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The Geopolitical Vulnerabilities of the UK's International Military Partnerships – A Case Study Analysis

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Foreword

We live in the most unpredictable of times. Global threats continue to increase, with more than 110 armed conflicts around the world, including the most bloody war in Europe since 1945, whilst defensive alliances have become less assured with multiple governments in transition following the 2024 year of elections. In this era of uncertainty, military preparedness and confidence in key partnerships has never been more necessary so that the UK is fully equipped to protect its global interests and maintain its role as a strong partner to others.

The British Armed Forces have a permanent or operational presence in dozens of countries around the world. This global footprint provides the UK with the reach and the timeliness to protect both its allies and its own interests. These bases not only consolidate the UK's hard power capabilities but offer enormous opportunities to extend its influence throughout society. However, over recent years the UK has taken a less holistic approach to its overseas presence creating a gap that could threaten the reliability of their positions.

The return of Great Power politics, in particular the tension between the US and China, could potentially putting the UK's military relationships under strain as each country exploits this gap. If, for example, Beijing or Washington's influence increases over a country where British troops are based, then there is the risk that this influence could weaken the UK presence. This would have the potential to disrupt the UK's freedom to deal with international threats.
The Adarga Research Institute has developed a model to quantify the level of influence that one country can exert over another and the risks to a country's global standing. In this paper we have used a light version of our Country Influence Index model to examine the relative level of UK, Chinese and US influence across selected UK defence partners and assess the threat to UK influence in these countries.

In partnership with experts from The Tony Blair Institute for Global Change, we assessed the practical and implementable next steps that the UK government could take in order to ensure the long-term stability of its defence partnerships. At this critical time, as the UK coordinates multiple reviews across the defence and foreign policy system, we hope that the paper can stimulate a debate about the nature of the UK's partnerships worldwide, and how they can be enhanced to better support the UK's military capabilities.

Sam Olsen

Sam Olsen is the VP of the Adarga Research Institute. He is an expert on Great Power rivalry, the analysis of the changing world order, and the use of artificial intelligence in geopolitical analysis. His writing on Chinese-Western relations has been extensively published, including in *The Spectator, The Hill, and The South China Morning Post.*

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Dr Melanie Garson is the Cyber Policy and Tech Geopolitics Lead at the Tony Blair Institute for Global Change. As well as being an Associate Professor in International Security and Conflict, she explores the intersection of emerging technologies, security, and global diplomacy. Her insights are frequently sought after at international conferences and major outlets like Bloomberg, BBC, Sky, and CNN.

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Daniel Sleat is Senior Policy Advisor, Geopolitics (Europe and Global Trends) at the Tony Blair Institute for Global Change. He provides strategic analysis on global issues, focusing on Europe. Dan has led critical TBI initiatives, including pandemic responses and geopolitical crises. Before joining TBI Dan worked as a political adviser to two cabinet ministers, helping to set up the first UK-Turkey bilateral forum and the first UK parliamentary visit to Iran in a decade.

William Matthews

William Matthews specialises in the geopolitics and comparative social science of China, with a focus on emerging-established power dynamics. Holding a PhD from UCL, he previously taught at LSE and authored key works on Chinese belief systems. Now a Senior Research Fellow at Chatham House, he examines China's role on the global stage.

The UK's Military Partnerships in an Era of Great Power Competition: Threats and Opportunities

About the Adarga Research Institute

Adarga is a British AI software leader. Its Research Institute produces data and artificial intelligence driven research on the most important geopolitical and technological issues of our time, employing a unique synthesis of expertise, technology, and proprietary data models to deliver in-depth analysis.

Our mission is to produce research that will better illuminate the geopolitical and emerging technology landscape, in order to support more effective decision making.

01. Executive Summary

The UK's military relationships are under stress from the changing geopolitical landscape, and in particular Great Power competition between China and the US.

There has been a longstanding tradition of viewing the UK's military partners almost exclusively through a military lens. However, political, economic, and technological stability and growth are all important too, and this means that governments must consider a broader relationship with countries when choosing their allies and partners.

The decline in British economic and technological influence around the world means that there is a risk that military partnerships are under threat of compromise. If another country becomes the main trade partner and provider of technology to one of the UK's military partners, then this may create a risk of compromise of the military relationship.

In an era where China and the US outspend the next 38 countries on defence combined, the UK's geopolitical relevance and reach depends on the strength of the partners it has around the world. Investing properly in a network of complementary allies in strategic regions - like Africa, the Middle East and Southeast Asia - the UK has the capability to compete globally. Without these, it risks falling behind in an increasingly complex geopolitical landscape.

In this indicative paper, we use Adarga's Country Influence Index methodology to look at the potential threat to the UK's military relationships around the world, in particular as part of broader considerations of Great Power competition. We have selected three case studies out of the many countries important for UK defence: Brunei, Kenya, and Oman. These were chosen because of their importance as global defence hubs (Kenya and Oman) or their strategic location near one of the potential flashpoints for conflict (Brunei). We then analysed the extent to which wider Chinese or US influence is potentially undermining the UK's military relationship, with the following results:

- **Brunei:** substantial risk of the UK's military relationship being compromised.
- **Kenya:** moderate risk of the UK's military relationship being compromised.
- **Oman:** light risk of the UK's military relationship being compromised.

Summary of Policy Recommendations

The UK continues to occupy a unique place in the hearts and minds of many of its key allies, but this cannot be taken for granted.

As international competition for influence intensifies, especially in the context of Great Power competition, the UK needs to develop a new approach to its defence partnerships. This requires the UK to view its alliances holistically with a greater understanding of the wider ecosystem in which they sit, and how the UK can add value within these ecosystems to further consolidate their relationship.

Identifying the areas in which the UK can bolster these relationships by drawing on its strengths, whether trusted financial services or access to education, means that the UK can translate its soft power to be a leading example of a smart power holding its own between superpowers.

