

A New, More Permissive Context for Authoritarian Influence at Scale

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As the popular saying goes, “there are decades where nothing happens, and there are weeks where decades happen.” It is clear that we are in one of those latter moments.

Outlooks from JPMorgan Chase and the World Economic Forum both suggest a fundamental transformation of geopolitics over just the past two years, driven by the promise of artificial intelligence (AI), geoeconomic confrontation, and a new U.S. foreign policy approach.¹ The leading indices of global democratic health, meanwhile, show that a long-term decline has intensified, with V-Dem reporting that in 2024, autocracies outnumbered democracies for the first time in more than 20 years.² While public support for democracy and especially individual rights remains strong, a common thread in surveys from International IDEA and Pew highlights strong dissatisfaction with the political institutions meant to uphold norms of behavior.³ Stanford University’s AI Index and other global assessments have converged on a thesis that the impacts of AI are rapid, compounding, and erratic.⁴

Just as the world and many other sectors must grapple with these rapid shifts, the democracy community of civic leaders, funders, analysts, and policymakers must also grapple with this new context fundamentally reshaping their own work. The present report gathers insights from key experts and practitioners to help democracy supporters better understand and ultimately respond to the shifting geopolitical, normative, and technological landscape. A new international environment is already prompting the development of new strategies by autocratic powers, and the prodemocracy actors that seek to confront them will have to keep pace.

Defining transnational authoritarian influence, Now at Scale

Democracies face many challenges in today’s environment. However, major authoritarian powers—principally China and Russia—remain both a crucial obstacle to any reversal in the long-term decline of global democracy and an accelerant to the repressive and aggressive capacities of other authoritarian states. Beijing and Moscow actively exacerbate the problem at least as much as they exploit and benefit from it.

The troubling activities and strategies of autocratic powers hold impacts well beyond their borders. Specifically, these actors (1) repurpose democratic institutions, for example by co-opting civil society, media outlets, or judicial systems; (2) undermine the exercise of democratic and human rights in both democracies and nondemocracies, for example by impairing the ability of citizens or dissidents to speak freely, ensure their own privacy, or participate in governance and political affairs; and (3) directly interfere in democratic processes, for example by funding preferred political candidates, fueling insurgencies, or providing security assistance to prop up other autocratic leaders.

Nearly 10 years ago, the National Endowment for Democracy’s International Forum for Democratic Studies began to define the impacts of transnational authoritarian influence, or “sharp

power.”⁵ An initial report and subsequent analyses documented the ways in which Beijing, Moscow, and other less prominent authoritarian powers penetrated and manipulated the media, research, cultural, business, and political sectors in targeted countries.

Now, the same societies and institutions face a profoundly different—and more dangerous—international environment and a more capable, assertive set of authoritarian regimes seeking to shape it. New tools and collaborations among autocrats have strengthened their efforts, and democracies’ attempts to check them have only a mixed record of success. Even liberal democratic practices long undertaken by media outlets, institutions of higher education, activist consumers, and international sports bodies have at times been repurposed to serve the interests of authoritarian powers.⁶

The rising stakes of situational awareness

In this new period of autocratic impunity, local grassroots democracy activists cannot afford to ignore or underestimate the external sources of authoritarian influence and control that may already be affecting their societies. Igor Blažević, a trailblazing human rights defender, once encouraged democracy activists to remain rooted in their own countries’ democratic struggles, but also to spend one-quarter of their time thinking beyond their national contexts and supporting the struggles of others.⁷ Giving strategic consideration to fundamentally new global conditions for the democratic development of your own country is one way to meet Blažević’s tall order.

