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CONTENTS

- 02** Chinese Interest and Investment in Latin America and the Caribbean
by CW4 Charles Davis
- 07** China's Plan for a Peaceful Reunification with Taiwan
by CPT Hemaloto Tatafu
- 12** A Model for Western Interventions in Small Wars
by LTC John Georg
- 16** A Data Storage Issue: The Clash Between Electromagnetic Warfare and Signals Intelligence
by MAJ David Schott
- 20** Cognitive Warfare: China's Effort to Ensure Information Advantage
by CW4 Charles Davis
- 25** Toward a Better Understanding of China: *Wei Qi* and Its Reflections in Core Leaders' Foreign Policy
by CPT Ross Nikides

CHINESE INTEREST

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INVESTMENT IN LATIN AMERICA AND THE CARIBBEAN

by Chief Warrant Officer 4 Charles Davis

Thoughts and assessments expressed in this work are those of the author. Discussion of any particular country is only intended to provide general knowledge and facilitate thought. It does not necessarily reflect an official assessment of or U.S. position on that country.

Never before in modern human history has a state so powerful, so fundamentally put at risk the global institutional order, security, freedoms and prosperity of the rest, employing an approach that was so superficially benign, and disarming its targets from within by playing to their short-term material interests.

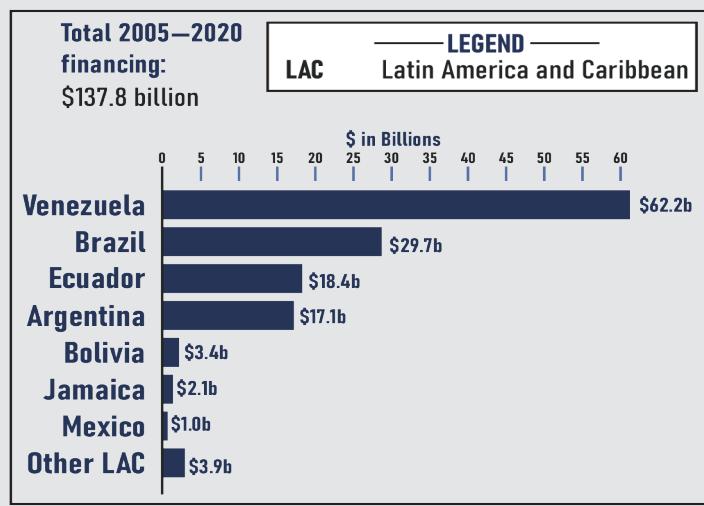
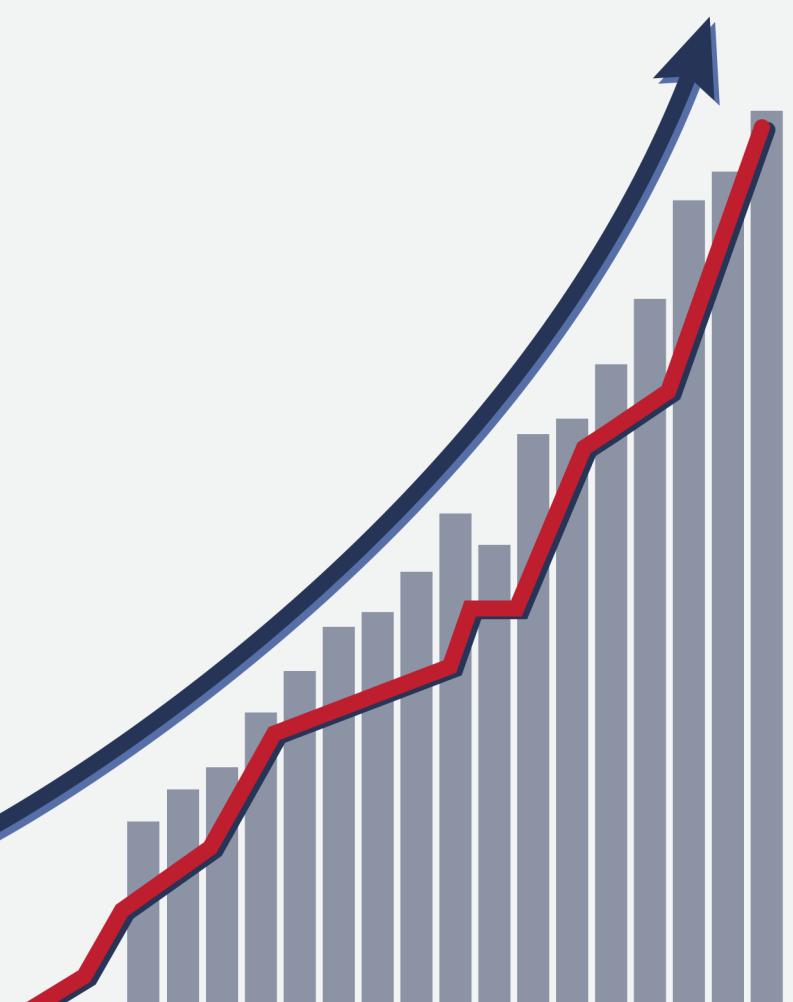
— Dr. R. Evan Ellis, Research Professor of Latin American Studies
U.S. Army War College Strategic Studies Institute

Introduction

In June 2022, the United States hosted its 9th Summit of the Americas; however, a summary Congressional Research Report indicates only 23 of the 35 member heads of state participated.¹ The decision to boycott by so many leaders hinged on President Biden's decision to exclude Cuba, Nicaragua, and Venezuela. While the leaders of those three countries are undesirable partners for the United States, the response from other Latin American countries reinforces a regional perception that the only interests that are a priority for the United States are their own.