Specific recommendations to support this new approach, provided by the Tony Blair Institute for Global Change, include:

1. The UK improving its capacity to understand the nature of its defence partnerships as part of its core foreign policy and strategic ambitions.

2. The Government to undertake a systematic, multi-dimensional audit of the UK's alliances – within the context of the ongoing Strategic Defence Review. This would provide the basis for level recommendations on which alliances the UK needs and the levers to deepen these.

3. Identifying, as an outcome of the alliances audit in point (2), areas where the UK can reinforce relations with key military partners. If filling the gap is not possible for the UK alone, then consideration must be given to how to leverage relationships with key global partners from the EU, NATO and AUKUS to grow and maintain influence in these strategic locations. This will be crucial for cementing alliances and capabilities for the long term.

02.
Introduction

This paper examines the vulnerability of the UK's international military partnerships and defence diplomacy within today's rapidly shifting world order. These partnerships have for many years been key in providing military advantage to the UK, through better situational awareness and the ability to reduce the time to engagement in strategic locations.

At their height, these connections were much more than just military in nature; the wider British investments in these countries bolstered the relationship, increasing their acceptance on non-sovereign territory by locals and government. As the nature of power has shifted, the strength of these relationships is being eroded by new dependencies and enablers from other powers, particularly the US and China.

Two of the most consequential pillars of modern economies are trade and digital infrastructure. These are useful examples of how the UK's participation in the world, including with military partners, has shrunk over the years.

Trade is an important driver in the relationship between countries. Academic research shows that as two states become more economically engaged, so their foreign policies converge over shared interests.[1] This provides a structural problem for the UK's international influence, given that its share of world trade fell in recent decades, from a 5.3% share of global exports of goods in 1980 to 2.3% in 2020.[2] In the same period, China's share rose from 0.9% to 14.7%, and the US' dropped from 11.1% to 8.1%.

Investments in infrastructure and supply chain architecture are key enablers of growth in the AI era. From building subsea cables to datacentres, they are redistributing the power balance in key countries with which the UK has important relationships. Far from seizing the opportunity to invest in these critical enablers themselves, the UK now finds itself in the position that its relationships may be compromised by its allies' dependencies on these foreign assets.

Added to this slow withdrawal of overall British participation is the conflict between military and political interests, particularly in territories needed for the UK military footprint. This was exemplified by the recent announcement of the UK's handover of the Chagos Islands, albeit whilst maintaining a leased military presence on Diego Garcia.

These three elements are indicators of how the overall UK relationship with military partners has become vulnerable to compromise in a wider setting. This paper aims to address these vulnerabilities.

There are many countries around the world important for the UK's defence posture. To highlight the vulnerabilities to these relationships generated by shifting international influence, we have selected three countries as case studies.

- **Brunei** is vital for the UK's position in the Indo-Pacific and is the one remaining Army and Royal Air Force base in the region; it is also close, in many senses of the word, to China. Brunei is positioned in the First Island Chain, which is crucial for wider Western support for Taiwan as it seeks to avoid reunification with the People's Republic of China.

- **Kenya** is one of the UK's global defence hubs and has a crucial role in the training of British troops. The relationship gives Britain a presence on the coast of the strategically vital Indian Ocean.

- **Oman** is a long-term ally of the UK, and arguably its closest in the Middle East. It is also one of Britain's defence hubs, and has an important port and land training centre for the British military.

As the UK reviews its strategic defence positioning, it is imperative that it steps back and looks holistically at these strategic relationships in their wider context and future trajectory, including trade relations and the provision of digital infrastructure. Shoring up the UK's power and influence will require it to think of how to create a smarter approach, one that can utilise the full range of the country's capabilities and opportunities to support its vital relationships.

This report is intended to illustrate the value of this approach as the basis for broader assessment of the UK's defence diplomacy, with a view to identifying threats and opportunities presented by the broader strategic environment and current levels of UK influence globally. This will assist UK policymakers in identifying areas to which to direct attention and resources to ensure the continued value of its defence partnerships.

2.1 Context

The UK relies on a range of bilateral partnerships for its global military footprint, including for operational bases, training centres, and in support of defence treaties. The UK's military partners are a key component of its military and diplomatic power. These include countries where the British military can train (such as Kenya); where there are bases that are useful for supporting the UK's position in the Indo-Pacific (such as Brunei); or for military action to support UK interests in the Middle East (such as Oman).

Without these countries' support it would be very difficult, if not impossible, for the UK to have a global military footprint.

The UK's strategic interests, which its military supports, exist in an increasingly unpredictable geopolitical environment where middle powers can tip the balance. As one such country, the UK is caught in a position from which it must navigate its close alliance with the US, its relationship with Europe, and economic and research engagement with China, all alongside cooperation on global challenges such as climate change.

While US and UK interests often align, particularly in relation to national security concerns. the two countries' national interests are not always identical. The UK is not in the position of a global superpower and has different roles and responsibilities within the global order.

US interests also have the potential to change, depending on the Presidential Administration. This has significant implications for UK foreign policy and defence diplomacy.

2.2
The Threat of Relationship Compromise

The UK has long viewed its global defence relationships through military eyes. However, defence does not sit in a vacuum. Many, if not most, countries consider defence ties part of a wider bilateral relationship. A problem for the UK is that its strength in wider bilateral relationships (aside from defence) has been weakened by a retreat from the world, its economic and technological influence having been eclipsed by other countries over the decades. While the UK continually ranks as a major soft power, it is not likely that soft power alone can act to influence countries in the same way that harder levers of influence can.

Previous Adarga research has shown that China has developed a concept of influence that rests on the provision of hard levers, two of which are the provision of digital infrastructure and being a dominant economic partner. Such are the importance of these two factors to a modern economy that China's 'techno-economic' influence has the capacity to surpass military relations as a driver of strategic decision making. Pakistan, for instance, has now adopted the Chinese satellite navigation system BeiDou over the US equivalent GPS for its military[3]. As Pakistan's advanced weapons now run (reportedly solely) on a Chinese system, and only Chinese companies can build this technology, this gives Beijing strong de facto influence over the Pakistani government through its military that is likely in reality to be a stronger lever of influence than Pakistan's defence treaty with the US.

