/32483336.html>; “Russia, South Korea to build two nuclear power stations in Uganda,” *East African*, August 9, 2023,

- Russia has exercised leverage over global food supplies in ways that affect countries in the Global South disproportionately. By pulling out of the Black Sea Grain Initiative, which had ensured the wartime export of Ukrainian grain, in July 2023 and trying to hinder Ukrainian shipments, Russia has activated an important lever over food prices. Having repeatedly promised to deliver grain or fertilizers to countries in need for free, Russia is clearly using this pressure point to gain influence.¹⁶⁵

The future of other Russian activities in the Global South

Russia will likely seek to intensify its military access to, and joint military activities with, partners in the Global South. There is no clear prospect at present, however, of Russia obtaining additional permanent basing rights. With the outbreak of renewed civil war in Sudan in April 2023, which may well be protracted,¹⁶⁶ Russia's plans for a naval facility in Port Sudan will probably remain unfulfilled for a considerable time. In Libya, Russia has recently intensified its quest for bases in the eastern part of the country,¹⁶⁷ discussing a planned defensive accord during General Haftar's visit to Moscow in late September 2023. U.S. efforts to distance Haftar from Russia have thus far proven unsuccessful, but the form and scope of any expanded, overt Russian presence in Libya remain unclear.

Facing military bandwidth constraints due to the war in Ukraine, Russia will in all likelihood still prioritize the accrual of influence through hybrid means—including disinformation, Moscow's leverage over global food supplies, or Rosatom's inroads into the energy sectors of developing countries. Shoigu's recent decision to cancel the planned Zapad-2023 strategic exercise was indicative of the extent to which Russia's military resources remain consumed by the war in Ukraine.¹⁶⁸ Around the same time, Shoigu reportedly discussed joint naval exercises with China and the DPRK, indicating a heightened Russian interest in smaller, targeted exercises from which Moscow might expect strategic deterrent effects.¹⁶⁹ The same logic might drive Russian activities in Latin America, where Moscow may aim at occasional shows of strength to project power into the Western hemisphere.¹⁷⁰ While the United States should be prepared for Russian military distraction campaigns in various regions of the Global South, it appears unlikely that Russia will risk direct military escalation with the United States—whether near the U.S. homeland or further afield, in countries such as Syria.

<https://www.theeastafrican.co.ke/tea/business/russia-s-korea-to-build-two-nuclear-power-stations-in-uganda-4331186>.

¹⁶⁵ Joshua Surtees, "Growing foothold: how Russia donates fertilizer to deepen African alliances," *The Guardian*, March 13, 2023, <https://www.theguardian.com/global-development/2023/mar/13/russia-fertiliser-donates-deepen-african-alliances-malawi>; Michael Kimmage and Hanna Notte, "How Russia Globalized the War in Ukraine," *Foreign Affairs*, September 1, 2023, <https://www.foreignaffairs.com/russian-federation/how-russia-globalized-war-in-ukraine>.

¹⁶⁶ Sudanese experts at a closed-door Track II meeting attended by the author in August 2023.

¹⁶⁷ Benoit Faucon, "Russia Seeks to Expand Naval Presence in the Mediterranean," *Wall Street Journal*, September 15, 2023, https://www.wsj.com/world/africa/russia-seeks-to-expand-naval-presence-in-the-mediterranean-b8da4db?mod=americas_whatsnews_pos1.

¹⁶⁸ "Rossiya ne budet provodit' strategicheskie ucheniya Zapad-2023 – Shoigu" [Russia will not conduct strategic exercises Zapad-2023 – Shoigu], Interfax, September 4, 2023, <https://www.interfax-russia.ru/moscow/news/rossiya-ne-budet-provodit-strategicheskie-ucheniya-zapad-2023-shoigu>.

¹⁶⁹ Kang Jae-eun, "Russia proposed three-way naval exercise with N. Korea, China: NIS," Yonhap News Agency, September 4, 2023, <https://en.yna.co.kr/view/AEN20230904008951315>.

