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Canada at Economic War: The 360-Degree Threat

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Key Points

- → Hostile states have undercut the power advantage that secured the United States and its allies by amassing coercive military and economic power. Economic warfare has been central to their success.
- → With deterrence failing, the United States is readying itself for the prospect of today's economic war sliding into hot war between major powers. To secure itself, it will act unilaterally in defence of its own national interests, including at the expense of its allies/partners (see Box 1).
- → Insofar as Canada's place in the emerging global order will depend in large measure on its ability to build strategic leverage and contribute power to the pushback against Russia and China, developing a Canadian Defence Industrial Strategy (CDIS) is an urgent national priority.

Introduction: Understanding the 360-Degree Threat

The conduct of war has changed. In addition to contesting traditional military threats, the United States and its allies/partners must now also contend with incessant *below-threshold* attacks¹ targeting their societies and economies. The hostile states are using all instruments of national power in these attacks diplomatic, information, military and economic (DIME). Among other activities, their attacks include interfering in foreign elections to promote preferred policies and politicians (diplomatic); spreading propaganda to discredit critics (information); disguising military operations as civilian activities to gather intelligence and harass weaker states with physical force (military); and using economic tools to coerce foreign governments and to steal industrial/military secrets (economic). Hostile states are especially active in their economic attacks as they understand the symbiotic relationship between economic and military power: in today's highly integrated global order, economic activities give them easy access to the technologies and industrial power

That is, attacks that are calibrated to fall below the threshold at which a targeted state would take effective action to defend itself.

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they need to build the coercive military strength that, in turn, backstops their economic warfare.²

The blending of traditional military threats/ hostilities with below-threshold attacks has created a 360-degree threat environment where every form of national power is a potential weapon and near everything is a potential target. The forces that gave rise to this reality were set in motion at the close of the Cold War when the United States stood alone as the sole superpower in the international order. Secured by US power at its zenith, confident in the stability of the global order and anxious to exchange the costs of defence for the riches of a globally integrated economy, the Western powers opened their societies and economies to hostile states while simultaneously letting their militaries fall into relative decline. The hostile states — China under the Chinese Communist Party (CCP) chief among them — capitalized on this complacency to amass the coercive power that they now rely on to impose their will on weaker states (by military force, if necessary), and to execute below-threshold attacks against the United States and its allies/ partners as part of their broader efforts to reshape the global order in support of their authoritarian regimes and geopolitical ambitions.

The Traditional Military Component of the 360-Degree Threat

In the military domain, the adversaries' success in building coercive power is stark. In 2022, Russia ended some 70 years of interstate peace in the Euro-Atlantic region when it unleashed a war on Ukraine that is punctuated by nuclear threats and includes below-threshold attacks on North Atlantic Treaty Organization (NATO) allies. Mapped by the US Helsinki Commission in its 2024 *Spotlight on the Shadow War* report, nearly 150 hostile attacks on NATO territory have been attributed to (or suspected of being executed by) Russia as part of its war on Ukraine. The attacks fall into a handful of categories: critical infrastructure attacks, violence campaigns, weaponized migration, election interference and information campaigns

² See the first policy brief in this series (Garbers 2025a).

(US Helsinki Commission Staff 2024). The military threat in the Indo-Pacific is also escalating. From the South China Sea to the East China Sea, the Taiwan Strait and the Himalayas, China is using its military power to harass and intimidate its neighbours, enforce its illegitimate territorial claims, destabilize security in international waters and steal critical resources. North Korea and Iran are similarly undermining global security. North Korea is progressing its nuclear program in its ongoing campaign against South Korea, while Iran's support for armed militant groups helped spark the Israel-Hamas conflict.

Box 1: Expect US Unilateralism to Rise

The United States has been calling on its allies/partners for a decade to recognize the gravity of the threat and made clear years ago that it is no longer able nor willing to carry an overwhelming share of the costs for collective defence. With the hostile states rapidly eroding the power gap on which deterrence relies, there is a growing risk that the United States will act unilaterally in defence of its own national interests, including at the expense of its allies/partners — in particular those who are seen as freeloading on US security guarantees while enriching themselves by doing business with the CCP (and, by extension, de facto supporting the CCP's economic warfare against the United States and its military power).