When major authoritarian powers operate internationally, their companies, civic organizations, and even individual citizens frequently face enormous pressure to comply with and advance regime directives, rather than functioning as free and independent actors. This phenomenon can be found, for instance, in technology agreements, infrastructure projects, and academic cooperation when at least one party is based in a deeply authoritarian setting. The global influence efforts of the Chinese Communist Party (CCP) offer perhaps the starkest example. The ripple effects of Beijing’s persecution and co-optation of independent civic activists and journalists within China are visible in its treatment of their counterparts overseas.⁸

Outlining a new period of autocratic impunity

A decade ago, CCP leader Xi Jinping and Russian President Vladimir Putin were still consolidating their own rule, and their foreign policies were just beginning to demonstrate the levels of aggression and coercion that would eventually be felt by their neighbors. The United States, Europe, and Japan still hoped for strategic cooperation with a CCP-led China. Widely accessible, effective AI models were over the horizon; the global spread of Huawei’s surveillance-ridden “smart cities” project was in its early stages.⁹ Despite ample evidence of Putin’s belligerence following the 2008 Russian invasion of Georgia and the 2014 occupations of Crimea and the Donbas in Ukraine, the all-out rupture with Washington and Brussels that accompanied the 2022 full-scale invasion had yet to come. Leading democracies provided relatively reliable political and financial support to international human rights bodies and other accountability mechanisms.

Today, the international operating environment for both autocracies and democracies has fundamentally changed. Relations among major and rising powers—from China, Russia, and the

United States to regional players like the United Arab Emirates and Saudi Arabia—are more competitive, mercantilist, and at times coercive. Liberal international structures and the norms that have helped uphold them are more vulnerable than at any other time since the end of the Cold War. Similarly, the digital and physical tools now available for transnational repression are more widespread and destructive.

While there are bright spots for democratic growth, political reform, and government accountability, prodemocracy actors—including governments, civic organizations, philanthropies, and citizens—now face a far more challenging global context. This is not just an era of “declining democracy” around the world.¹⁰ Instead, all those seeking to confront repressive rulers must contend with a new period of autocratic impunity.

So what do these **geopolitical shifts** look like and how are they manifested in transnational authoritarian influence strategies that affect democratic development? Just within the past two years:

- *Beijing has shifted its outward-facing influence strategy toward Global South regions like Africa, Latin America, and South and Southeast Asia rather than the United States and Europe.*¹¹ China’s foreign engagement plays out mostly in a field of partly free democracies and fellow autocracies where the CCP regime finds an easier path in pursuit of its interests.
- *Moscow faces enormous pressures stemming from its failure to date in Ukraine and the apparent loss or weakening of autocratic allies in places like Syria, Venezuela, Iran, and the Sahel.*¹² While the temporary and partial breakup of this autocratic network holds promise, the Kremlin has continued to demonstrate complete disregard for the most basic principles of democracy, sovereignty, and territorial integrity.
- *Although the turmoil in the Middle East is not yet settled, the Iranian regime’s capacity to fuel insurgencies and spread its repressive ideology has been severely degraded over the past three years.*¹³ The resulting geopolitical realignments and rivalries among Iran and the Persian Gulf monarchies will continue to animate their respective strategies for authoritarian influence outside their borders.¹⁴
- *Key autocratic powers, including Russia and China, are now increasingly aligned and collaborating in meaningful ways.* Although these collaborations have stopped short of formal military alliances, what were once uneasy and mostly diplomatic partnerships have now matured into exchanges of significant, material support at the expense of world peace and fundamental freedoms.¹⁵ The mutual support has included North Korean troops fighting on Moscow’s behalf against Ukraine, Tehran deploying Chinese and Russian technology to suppress mass protests, and cross-promotion of propaganda in foreign-facing state media.
- *Foreign policy changes in the United States and Europe have shifted their priorities away from soft-power initiatives and toward military readiness and immediate security threats.*¹⁶ The deteriorating global security environment and perceived threats from Western

Hemispheric dictatorships and from Russia in Eastern Europe will inevitably focus U.S. and European government resources on the most urgent defense needs, as opposed to long-term foreign assistance and support for democracy outside high-priority regions.

Within the system of **international institutions** that offer material, moral, and political support to those confronting authoritarian abuses, new sources of strain have compounded long-term erosion of these bodies and the norms that underpin their work.