The US might not have focused on developing the trade networks or digital infrastructure provision of China, but it does have the world's most powerful military, and is represented by some of the world's largest tech companies that are investing in these locations. Although it is the UK's closest ally, the US will always put its security interests first. We assess that if it perceives that these interests are better served by it being the dominant military influence in a certain country, then UK military influence there might suffer as a result. US influence might eclipse the UK's even without specific intent by the US. Partner countries have agency, and could decide to focus their relationship on Washington rather than London if this is deemed to be preferable.

The UK's global military partnerships are a significant tool in its defence and diplomatic arsenal, by which it leverages the reputation of its respected and advanced military to cement key relationships that can support its strategic interests. However, to maintain these the UK needs to better predict and prepare for the broader context of geopolitical influence that is reshaping the strategic calculations that UK partners will need to make in their own interests.

The UK faces two significant threats to its interests being overtaken by the advantages offered by other partners. First is by the UK's partners being offered more impactful economic and technological relationships, in particular (but not solely) by China. Second, by British military usefulness being replaced by the more powerful US, or even China as its military power increases. Revisiting and renewing its approach to key military alliances is imperative for the UK, not only to project its own direct interests, but also to consolidate its role in the complex array of significant powers that sit between the US and China.

2.3
Scope and Methodology

Whether through the flexing of alternative trade, digital infrastructure, or defence relations, it is clear that the UK's military partnerships are potentially vulnerable to being eroded by others. This paper uses Adarga's unique influence methodology to understand the likelihood and risks of this compromise by analysing the degree of influence that other countries have over the UK's military partners.

Through analysing the relationships with three key partners – Brunei, Kenya, and Oman – between 2019-2024, we seek to assess the areas of erosion of influence and opportunities for new strategic ambition. Each of these countries similarly faces the challenge of navigating US-China competition, and, like the UK, each maintains a defensive partnership (though not a military alliance) with the US, while also relying heavily on China economically and technologically.

This report assesses these dynamics through an approach based on Adarga's Country Influence Index (CII), which draws on a broad range of quantitative and qualitative data to assess Structural Influence. Structural Influence is defined as the degree to which an influenced country's decision-making must take into account the interests of an influencing country. This provides an indication of the degree to which a country's autonomous decision-making is compromised based on another country's involvement; for example via trade dependencies, security obligations, and reliance on technology provision.

The level of Structural Influence over the selected countries is assessed here via the following:[4]

1. Defence relations (operational base locations, defence diplomacy, joint exercises, and arms sales). Although the UK has close defence relations with all three countries (Brunei, Kenya, Oman), it is important to understand not only how deep these relations actually are, but also how deep these countries' defence relations are with the US and China.

2. Bilateral trade and the presence of banks. Trade is the lifeblood of most economies, and whichever country dominates the trade of another will have significant Structural Influence over it. While the UK cannot compete with China or the US in terms of trade, the comparative importance of countries as trade partners is significant in the context of geopolitical tensions or conflict in which countries are pressured to take sides. Banking is a traditional strength of the UK and is a key tool of influence, so if the Great Powers have more banking presence than the UK this will be a blow to British influence.

3. The provision of digital infrastructure - with a focus on 5G provision by Huawei, and the adoption of BeiDou, China's satellite navigation system rival to the US' GPS. There are strong concerns that Beijing maintains influence over Huawei to the extent that it could force the company to interrupt its coverage in countries that go against China's strategic goals. By adopting BeiDou, which has numerous military and civilian applications, countries partially cede decision making autonomy to Beijing as the system can, like Huawei's, be cut off.

03.
Case Studies

3.1
Brunei

Located in Southeast Asia, a member of ASEAN, and contesting China's claims in the South China Sea, Brunei is faced with the strategic challenge of navigating the China-US relationship as a small country with defence ties to the US and UK and a very high degree of economic dependence on China. Its position in the First Island Chain surrounding China gives it particular importance should there be any future action over Taiwan.

3.1.1 Brunei's Defence Relationships

	UK	China	US
Military base	✓	✗	✗
Joint military training	✓	✓	✓
Bilateral defence ministry meetings	✓	✓	✓
Professional military education provided	✓	✓	✓
Naval visits	✓	✓	✓

Fig. 1. UK, Chinese, and US defence diplomacy and base hosting 2019-24 – Brunei.
Source: Adarga Research Institute research

The **UK's** military relationship with Brunei stretches back to the late nineteenth century when it became a British protectorate; the close relationship has continued even since its independence in 1984. The Sultanate is home to a British Army and RAF base, is a centre of jungle training, and the light regiment based there acts as the acclimatised Far East reserve. It is also one of only a few UK bases East of Suez that can accommodate Royal Navy ships.