To enhance their military leverage, the hostile states are progressively acting in concert. In a recent report, the US-China Economic and Security Review Commission (2024) set out China's most meaningful collaborations. First, as a "decisive enabler" of Russia's war on Ukraine, China has provided Russia with satellite imagery, dual-use goods for its military production lines and financial lifelines to counter the effects of international sanctions designed to erode its economic ability to wage war. Second, long known to be the economic big brother to North Korea, China is now also supporting Iran's economic ability to aggress others in that its oil purchases account for some 90 percent of Iran's state budget, money used by Tehran to finance terrorist groups. Third, China is providing critical support to Iran's drone and ballistic programs, which, in turn, are producing components that find their way into weapons used by both Russia and the Houthis. According to NATO, North Korea and Iran are also underwriting Russia's war against Ukraine, in their case by providing direct military supports, such as munitions and uncrewed aerial vehicles.³ North Korea is also now providing troops to Russia. Russia, in turn, is allegedly repaying its sponsors with military technology, equipment and training, as well as cheap energy that fuels military production lines.

In much the same way as Russia and China calculate that their military strength makes it possible for them to harass and attack weaker states, they similarly understand the much greater risks they would face in a direct conflict against the United States and its allies/partners. To escape that restraint, both are continuing to invest in their military power.

As set out in Canada's new defence policy, Our North, Strong and Free: A Renewed Vision for Canada's Defence, Russia holds offensive cyber, space, information and conventional and nuclear missiles able to challenge the security of NATO's eastern boundaries, as well as its western and northern flanks. Moreover, despite its losses in Ukraine, Russia "remains highly capable of projecting air, naval and missile forces across Europe, as well as to and through the Arctic to threaten North America" (Department of National Defence 2024, 7). China, for its part, emerged as a (near) peer military competitor to the United States in just a few decades. In line with its determination to unify with Taiwan — by force, if necessary — it is focused on preparing for conflict with the United States in the Indo-Pacific. Its plan for doing so includes growing its arsenal of ballistic and cruise missiles, and strengthening its air defence systems, maritime forces and electronic warfare assets (US-China Economic Security Review Commission 2024). Insofar as Canada is at once an Arctic, (Euro-) Atlantic and Pacific state, it has direct stakes in preserving the peace in all three theatres.

While both Russia and China pose serious military threats, China's (near) peer status makes it the so-called pacing threat. The threat is amplified

³ See www.nato.int/cps/ra/natohq/topics_50090.htm.

by factors that go beyond a simple one-for-one capability contest (Eaglen 2024). In particular, whereas US military power originates on the other side of the world and is spread across the globe in line with its homeland defence and alliance obligations, China's power is concentrated in a single region, the Indo-Pacific, where it holds a home base advantage. China also holds an advantage over the United States in terms of manufacturing capabilities that can be retooled for military industrial production in the case of a traditional hot war. And unlike the US military, which faces spending limits for fiscal and domestic policy reasons, the People's Liberation Army (PLA) profits from the CCP's economic warfare activities (for example, forced technology transfers) and its civil-military fusion program, which compels the broader national economy to support military development (US Department of State 2020). As the US-China Economic Security Commission (2024, 30) has warned in stark terms, all things considered, the outcome of a US-China contest in the Indo-Pacific "is far from certain," Worse still, active conflict requiring a US response could erupt simultaneously in both the Euro-Atlantic and the Indo-Pacific. Insofar as both regions anchor their defences in US power, a two-front war could see either region left to its own inadequate defences if the United States determines that it needs to concentrate its capabilities in the other region. For Russia and China, the two-front scenario may be judged a strategic opportunity to divide and conquer US power. For allies and partners, it means that each region has a direct stake in shoring up the defences of both itself and the other region. For Canada, it means that we must also reinforce defences in the Arctic region, which is both a strategically important, resource-rich region and a bridge between the Euro-Atlantic and the Indo-Pacific.