- *The effectiveness of multilateral institutions tasked with promoting human rights and democratic principles has deteriorated, particularly in subject areas like technology, elections, justice, and protection of civil society.* The actions of major autocratic powers like China within international human rights bodies have contributed to this decline, a trend that the Forum analyzed in depth two years ago.¹⁷ New political realities in democracies with traditional leadership roles further dim the prospects for reform of these institutions.
- *Democracy, human rights, and governance funding from leading democracies like the United States and some European countries has been dramatically reduced.*¹⁸ The ability of grassroots democratic movements to consolidate and expand their successes with foreign funding has been diminished not only by these reductions on the part of donors, but also by a proliferation of restrictive laws on foreign funding in the recipients' countries. Beyond their financial impact, the changes threaten the moral and diplomatic support that has long buoyed prodemocracy activists working under difficult conditions.
- *New multilateral arrangements led by Beijing and Moscow has laid bare a widespread dissatisfaction with the architecture of established international institutions, and the alternative entities have increasingly served as clubs for autocrats and others who share their vision for a revised international order.* Initiatives including the BRICS group, China's Global Security Initiative, and the Shanghai Cooperation Organization—as well as symbolic gatherings like Beijing's World War II victory parade in September 2025—have had mixed records in terms of their practical impact.¹⁹ However, they all lend diplomatic legitimacy and political clout to an increasingly collaborative global cohort of autocratic rulers.²⁰
- *Public support for democratic norms, rights, and reform remains strong, but frustration with elites and existing political systems is high.* According to polling research, citizens feel that political elites and the systems they manage do not work for them and are unlikely to change.²¹ This breeds pessimism about the value of domestic and international institutions, but it can also motivate new international approaches, democratic reform initiatives, and protest movements like those in Bangladesh, Nepal, and Kenya in recent years.

Today's rapidly intensifying **technological competition** has major implications for the engagement strategies of authoritarian powers, principally China, but also others like Russia, Saudi Arabia, and the United Arab Emirates.

- *Recent advances in the applications of generative AI, which will have transformative effects across governments, economies, and societies, are already fueling what some*

*analysts have called an AI Cold War.*²² For both major and smaller powers, AI breakthroughs have triggered military modernization programs; reshuffled partnerships among highly capitalized economies like China, the United States, and the Persian Gulf monarchies; and altered the tools that governments utilize to enforce laws and administer public services.

- *A surge in demand for critical minerals used in renewable energy and AI infrastructure has made control over their extraction and distribution a top priority for governments around the world.* This creates opportunities and vulnerabilities for emerging mineral source countries in Africa, Latin America, and elsewhere, most of which are rated Partly Free or Not Free by Freedom House. The demand for such minerals, which already account for roughly 10 percent of global trade, is expected to triple in five years and quadruple in 15 years.²³
- *Advanced technology has reduced the cost and difficulty of authoritarian efforts to control dissent.* Rather than deploying huge numbers of security personnel and informants, autocratic regimes can now rely on ubiquitous cameras, spyware, and AI-enabled data processing to surveil populations. They can also cut or selectively throttle global internet access during protests, or harass critics and exiles located thousands of miles away.²⁴
- *The race for control over key natural resources and technologies has contributed to neo-mercantilist approaches to foreign economic engagement among many countries.*²⁵ This has further undermined the international rules and norms supporting a stable system of market-driven global commerce, which had also incorporated important democratic principles like the rule of law, public participation, and labor rights.

It might be easy to dismiss this new geopolitical, normative, and technological context as an outgrowth of the competition between great powers that is less relevant for smaller societies, including most of the Not Free and Partly Free countries where NED partners work. However, the new dynamics will have an impact far beyond Beijing, Moscow, Washington, or Brussels. To date, the most significant targets for Chinese and Russian authoritarian influence have been places like Syria, Moldova, Belarus, Taiwan, Pakistan, Zimbabwe, and Panama.²⁶ Small and medium-sized countries—and the vulnerable civic actors within them—have long relied on the protections of an international normative and institutional framework whose force is now greatly diminished. Moreover, poorly managed growth in extractive industries has historically led to harmful, exclusionary outcomes that undermine the rights of workers, fuel corruption, and impair or reverse democratic development.

Toward new thinking and new responses

To help the global community of civic actors—activists, researchers, independent journalists, and funders—better understand the new context and ultimately respond with innovative approaches, the International Forum for Democratic Studies convened three roundtable discussions with foreign policy specialists, civic partners and experts, democracy scholars at the University of Notre Dame’s annual conference, and NED staff between late 2025 and the first half of 2026.