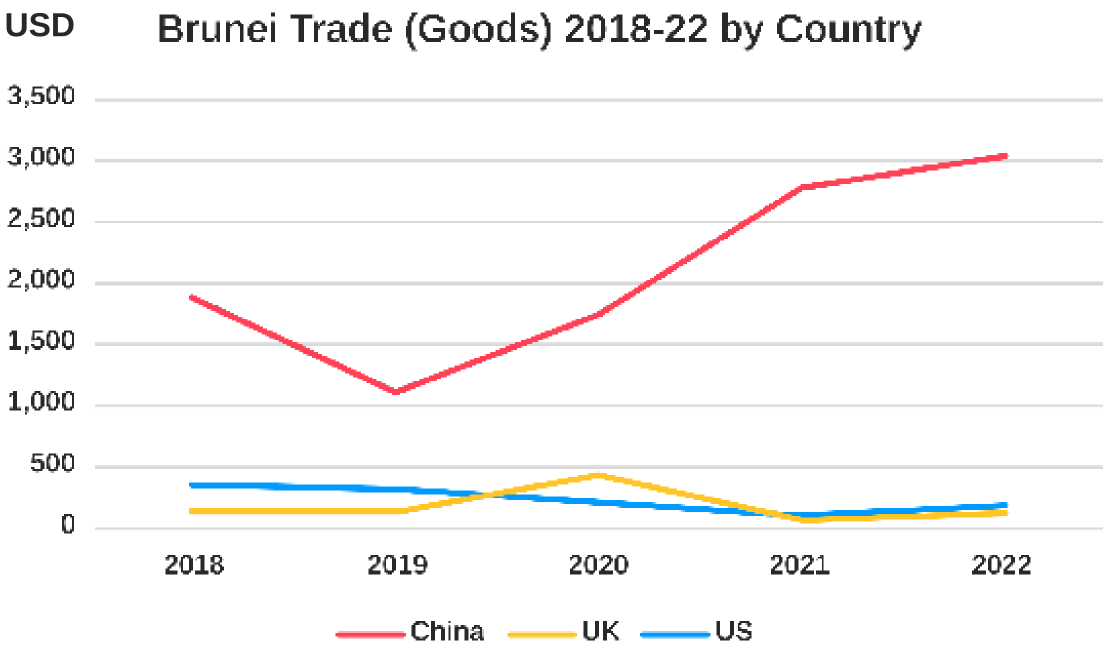
UK base expenses are paid by the Sultan, who is a graduate of the Royal Military Academy Sandhurst.[5] As an absolute monarch, it is assessed that his personal support is the major reason for the continued UK presence there.

The UK-Brunei defence relationship 2019-24 has seen joint exercises, training, ship visits, and high-level military-political meetings. On the flipside, the UK has not sold Brunei any arms in the last five years. As arms sales are a strong source of Structural Influence, this is assessed as a lost opportunity to cement the UK's military presence there above and beyond the relationship with the Sultan.

Defence diplomacy is a vital part of **US-Brunei** relations, in keeping with the US's historical approach of viewing alliances and strategic partnerships primarily in military terms.[6] In previous years the US has conducted joint exercises, temporarily deployed F35s there, had military-political meetings, and facilitated professional military training of Bruneian forces.[7] However, with no US base and no overt support from the Sultan, the US's military relationship is considered not as strong as the UK's, even if it did sell a small number of UAVs to the Sultanate in 2020.[8]

China is increasing its military relationship with Brunei. In the last five years, it has conducted joint exercises, organised a naval visit, and had high level military-political meetings, including one between the Sultan and the Chinese Defence Minister[9]. It did not though sell any arms to the country.

3.1.2 Trade, Finance, and Infrastructure Provision



Partner	2018	2019	2020	2021	2022
China	1,870.73	1,100.82	1,743.90	2,770.65	3,024.52
UK	139.67	143.53	447.32	82.06	135.04
US	364.00	329.30	229.30	117.80	204.10

Fig. 2. Brunei's trade in goods with China, the UK, and the US, 2018-2022 (millions of USD).
Source: WITS (World Bank)

The **UK** has very little trade with Brunei, which is only the UK's 136th largest trade partner.[10] Shell (since 1929) has operations there and is the largest producer of oil in the country.[11] Although the UK bank Standard Chartered still operates there, the withdrawal of HSBC in 2017 was cited by some as reflective of a declining British interest in Brunei.[12]

At approximately the same time that HSBC left Brunei, the Bank of China arrived.[13] **China's** trade with the Sultanate is now over 22 times that of the UK. China-Brunei trade has increased rapidly since 2018 and is dominated by chemical products.[14] Much of this trade stems from China's building of a massive new petrochemical refinery in Brunei, the second phase of which represented more FDI into the country than all previous FDI combined[15]. On top of this, China is building roads, bridges, and adding to the port.[16]

The **US** bank State Street operates in Brunei, as do many US retail companies like McDonalds and Starbucks.[17] However, there is little strategic US economic interest there, and the country is only the 134th export market for US goods.[18]

	2015	2020	2024
UK	HSBC, Standard Chartered	Standard Chartered	Standard Chartered
China	–	Bank of China	Bank of China
US	State Street	State Street	State Street

Fig. 3. Presence of UK, Chinese, and US banks in Brunei. Source: Various

3.1.3 Digital Infrastructure and Technology

China is an important digital infrastructure partner for Brunei, whose 5G network is facilitated by Huawei.[19] In addition, Brunei has signed a partnership with China for the use of BeiDou, although it is assessed that GPS is still used for military purposes.[20] There is no identified provision of strategically important digital infrastructure by the US or UK.

3.1.4 Overall Assessment of the Risk of Compromise of UK's Defence Relationship with Brunei: Substantial

The **UK** has a very strong military relationship with Brunei. It also dominates its oil production. However, there is no guarantee that Shell's licences will continue forever, and indeed, as seen recently in Iraq, Chinese firms have taken over foreign oil concessions.[21]

In terms of trade and digital infrastructure, the UK's non-oil influence is overshadowed by China. Beijing's economic and digital infrastructure influence is assessed to be having an impact on the wider political relations of the Sultanate. Since the opening of the new China-built refinery, and other Chinese funding of roads and bridges, Brunei has increasingly shown signs of aligning with **China's** geopolitical interests on core issues. During a 2024 visit to Beijing, Brunei's Foreign Minister referred to China as a "good friend", reaffirmed his country's commitment to the 'One China policy', and voiced an expectation for China to demonstrate greater influence in international and regional affairs.[22][23][24] Brunei's complaints about China's claims to the South China Sea have also reduced.[25] Meanwhile, China's defence relationship with the country is improving, including a meeting between the Sultan and the Chinese Defence Minister.

The **US** does not have the same closeness in its defence relationship, and no real advantage in trade or digital infrastructure. However, if Washington decided that it wanted to (further) incorporate the Sultanate in its plans for the defence of Taiwan then there are a number of assets it could deploy there to strengthen its position. This is not assessed as a likely source of friction with the UK military position, at least while the current Anglophile Sultan remains on the throne.