The Below-Threshold Component of the 360-Degree Threat

All states routinely use the coordinated application of their instruments of national power (DIME) to change the calculations and activities of other states. As in the world of espionage, however, responsible states respect established norms regarding the conduct and limits of what is de facto routine statecraft. Hostile states do not. The relationship between their out-of-bounds belowthreshold attacks and full-scale war is abundantly clear: below-threshold attacks gradually erode the political will, industrial power and military capability needed to mount a credible military deterrent to war, just as credible military power and the will to use it — deters the most hostile below-threshold attacks in the first instance.

Deliberately crafted to fall below the threshold that would cause a targeted state to respond in a meaningful way, below-threshold attacks are executed in ways that:

- → disguise their hostile intent;
- → make progress only incrementally;
- → exploit human traits (greed, fear and so on); and
- → are highly agile (for example, economic attacks are used to enhance/degrade military capabilities).

In all cases, China is the most active and effective threat actor.

Attacks using *diplomatic* power are described as having two principal functions: to reshape global governance in favour of authoritarian states and to coerce the political decision making of a targeted state. On international governance, Kristine Lee and Alexander Sullivan (2019) at the Center for New American Security have detailed the CCP's tactics for enhancing its influence. They include securing leadership positions and sending civil servants to work in key UN offices, as well as establishing alternative platforms for global cooperation under CCP control (for example, the Asian Infrastructure Investment Bank and the Belt and Road Initiative). Whereas the CCP's governance ploys are not well known, its political coercion of individual states has at times gone viral. Canadian examples are near-identical to those experienced by many of our allies/partners. In leaked intelligence, media reports and testimony presented at the Public Inquiry into Foreign Interference in Federal Electoral Processes and Democratic Institutions (PIFI),⁴ attacks attributed to the CCP include allegedly interfering in political nomination processes; harassing

⁴ See foreigninterferencecommission.ca.

diaspora communities with threats against themselves and their families in China (including via so-called CCP police stations operating in Canada); and taking Canadians hostage with a view to using them as political bargaining chips.⁵

In their *information* operations, hostile states are accused of manipulating facts, perceptions and beliefs. Examples attributed to the CCP (again, presented at PIFI or elsewhere) allegedly include using disinformation campaigns to discredit political candidates deemed "anti-China"; describing efforts to raise awareness of CCP aggression as racist attacks; and spreading pro-CCP narratives via local Chinese language media. Grouped under the information domain, the unrelenting cyberattacks from all the hostile states give them the ability to sabotage communications channels, conduct espionage and plant the capability to disable the critical assets on which allies rely in times of crisis or conflict.

Although Russia and China primarily concentrate below-threshold attacks using their *military* power in their immediate regions, Canada has nonetheless been targeted. In August 2024, the Department of National Defence confirmed to media that China is "exploring Arctic waters and the seafloor, probing our infrastructure and collecting intelligence [and we are seeing] a growing number of Chinese dual-purpose research vessels and surveillance platforms collecting data about the Canadian North that is, by Chinese law, made available to China's military" (Dupuis quoted in Brewster 2024). In the Indo-Pacific, China uses coast guard ships and fishing boats as de facto military assets to press contested claims and seize territory. Most notably, China effectively annexed international waters in the South China Sea through a series of incremental attacks: territorial claims followed by paramilitary vessel activity to enforce the claims, and eventually the construction of artificial islands, which it later militarized. Using the same below-threshold playbook, Russia used proxy forces in its 2014 attack on Crimea, which, in turn, was the prelude to its 2022 war on Ukraine.

As the final element of the DIME construct, economic warfare is used to corrupt the global economic order in favour of authoritarian

states; weaponize economic interdependencies; and aggressively target the foreign assets and technologies essential to military power. The tool kit includes unfair market practices; currency distortions; financial punishments and inducements; and the savvy abuse of investment, trade and other economic activities. In Canada, examples of hostile economic acts near-identical to those of allies include imposing a ban on canola exports following the arrest of Huawei CFO Meng Wanzhou under a US extradition warrant (though China alleged the canola was contaminated by pests, the ban was lifted when the Meng case was resolved in negotiations between itself and the United States) (The Canadian Press 2022); providing financial support to preferred political candidates (Nardi 2024); financing malign collaborations with scientific research institutions (Tunney 2024); and attempting to buy rights/access into Canadian dual-use tech companies and other strategic assets via a range of often opaque investment activities (investments blocked under the Investment Canada Act include cases involving mining interests).