The essays in this series resulted from and were shaped by the views of the participants. China foreign policy and democracy experts Caroline Costello of the Atlantic Council and William Nee of the NED describe how Beijing's comprehensive authoritarian influence strategy has undermined democratic freedoms and human rights in this new period of impunity, operating within backsliding democracies and in a less restrictive international environment. Alex Cooley of Columbia University's Barnard College explores the ways in which Moscow's global strategy has evolved since its full-scale invasion of Ukraine, showing that, despite a string of failures, the Kremlin has leaned into more aggressive measures to promote its interests and punish its opponents in Europe and elsewhere. Florindo Chivucute highlights how these new authoritarian strategies have played out locally in Angola, where both Beijing and Moscow have helped accelerate and entrench corruption, opacity, and repression, at the expense of Angolan development and citizens' rights. His challenge regarding how civic actors in places like Angola can respond will help inform future, deeper work by the International Forum for Democratic Studies on how democracies should respond.

The essays and the roundtables that preceded them point to a few key trends in authoritarian powers' influence efforts, as well as critical vulnerabilities among democracies of all stripes. Civil society activists and all those working for democratic progress will have to contend with these conditions in the years to come.

Key trends, predictive analysis, and democratic vulnerabilities

- *Transnational repression is becoming easier, not harder.* An enterprise that used to consist of occasional harassing phone calls from home-country security officials or rare, gruesome poisonings by Russian agents has now been greatly amplified in scale and reach with the help of advanced digital and financial tools. It has also been professionalized within authoritarian systems and contracted out to third parties, affecting a far broader array of exiles and citizens of other countries.
- *Electoral interference, in particular by Moscow in its European periphery, has broadened beyond manipulation of media narratives to include financial and cybersecurity tools.* The CCP's electoral interference remains limited, as Beijing's representatives—backed by economic threats and promises—have been able to exercise greater political leverage over elites from a range of democracies.
- *China and Russia's sharp power activities reach a far wider set of sectors and actors than in the past.* The introduction of lawfare, paramilitary security aid, law enforcement co-optation, and state-run "civic" organizations by both authoritarian powers has presented new challenges in societies that are unprepared for them.
- *These powers' engagement in other countries will become more affiliated with criminal enterprises.* The new "gig economy" for transnational repression, continued illegal activity by China's United Front apparatus, and the growing nexus between Chinese overseas criminal activity and party-state interests represent new tools better equipped for a more permissive international environment, especially in less developed economies.

These trends have exposed deeper vulnerabilities of all kinds, and they must be properly identified and understood if democracies of all stripes are to successfully address them.

- *Legal and governance gaps that facilitate authoritarian influence strategies have developed from a potential vulnerability into a clear and present problem.* Authoritarian powers now readily exploit weak campaign financing laws, frivolous lawsuits, exceptions to public-procurement oversight, antiharassment laws, and debanking provisions. Found in democracies up and down Freedom House’s scale, these gaps must be remedied through stronger collaboration between civic groups and policymaking officials, and civil society efforts to enlist new, unlikely allies in the financial, legal, and security sectors.
- *Although advanced technologies could allow democracy supporters to scale up their activities, they have already supercharged the capacity of foreign governments to reach across borders and exert antidemocratic influence.* This digital imbalance between authoritarian powers and civic actors can be especially harmful for electoral integrity, open discussion of geopolitically sensitive topics, and free speech in general.
- *Normative, material, and moral leadership on democracy is more dependent than ever on local actors and movements, as international institutions have eroded and international democratic leadership wanes.* In countries where U.S. and European support once helped to prevent government backsliding, local democracy activists will bear more of the burden with respect to public advocacy, legal measures, and funding.

For civic actors seeking to counter foreign authoritarian influence, the challenges have grown and the responses have not kept up. The situation calls for the development and analysis of new tactics and methods. Leading democratic governments and philanthropic donors must recommit to competing with authoritarian powers by providing rights-respecting media, technology, and security support. Local democracy activists in turn will need to deepen their connections and learning across the Global South and build collaborative relationships with new partners in their own societies.

Despite this new era of autocratic impunity, the demand for dignity, accountability, and freedom endures among ordinary citizens. An adaptive, connected, resolute, and well-supported community of local and global civic actors can still make progress toward a more open and democratic future in the face of foreign authoritarian influence.

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