Nonetheless, the UK's position in Brunei seems vulnerable. Given its position within the First Island Chain, it seems feasible that China may use its economic and technological influence to encourage Brunei to take its side – or at least to remove the military presence of the UK to reduce the threat of US involvement.

The fact that the UK has little economic exchange with Brunei aside from oil – or indeed, much of a relationship at all outside of the military-political context – means that China has more room to operate in-country. This, together with Brunei's strategic location and the fact that the Sultan is now 76, means that there is a substantial risk that the UK's standing in Brunei is compromised. If this compromise was escalated to Brunei asking UK forces to leave, and they were replaced by Chinese troops, this would create immense strategic damage to the US's defence of Taiwan. This in turn would almost certainly damage Anglo-American relations.

3.2 Kenya

Kenya is an important defence partner of the UK. It is also an increasingly significant one for the US, which designated the East African country a Major Non-NATO Ally (MNNA) in 2024, a legal status which confers various defence-related privileges but does not involve mutual defence commitments. Kenya has an extensive economic relationship with China, and Kenya's President Ruto has been keen to avoid being seen as taking sides with either China or the US, particularly following the country's designation as a MNNA.[26]

3.2.1 Defence Relationships

	UK	China	US
Military base	✓	✗	✓
Joint military training	✓	✓	✓
Bilateral defence ministry meetings	✓	✗	✓
Professional military education provided	✓	✓	✓
Naval visits	✓	✓	✓

Fig. 4. UK, Chinese, and US defence diplomacy and base hosting 2019-24 - Kenya.
Source: Adarga Research Institute research

Kenya is one of the **UK's** global defence hubs and is home to the British Army Training Unit Kenya (BATUK), whose role is to facilitate training for units preparing to deploy on operations or assume high-readiness tasks.[27 28]

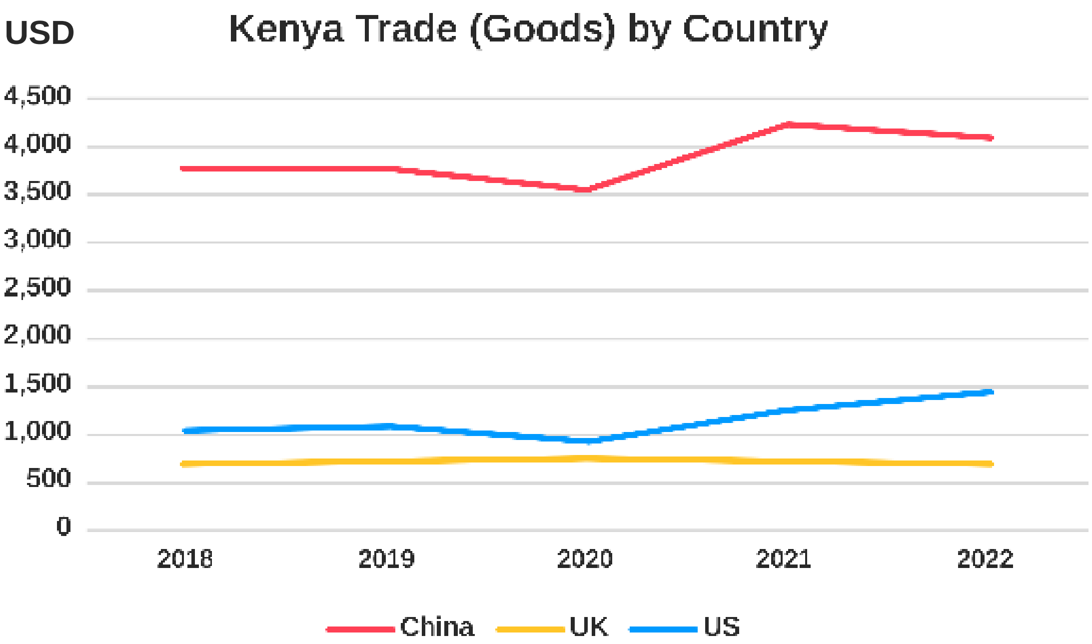
Between 2019-24 the two countries performed joint exercises, training, ship visits, and high-level military-political meetings. The UK has also helped establish the Kenyan Marine Commando Unit (KMCU) with the help of the Royal Marines.[29] As with Brunei, the UK did not sell Kenya any arms in that period, although the country has been chosen to test the UK-made near-space Zephyr glider, intended for use in military surveillance.[30] It should be noted that the British military presence in Kenya has also been strained by scandals, including alleged serious criminal behaviour by service personnel.[31 32]

Over the last five years the **US** has conducted joint exercises and training and provided professional military training. There are several US bases there. In addition, it has provided a range of equipment to Kenya, including body armour, artillery, and 24 armoured vehicles for use by Kenyan personnel deployed to Haiti.[33 34 35] The US has now designated Kenya as an MNNA, which is likely to generate more military benefits for the country.[36]

Whilst the most significant official Chinese defence relationship in the region is with Djibouti, **China** has quietly been building its defence diplomacy with Kenya. Although there is no sign of a ministerial level defence meeting since 2017, there have been other developments, such as the 2023 announcement that the Kenyan Armed Forces would now be learning to speak Mandarin.[37] China also trains and supplies Kenya's paramilitary National Youth Service, aimed at 18-24 year olds.[38] The head of the national Joint Command and Staff College was educated in China. No arms were sold to Kenya by China[39] in the period studied.