In its 2024 report, the National Security and **Intelligence Committee of Parliamentarians** (NSICOP) reviewed foreign interference attacks on Canadian democratic processes and institutions. The statecraft and examples it set out illustrate how below-threshold attacks typically include combinations of DIME tools. Commenting on the state of the foreign interference threat, NSICOP (2024) noted that "the intelligence community continues to assess that threat actors view Canada as a permissive environment...[due to the] persistent disconnect between the gravity of the threat and the measures taken to counter it." In its view, the lack of corrective action contributed to the crisis in which the government found itself "when unauthorized leaks of intelligence raised significant concerns about the state of foreign interference in Canada" (ibid.). Most concerning was the Committee's comment on the role played by some parliamentarians:

Unfortunately, the Committee has also seen troubling intelligence that some Parliamentarians are, in the words of the intelligence services, "semi-witting or witting" *participants* in the efforts of foreign states to interfere in our politics. These examples include:

⁵ See PIFI evidence and report (https://foreigninterferencecommission.ca/) and The Globe and Mail reporting on leaked intelligence (for example, The Globe and Mail 2023).

- → Communicating frequently with foreign missions before or during a political campaign to obtain support from community groups or businesses which the diplomatic missions promise to quietly mobilize in a candidate's favour;
- → Accepting knowingly or through willful blindness funds or benefits from foreign missions or their proxies which have been layered or otherwise disguised to conceal their source;
- → Providing foreign diplomatic officials with privileged information on the work or opinions of fellow
 Parliamentarians, knowing that such information will be used by those officials to inappropriately pressure
 Parliamentarians to change their positions;
- → Responding to the requests or direction of foreign officials to improperly influence Parliamentary colleagues or Parliamentary business to the advantage of a foreign state; and,
- → Providing information learned in confidence from the government to a known intelligence officer of a foreign state. (ibid., para. 164; emphasis in original)

As the Committee made clear — and as reinforced by media reports, expert testimony at PIFI, and leaked intelligence on years of warnings from Canada's security community — foreign states are waging active below-threshold war against Canada, and China under the CCP is by far the most aggressive threat actor.

In the 360-Degree Threat Environment, Military Power Is a National Priority

Full-spectrum war between the world's major powers is no longer unimaginable. The military and

economic power gap that the United States and its allies/partners rely on to deter hot war has been eroded by the hostile states' military modernization programs and highly sophisticated below-threshold campaigns, in particular their economic warfare. As deterrence erodes, the risk of hot war grows (be it by accident or by design).

Seized by the urgency to restore deterrence, successive US administrations have transformed the US approach to collective defence. Moving from quiet diplomatic requests to gentle public appeals, frustrated warnings and now provocative declarations, the United States is abundantly clear that it is no longer able nor willing to carry an overwhelming share of the costs of collective defence. Confirming that Democrats and Republicans are remarkably aligned in their understanding of the threat and strategic game plan, the sweeping reforms made to the US security and defence posture under the first Trump administration were meaningfully reinforced and extended under Biden. It was to be expected that the second Trump administration would move quickly to set in motion the next wave of reforms. Unimpressed with the traditional diplomatic mindset that it blames for allowing the threat to reach this point and determined to act fast to arrest the growing risk of an eventual hot war between major powers, the United States will increasingly act unilaterally in defence of its national interests, including at the expense of its allies/partners. This is particularly so with respect to those that are judged by Democrats and Republicans alike to be freeloading on US security guarantees while enriching themselves by doing business with the CCP (and, by extension, de facto supporting the CCP's economic warfare against the United States and its military power).