¹⁷⁰ At the time of writing, social media rumors suggesting that Nicaragua will allow the Russian military to establish bases and cruise missile batteries in the country could not be confirmed.

4. Conclusion and Implications for U.S. Strategic Interests

Key Points from the Analysis

Russia is determined to boost its military and security influence in the Global South over the coming years, viewing such influence as providing it benefits in what it considers a protracted, systemic confrontation with Western states. Russia's capacity to accrue such influence will vary considerably by domain and country. Its war against Ukraine and the attendant effects on Russia's economy, technology base, and reputation are shaping demand- and supply-side factors—what Global South partners want from Russia, and what Russia can offer. Those factors will, in turn, shape Russia's position as a security player. Though Russia's power projection will most likely be limited, its actions will not be trivial—either for states in the Global South or for the United States. Russia's decline looks set to be a dangerous decline.

In the 18 months following the invasion of Ukraine, Russia remained a security player with a formidable reach across the Global South. Moscow continued to transfer defense articles to various partners, as evidenced by an analysis of bills of lading records and port calls by Russian vessels. However, a continuing decrease in pending deliveries for major arms (such as combat aircraft or warships), and reassessments or cancellations of deals with major partners (Egypt, India, and the Philippines) were indicative of Russia's difficulties. While Russia's military presence in Syria has remained solid since February 2022, and is increasingly being leveraged by Moscow to push U.S. forces out of the country, its quest for a naval base in Sudan experienced a further setback with the onset of civil war in that country. Russia's PMC business in Africa, meanwhile, continued to thrive even as the Wagner Group was deploying substantial forces to the Ukrainian battlefield. As of late August 2023, however, it was undergoing a dramatic reconfiguration in the wake of the attempted mutiny by, and subsequent killing of, Wagner's chief, Yevgeny Prigozhin.

Russian arms sales: Down but not out. This study finds that the downward trajectory in Russia's overall weapons exports to countries of the Global South is set to continue, given demand- and supply-side constraints. Western sanctions and export controls, as well as the requirements of the Ukraine war effort, will probably hamper the ability of the Russian defense industry to export high-end defense goods. The poor performance of Russian weapons in Ukraine, the threat of CAATSA sanctions, complications related to payment mechanisms, and an inclination among most Global South states to diversify their defense bases will combine to lower demand for Russian weapons. Pending major revisions to Russia's present foreign policy course, it is poised to increasingly turn into a "second-rate economy with a third-rate technology base," as one defense expert put it.

That said, Russia should not be written off entirely as an arms exporter. It will likely remain active in several areas: Defense articles will doubtlessly continue to flow to Russia's biggest legacy customers, chiefly India, at high volumes for a considerable period. Moscow's defense cooperation with sub-Saharan Africa for lower-end items may deepen. Its defense industry plans to pursue greater competitiveness in the export of various types of military drones. Russia is also poised to step up its provision of defense articles to rogue regimes and countries of proliferation concern, including the DPRK and Iran. Finally, Russia is emerging as an importer of defense goods from select Global South countries.

Russian PMCs: Preservation and rebranding. This study finds that the Russian government is taking steps to ensure the continuity of its PMC business, focused predominantly in Africa, which has grown in mercenary numbers and theaters of operation over the years and which survived the Wagner Group’s substantial battlefield employment in Ukraine. In light of the recent death of Prigozhin, the precise contours of such future activity remain uncertain. Since neither Russian state structures nor other Russian PMCs are well-suited to take on the existing roles of Wagner—which became an elite infantry over time, with considerable combat experience and local networks in target countries—there is no easy fix for Wagner’s business abroad.