US officials have warned that China is considering a base In Kenya.[40] It is widely reported that the PLA already operates tracking, telemetry, and command stations in the East African country, although it should be noted it seems unlikely that China would use this as a wider military facility (such as for housing troops and armoured vehicles).[41]

3.2.2 Trade, Finance, and Infrastructure Provision



	2018	2019	2020	2021	2022
China	3,770.76	3,738.92	3,539.48	4,225.29	4,073.77
UK	707.92	709.18	750.43	752.92	668.11
US	1008.60	1068.00	940.70	1243.70	1447.50

Fig. 5. Kenya's trade in goods with China, the UK, and the US, 2018-2022 (millions of USD).
Source: WITS (World Bank)

Kenya maintains strong economic ties with the **UK** as well as with **China** and the **US**. All three countries have committed to investments in Kenya's development, in areas ranging from infrastructure to agriculture to technology. China's infrastructure investments are most well-known and well-established, given the country's capacity and long-term efforts to cultivate close relations with Kenya as with other African countries via initiatives such as Belt and Road. However, it should be noted that as of 2022, the UK was the largest owner of FDI stock in Kenya, valued at 261.1 billion Kenyan Shillings (USD 2.02 billion).[42]

There are two major UK banks present in Kenya, compared to a more limited presence by Chinese and US banks.

	UK	China	US
Bank Presence	Standard Chartered, Barclays	Bank of China	Citibank, JP Morgan Chase

Fig. 6. Presence of UK, Chinese, and US banks in Kenya. Source: Various

While it lacks the economic stature of China and the US, the **UK** plays an important role in investing in Kenya, including in new and emerging areas such as green technology. In April 2024 the British High Commission in Nairobi announced USD 8.1 million of funding for 50 green projects.[43]

The UK and Kenya have been party to a bilateral Economic Partnership Agreement since 2021, allowing duty-free and quota-free access to the UK market for Kenyan goods, principally tea, cut flowers, and fruit and vegetables – but Kenya then applied a 25% duty on UK wine, gin, and whisky (now rescinded) prompting a UK complaint. Other East African Community states have started the process of joining the EPA as of 2024.[45]
The UK has also played a role as a guarantor of loans, including a 9.6 billion Kenyan Shilling (USD 74 million) loan from the African Development Bank for power transmission network improvements.[46] In September 2024 the UK government announced a partnership with the Nairobi Securities Exchange to help further develop the country's capital markets.[47]

In the context of US-China strategic competition, the **US** has increasingly sought to catch up with China in terms of development and infrastructure provision in sub-Saharan Africa. Kenya's designation as an MNNA coincided with a flurry of announcements of new investments from US companies, including USD 250 million from the US International Development Finance Corporation, bringing its total portfolio in Kenya to over USD 1 billion; a 23 billion Kenyan Shilling (USD 178.4 million) investment by Coca-Cola in its Kenya operations over the next five years; and the signing of a USD3.6 billion agreement with Everstrong Capital to build a 440 km highway between Nairobi and Mombasa.[48 49 50] The US banking presence in the country has also been increased, with JPMorgan Chase receiving a licence to operate in 2024.[51]

However, these commitments should be contextualised in relation to China's provision of major infrastructure projects and development finance; **China** has put USD 155bn into African infrastructure over the past 20 years, and pledged an additional USD 50bn in new projects at the 2024 Forum on China-Africa Cooperation.[52 53] Infrastructure projects such as Mombasa-Nairobi Standard Guage Railway and other transport links align with Chinese economic interests including facilitating the transport of key raw materials.[54] While these projects have led to significant debt (USD 6.3bn as of December 2023, almost 20% of total external debt) – something that became a significant issue in the 2022 election – President Ruto has maintained engagement with China.[55] Under his leadership Kenya has formally applied to join the China-led Asian Infrastructure Investment Bank and is lobbying for further investment in other areas.[56 57 58]

3.2.3 Digital Infrastructure and Technology

Kenya relies on Huawei for 5G infrastructure, alongside other telecoms projects and the provision of fibreoptic cables.[59] The country also hosts a CORS ground station for the BeiDou Global Navigation Satellite System, used by Kenya for land mapping.[60] There is however no indication that the country uses BeiDou for military applications, relying still on GPS. **China** is working with Kenya on other digital projects, including plans to build Konza Technopolis, a smart city focused on the ICT, life science, and engineering sectors.[61 62]

At this time no critical **US**-sourced digital infrastructure has been identified in Kenya, although there are reports that the US is investigating Kenya's ability to act as a partner in the decoupling from China of semiconductor supply chains. There are further reports that **US** firms like Microsoft are looking to build data centres in the country, and that Google is looking to anchor an African-Australian fibre optic cable there.[64 65]

The **UK** has fostered the development of the digital sector in Kenya as elsewhere in Africa, with some success. M-Pesa, which was set up two decades ago through an initiative run by the Department for International Development, in conjunction with the British telecoms giant Vodafone, is the country's most popular digital payments platform. However, unlike China, the UK is assessed to be unlikely to use any leverage here to strategically influence Kenya.

3.2.4 Overall Assessment of the Risk of Compromise of UK's Defence Relationship with Kenya: Moderate

Kenya is a major defence hub for the **UK**, but unlike Brunei there is more to the relationship than just the military and oil. There are good links in development investment, FDI, and finance, and British organisations from different sectors are active in the country.

The recent announcement that Kenya is now an MNNA of the US might be a challenge for the UK's military position. While it is unlikely that the US will press for UK disengagement, the military focus of MNNA status and the higher number of assets the US can theoretically bring to the country may mean that the UK military relationship might be squeezed out. The fact that the **US** provides military hardware whereas the UK only provides less 'sticky' training gives the US an advantage in the permanence of its military relationship. Whether or not directly linked to the MNNA announcement, there has been an increase in recent US economic activity in Kenya that reinforces Washington's links with the country.

China's relationship with Kenya is based mainly on increasing economic ties. There are also political ties and attempts to cultivate a military relationship. Kenya's position on the Indian Ocean is of strategic interest to Beijing and it is likely that it will attempt to continue to foster stronger links. The fact that President Ruto has signed an agreement making his country a US MNNA does indicate that he is trying to balance his country between the Great Powers.

With the BATUK coming up for renegotiation, London needs to ensure that Nairobi's relationships with Beijing and Washington do not eclipse British interests. Given the wider UK involvement with Kenya there is a usefulness (and therefore influence) above and beyond the military-political context. Whilst the threat of compromise is lower than for Brunei, China's strong strategic interests, and the new US MNNA status, leave the UK's position moderately compromised.