Canada stands on the frontlines of the rapidly deteriorating global security order, and the US response to it. We are rich in the natural resources that fuel economic and military power. We are a leading power in military-sensitive technologies. And we are a "backdoor" to the United States geographically connected, deeply integrated into all elements of US national power and a core member in the United States' primary defensive alliances (the North American Aerospace Defense Command, NATO and the Five Eyes). As the United States accelerates its efforts to restore deterrence and ready itself for possible war, its priorities will include rebuilding its domestic manufacturing power and selectively decoupling the economic arrangements that made its innovation ecosystems, industries, critical infrastructures and democratic systems vulnerable to hostile attacks. Canada is uniquely well-placed to proactively shape this transformation by building its strategic leverage and positioning itself as the critical partner to the United States. Should we do so, we will secure the benefits that flow from mutual strategic interdependence in a new, more hostile global order where the United States is revising its economic partnerships in ways that will favour reliable, strategically important allies/partners. Should we do otherwise, we are likely to find ourselves made poor and weak by adversaries who exploit us ever more aggressively and by allies/partners who either move on without us in building their own more secure future or, worse, take steps to insulate themselves from us.

Insofar as our relationship with the United States and our place among allies/partners will depend in large measure on our ability to contribute credible military power to the pushback against Russia and China, developing a Canadian Defence Industrial Strategy calibrated to the 360-degree threat environment is now a strategic national priority.

Recommendations

War between the major powers is no longer unimaginable. To secure itself in the 360-degree threat environment, Canada must recognize the world as it is; build the economic/industrial model and military power demanded by the threat; and reset its relationships with allies and adversaries alike. Insofar as defence is a wholeof-society effort, most especially in a 360-degree threat environment, securing Canada demands immediate action on three fronts: developing a plan to maximize Canada's strategic leverage in relations with allies and adversaries alike; uniting Canadians behind the defence of Canada; and making them active partners in that defence. As such, this policy brief recommends:

→ A strategic plan to maximize Canada's leverage in the age of economic warfare. Specifically, there should be steps to "make the economy much more competitive" to build defences against economic pressure/warfare and attract safe investment and innovation; "unleash the resource sector to capitalize on trends such as re-shoring manufacturing and energy-hungry artificial intelligence; rebuild the industrial base to serve as a secure source of supply for our allies; secure the border with much-needed immigration and criminal-justice reforms; and rebuild the Canadian Armed Forces, at speed" (Garbers 2025b). These reforms must be coupled with measures to further strengthen Canada's economic security regime in line with changes by allies/partners. Failing to keep pace risks Canada being exposed to ever-greater economic warfare from adversaries and being treated as an unwanted and unreliable partner by allies.

- → A whole-of-government effort to rebuild Canadians' national pride and emotional attachment to Canada. A December 2024 poll by the Angus Reid Institute documents the starting point. Measuring the change from 2016 to 2024, it found that the percentage of respondents with a deep emotional attachment to Canada dropped from 62 percent to 49 percent, while the percentage feeling a sense of pride in Canada fell from 52 percent to 34 percent (Angus Reid Institute 2024). Among new Canadians, defined as those in Canada for less than a decade, pride in Canada was higher than the average of 34 percent but falling more precipitously; that is, it fell from 75 percent in 2016 to 46 percent in 2024 (ibid.). Against this backdrop, it is little surprise that a January 2025 poll found that 43 percent of Canadians aged 18-34 would vote to be American if US citizenship and the conversion of their assets to US dollars were guaranteed (Ipsos 2025). Reversing these trends is imperative to securing the country — where there is little national pride, unity or love of country, there is little will to defend it. Relevant initiatives in allied states include mandatory civics education; the active promotion of national values, pride and identity in the private and civil sectors; opportunities for (or mandatory) national service; and an emphasis on advancing unifying national identities/values in government programming.
- → An evergreen education campaign to give Canadians the knowledge they need to understand the 360-degree threat environment and to be active partners in the defence of their country. With important exceptions such as PIFI, efforts to raise public awareness have been largely limited to information sessions for select stakeholders, public consultations on

bespoke policies, and speeches designed to deliver specific messages. Ideas for expanding on this starting point include:

- Establish an independent agency (or program) dedicated to bringing together all aspects of the 360-degree threat environment in the conduct of its research, analysis, policy development and public outreach work. Freed of government limitations (capacity, knowledge gaps, departmental silos, political sensitivity and so on), it should work in continuous partnership with civil society, government, the private sector, academia and allied/partner counterparts and must prioritize consistent cross-country, multi-sector engagements to reach Canadians where they are.
- Declassify and publicize threat assessments prepared by intelligence analysts where the risk in doing so is operationally manageable (as the United States did in issuing warnings about Russia's invasion of Ukraine).
 Replace high-level reports on the generic threat environment with comprehensive, detailed annual reports on the capabilities, strategies/tactics, and hostile activities of key threat actors — China and Russia (ideally modelled on US reports such as the US-China Economic and Security Review Commission and the China Military Power Report).