Conceivable scenarios discussed in this study include a nationalized, semi-official Wagner tightly controlled by the Russian Defense Ministry or security services, Wagner’s augmentation or replacement by other Russian PMCs affiliated with the Russian state, or a mixture of the two. New ownership and command and control arrangements will seemingly take time to crystallize, but regardless, Russia will likely make sure to retain a presence in its core theaters of operation (the CAR, Libya, Mali, and Sudan). Given the recent proliferation of coups in the Sahel, Russia may also consider additional opportunities, with candidates potentially vulnerable to a PMC presence including Burkina Faso, Chad, the DRC, and Niger. Predictions regarding new PMC inroads, however, remain highly speculative at the time of writing. Building on past experience, factors that may influence Moscow’s choice of new theaters of operation include host government receptiveness, ease of resource exploitation, and the (relative) absence of China.

Other Russian activities: Playing the long game. In the foreseeable future, Russia’s permanent military basing in the Global South will likely remain limited to Syria, where the Kremlin may well intensify its campaign to oust U.S. forces over the medium term. Russia will likely conduct intermittent shows of force in the Global South (through port calls, overflights, or targeted exercises with partner states), hoping to boost its coercive reputation in areas of strategic interest to the United States. Given the constraints on its military and defense enterprise, Russia will also seek to leverage other pressure points over time—such as the provision of civilian nuclear energy, or its sway over the wartime export of Ukrainian and Russian grain—to consolidate influence in Global South countries.

Implications for U.S. Strategic Interests

In most parts of the Global South, Russia’s capacity for projecting a sustained military threat to U.S. interests will probably be limited. Moscow might patiently work to push U.S. forces out of Syria, combining military harassment and a political strategy. Elsewhere, however—in Asia and Latin America—Russia does not have the infrastructure to pose a sustained threat. U.S. forces should always be prepared for worst-case scenarios, including Russian military distraction campaigns of the type recently conducted in northeast Syria, as the Ukraine war continues. With a rogue Russia disregarding established deconfliction protocols and embracing risk for strategic effect, inadvertent escalation is always possible. Still, it is unlikely that Moscow would risk a direct military confrontation with the United States in the Global South.

That said, the various Russian military activities described in this study, when combined, highlight the dangers a declining Russia will pose to U.S. interests. Whether in Africa, Asia, Latin America, or the Middle East, Moscow is intensifying its defense cooperation with authoritarian regimes hostile to Europe or the United States: the military juntas in the Sahel,

the DPRK and Myanmar in Asia, Iran and Syria in the Middle East, and Nicaragua and Venezuela in Latin America. Russia may increasingly form new defense “ecosystems”—characterized by mutual material assistance and knowledge diffusion—with these players. Russia’s shielding of its partners at the United Nations will also make it harder to mitigate the security risks emanating from these states; Russia’s actions to terminate the U.N. Panel of Experts on Mali, or its position on recent DPRK missile launches, are cases in point. Particularly in Africa, an area of priority for the Kremlin, there is also a risk of Russian incremental gains having a knock-on effect: Moscow’s growing influence in a few countries, such as the CAR and Mali, could generate pressures in other countries to follow—particularly if Russia is viewed as a credible alternative to Western countries whose presence is widely resented.

Finally, the United States needs to be clear-eyed about what may fill the vacuum left by a declining Russia—one whose intent to stay active in the Global South may well exceed its capacity. Though the present Russian government’s strategic objectives in the Global South are not benign, from Washington’s perspective, what may replace Moscow is not necessarily in the U.S. interest, either. China is already making inroads with select Middle Eastern weapons importers (especially in the Gulf) and building relationships with armed forces in several Latin American countries. Especially assuming a growing Russian-Chinese alignment, the PRC may pose the bigger challenge to U.S. interests in the Global South in the coming years. Washington should also be realistic about the consequences of a hypothetical collapse of Russian PMCs in Africa. If Wagner is no longer present to defend the juntas of the Sahel—no matter how problematic these states are in terms of their human rights records—the already tenuous security balance in the broader region may be in still more dire straits, in light of the recent departure of Western security actors. Western states should understand Wagner as a symptom of greater structural issues rather than the driving force of conflict in Africa, and they should think more creatively about aid, security assistance, and the need to address local grievances.

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