3.3 Oman

The Middle East is becoming a centre of Great Power tension. The US's dominance in the region is coming under increasing pressure from China, and indeed Bahrain, Qatar, Saudi Arabia, and the UAE are dialogue partners of the Shanghai Cooperation Organisation (SCO) and the China-Arab States Cooperation Forum.[66] Oman, which has a strategically vital position at the entrance to the Persian Gulf, is being drawn into these geopolitical challenges.

3.3.1 Defence Relationships

	UK	China	US
Military base	✓	✗	✗
Joint military training	✓	✓	✓
Bilateral defence ministry meetings	✓	✓	✓
Professional military education provided	✓	✗	✓
Naval visits	✓	✓	✓

Fig. 7. UK, Chinese, and US defence diplomacy and base hosting 2019-24 - Oman.
Source: Adarga Research Institute research

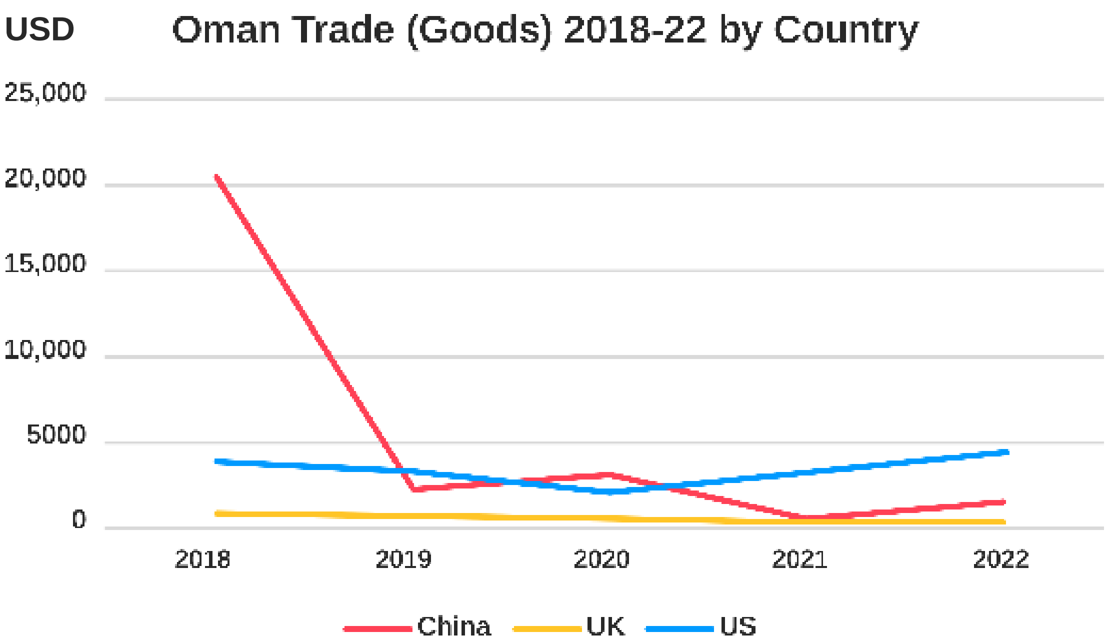
Oman is one of the **UK's** oldest allies in the Middle East, a relationship that stretches back more than two centuries. The current Sultan, Haitham bin Tariq, has strong relations to the UK having studied at the University of Oxford, and he sent his son (the Crown Prince) to Sandhurst.[67]

UK military personnel still provide a notable level of support to the Omani forces. The country serves as one of the global hubs of the UK military.[68] It is also home to the UK Joint Logistics Support Base in Duqm, a deep-water port that can accommodate the largest Royal Navy ships, and a major British Army training area.[69] Oman is important for UK operational deployments in the wider region, for example to Afghanistan. Between 2019-24 the two countries performed joint exercises, training, ship visits, and high-level military-political meetings. The UK sold a number of missiles to Oman in the period studied, one of only two arms purchases recorded by Oman in total.[70]

Over the last five years the **US** has conducted joint exercises and training and provided professional military training to Oman. Although there is only a limited US presence in the country, there have been high-level military-political meetings and a small number of UAVs sold.[71] [72] However, while Oman is a vital partner for US operations in the Middle East, the Israel-Gaza conflict has led to tensions in the relationship, particularly regarding the possibility of US operations against Iran, with which Oman retains working relations. Along with Kuwait, Saudi Arabia, and the UAE, Oman moved in April 2024 to prevent US military aircraft flying over its airspace in the event of US operations against Iran.[73]

China's defence relations with Oman have increased in recent years. In 2023, Beijing sent the 44th Chinese Naval Escort Taskforce on a goodwill visit to the country, which was concluded with joint training with the Royal Omani Navy.[74] In 2022 the Chinese Defence Minister, Wei Fenghe, visited the country seeking to increase defence ties.[75] China has also engaged in military counter-terrorism exchanges with Oman and other Arab states, including Qatar and Saudi Arabia.[76] No arms were sold to Oman from China in the period studied, although there are reports that Beijing has held talks on opening a military base in the country.[77]

3.3.2 Trade, Finance, and Infrastructure Provision



	2018	2019	2020	2021	2022
China	20,408.52	2,213.49	2,853.39	460.35	1,350.21
UK	647.08	584.83	411.89	47.28	257.31
US	3684.60	3082.70	1943.30	3146.10	4196.00

Fig. 8. Oman's trade in goods with China, the UK, and the US, 2018-2022 (millions of USD).
Source: WITS (World Bank)

	UK	China	US
Bank Presence	Standard Chartered	Nil	Nil

Fig. 9. Presence of UK, Chinese, and US banks in Oman. Source: Various

The **UK** has an advantage in Oman when it comes to banking and finance. No Chinese or US banks are licensed to operate there, whereas the UK's Standard Chartered has a long-standing presence. In addition, the UK was the leading source of FDI in Oman in 2022, at USD 24.9 billion to the US's USD 9.6 billion and China's USD 2.6 billion (of a total of USD 70.4 billion).[78]

The **US** has a free trade agreement with Oman (since 2009) and is one of Oman's leading trade partners. US FDI into Oman doubled in the decade following the agreement's signing.[79] Despite this, the US does not have much of an economic advantage over the UK in Oman.