The recommendations described above could be supported from savings harvested under a much-needed, broader public programming spending review (see Appendix). Finally, these recommendations complement those proposed in the first policy brief in this series, *Canada at Economic War: Setting the Scene*, which set out three essential preconditions for developing a CDIS. For ease of reference, they are included in the Appendix.

Appendix: Recommendations and Priorities from the First Policy Brief

- → A National Strategy for Canada: Canada should follow the UK example in conducting an integrated review (and reset) of the family of national strategies in which a CDIS must be implemented (the defence, industry, foreign/ trade and national security portfolios). A National Strategy for Canada (NSC) must be premised on a shift in mindset that begins with the understanding that Canada is in an economic war at risk of sliding into a full-scale major war, and that Canada must first prioritize its fundamental national interests. The NSC would ensure coherence between otherwise distinct strategies; establish clarity of purpose and a hierarchy of priorities to guide policy, resource and operational decision making across the sub-strategies; and promote maximum overall impact by overriding the delays and halfmeasures caused by competing departmental mindsets and missions.
- Executives for Canada: The global order is being shaped by active economic warfare as a prelude to readiness for full-scale war, with allies and adversaries alike building more exclusive innovation ecosystems, supply chains and trade/ investment arrangements. If it is to help secure Canada's national interests, and by extension its own operating environment, the private sector must help Canadian policy makers navigate the financial and business complexities of defencedriven shifts in the global economic order. To this end, private sector leaders who understand that prioritizing Canada's national interests is both an obligation of citizenship and essential to protecting their own corporate interests should self-organize into an Executives for Canada (EfC) association. Drawing on its own networks, expertise and resources, the EfC should conduct cross-sectoral research and analysis into how defence imperatives (as identified by military and geopolitical strategists) can be advanced through active economic measures that are specifically designed to strengthen Canada, support allies and create vulnerabilities for

adversaries. The EfC should additionally take the lead in building awareness of the emerging economic order across the Canadian private sector (business-to-business dialogues) and serve as a coordinating mechanism for confidential strategic dialogues between private sector experts, government officials and civil society representatives (that is, track 1.5 dialogues). In a 360-degree threat environment, these activities are all critical to building the industrial power needed to help secure Canada in a world at risk of sliding into full-scale war.

→ Public Service Reform: To create the enabling environment for both a CDIS and the NSC under which it should sit, the government should prioritize broad public service reform. The recommendations below are all directly aligned with advancing the NSC and EfC proposals:

- Establish a Defence Innovation Agency (DIA) led by private sector executives qualified in managing a multi-billion-dollar business to affect the Build (industrial) pillar of the CDIS. Supported by in-house expertise from the defence and security communities, the DIA would help steer decision making on the Protect and Compete pillars of the CDIS in close collaboration with government and private sector partners. Leaders in the EfC would be especially well-placed to be part of the DIA.
- Conduct a comprehensive program and spending review to identify resources to reallocate to the CDIS and other NSC priorities; ensure that fiscal policies are optimally designed to incentivize the economic growth needed to underpin the CDIS; and stimulate productivity/investment in the sectors key to the CDIS. The review should include expertise from former senior officials who understand the civil service but are no longer professionally engaged in it, as well as from private sector actors with strong business credentials.
- Reinvigorate the senior ranks of the public service by actively promoting exchanges with external bodies (including the EfC and defence industries) and by leveraging a percentage of positions for indeterminate external appointments. Personnel reform to advance the CDIS and otherwise renew the public service is required to infuse the ranks with

the new ideas, operating strategies and the external networks essential to moving beyond static consultations to meaningful whole-ofsociety inclusion on Canada's future.

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