China engages with Oman bilaterally and through multilateral forums, including cooperation on energy via the Gulf Cooperation Council, but also with an emphasis on finance, technology, aerospace, and cultural exchange[80] Chinese projects in Oman include those in energy, mining, electricity generation, and IT and communications. China is the largest importer of Omani crude oil, and overall trade between the two countries is increasing, having grown 8% year-on-year in the first five months of 2024.[81] [82] [83]

3.3.3 Digital Infrastructure and Technology

China is an important provider of digital infrastructure to Oman. The country's 5G network relies on Huawei, with which Oman also cooperates on AI development and which partners with local telecom provider Ooredoo to provide 5.5G across the Middle East.[84]

Oman uses BeiDou for land mapping, environmental monitoring, security, and transport systems.[85] There is however no indication that the country uses BeiDou for military applications, relying still on GPS.

There is no identified provision of strategically important digital infrastructure by the **US** or **UK**.

3.3.4 Overall Assessment of the Risk of Compromise of UK's Defence Relationship with Oman: Light

The **UK's** military relationship with Oman is tight, and structurally important not least because British officers are still integrated into local forces. Economically, the UK is a major player in Oman, and although the US and in particular China are doing more with Oman, neither have much of an advantage overall. One area of much stronger exposure to China is in digital infrastructure, where the UK and US are effectively not present.

In sum, the UK's military relationship with Oman is well entrenched and is supported by wider economic involvement. The Sultan also has close links to the UK. **Chinese** and **US** involvement in the country is increasing, but there is no indication that either are close to eclipsing British interests.

04.

Towards a Systematic Approach to Britain's Strategic Alliances

The UK is at an inflection point in its approach to building a 21st century strategy and capability for deterrence, defence, and growth. Divorced from the European Union but a continued key contributor to NATO, and providing vital support to Ukraine, the UK has to develop a new approach that leverages its strengths for maximum returns. This requires the UK to view its alliances holistically, with a greater understanding of the wider ecosystem in which they sit, and how the UK can add value within these ecosystems to further consolidate its relationships. Whether it be through facilitating academic exchanges, bolstering infrastructure, or redoubling commitments to share defence development, these alliances need wider nurturing to withstand the pull of today's geopolitical currents.

Firstly, the UK needs to increase its capacity to understand the nature of its defence partnerships as part of its core foreign policy and strategic ambitions. The Tony Blair Institute recommended earlier this year in its paper, Reimagining Defence, that the Government establish an Integrated Defence Strategy Team in Number 10. One of the proposed tasks for such a team is a review of the state of the UK's alliances, and in particular its defence partnerships. This would be conducted through a dedicated alliances and international partners unit to provide an ongoing assessment of the state of the UK's alliances to ensure they are fit for purpose and aligned to the country's overall defence strategy.

Secondly, in the context of the ongoing Strategic Defence Review it is proposed that the Government undertakes a specific systematic, multi-dimensional audit of the UK's alliances. This would provide the basis for level recommendations on what alliances the UK needs and the levers to deepen these. Engaging with a team of external experts, including potential commercial investors and delivery partners, to provide recommendations of targeted action for each alliance, would enable the Integrated Defence Strategy Team to redesign a strategy that could increase the UK's defence posture whilst increasing its prosperity and global relevance.

Thirdly, a systematic and strategic review will enable the UK to identify areas in which they may not be able to fill the gap, but could work with key global partners from the EU, NATO, and AUKUS to grow and maintain influence in these strategic locations. This will be crucial for cementing alliances and capabilities for the long term.

The UK continues to occupy a unique place in the hearts and minds of many of its key allies, but this cannot be taken for granted. Defence partnerships will be tolerated and supported with greater investment into the areas in which they are physically present. By identifying the areas in which the UK can bolster these relationships via its strengths, whether trusted financial services or access to education, the UK can translate its soft power to be a leading example of a smart power holding its own between superpowers.

05.
Appendix

5.1 Adarga's Country Influence Index Model

Adarga's previous research has shown the importance of taking into account a broad range of factors underpinning influence, including economic ties via trade and investment, and technology cooperation and dependencies including via digital infrastructure provision.[86]

This approach – which has been tried and tested with various bodies, including a key UK government department – is based on Adarga's Country Influence Index (CII) methodology. The aim of the CII is to assess the degree to which China can use its Structural Influence over a target country to compromise the autonomy of that country.

'Structural Influence' is defined as the degree to which an influenced country's decision-making must take into account the interests of an influencing country; vectors of Structural Influence include trade dependencies, security obligations, and reliance on technology provision.

'Autonomy' is defined as the capacity of the targeted country to make decisions without accounting for an influencing country's strategic goals.

In this paper we use a slimmed-down, 'light' version of the CII so as to provide a quicker assessment using the most important indicators, as described in 2.3:

- Defence relations - operational base locations, defence diplomacy, joint exercises, and arms sales.
- Bilateral trade and the presence of banks.
- The provision of digital infrastructure - with a focus on 5G provision by Huawei, and the adoption of BeiDou, China's satellite navigation system rival to the US's GPS.

5.2 Adarga's Technology and Data

The data used in the analysis was drawn from Adarga's curated geopolitical dataset, one of the world's largest. This draws from the following sources:

a) Publicly available quantitative datasets and data derived therefrom (such as IMF import and export datasets)

b) Publicly available unstructured data retrieved and processed via Adarga's Vantage software, such as government announcements, media reports, and research papers.

c) Datasets compiled by Adarga based on unstructured data of the kind noted in point b) (such as frequency and nature of diplomatic engagements)

Vantage is Adarga's information intelligence software, which leverages its proprietary GenAI and NLP capabilities to accelerate and enhance research.

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