Final commitments from the Americas Summit nest firmly in the Biden Administration's climate initiatives as it seeks to establish a resilient Caribbean region regarding natural disasters, catastrophic weather events, and migration. Though, on the geopolitical stage, China may be the big winner of this event it did not even attend. With every American misstep, China's influence in Latin America and the Caribbean (LAC) continues to expand.

Based on reports from the Green Finance and Development Center, of the 33 countries in LAC, 20 state leaders are committed to China's Belt and Road Initiative in the region.² Key among those participants are Argentina, Cuba, Venezuela, Panama, and Chile. While not a member, Brazil remains heavily tied to significant loan obligations.³ These economic ties did not occur overnight. The People's Republic of China (PRC) made significant inroads over the past 20 years while the focus of the United States was on the Middle East. Chinese trade in LAC continues to rise. In 2002, trade amounted to \$18 billion; in 2021, it reached \$449 billion.⁴



China: Financing in LAC, 2005–2020⁵

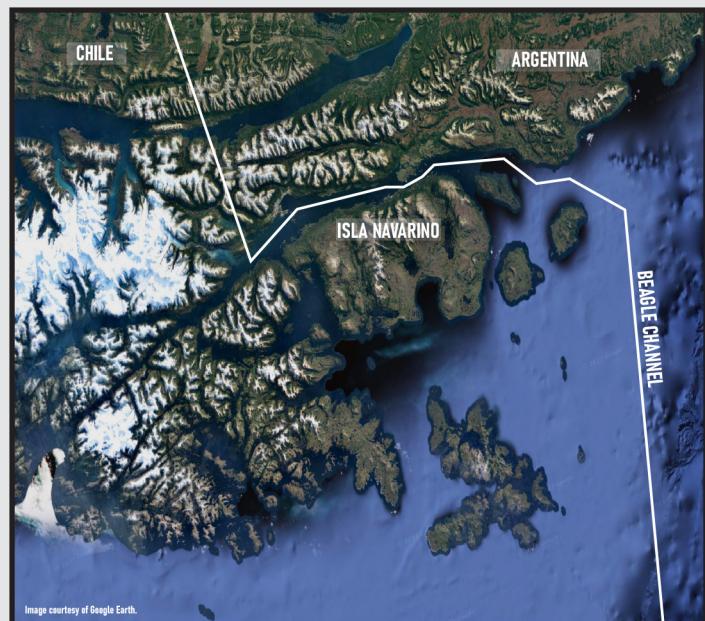
From 2005 to 2020, the PRC used state-owned China Development Bank and the Import and Export Bank of China to secure an estimated 99 loans at a staggering \$137 billion, with Venezuela, Brazil, Ecuador, and Argentina carrying 90 percent of that debt.⁶ These same institutions are the leading lenders in the region while China holds voting interest in local financial institutions like the Inter-American Development Bank and the Caribbean Development Bank.⁷ This financial strength has assured China's place as South America's top trading partner and primary lender in energy and infrastructure.

Regional Strategic Importance

The Council on Foreign Relations, an independent, non-partisan think tank, asserts that China has invested \$73 billion in LAC's raw materials sector since 2008, establishing refineries and processing plants for coal, copper, natural gas, oil, and uranium.⁸ The Council on Foreign Relations also indicates China's focus is now on the Lithium Triangle countries of Argentina, Bolivia, and Chile, which the PRC believes accounts for more than half of the world's lithium, a metal necessary to produce batteries.⁹

During a June 2021 conference on United States-China Strategic Competition, ADM Craig Faller, former commander of U.S. Southern Command (SOUTHCOM), highlighted the strategic importance of the LAC. He stated, "I look at this region, our neighborhood here as a region of real promise. The proximity, location matters, the distance to the United States is key. The people, those values associated with the people and the cultural connections."¹⁰ He further spoke of concerns regarding Chinese presence and influence across the continent, commenting on the port of Ushuaia (the furthest port in the southern hemisphere) and the Panama Canal. Both tie to key commercial navigation routes and are of significant interest to China. With Panama, a key Belt and Road Initiative partner, and Argentina, a significant investment partner of China, ADM Faller's concerns are well founded.

Dezan Shira and Associates, a Pan-Asian professional services firm, produces the Silk Road Briefing, which is an online publication focusing on China's Belt and Road Initiative globally. Their May 2022 assessment of Chinese interests in Ushuaia asserts that "Chinese involvement in the Beagle Channel would also mean that it would be capable of exerting some control of US commercial shipping both north and south of the South American continent."¹¹ The Panama Canal is operated with assistance from Chinese logistics firms on both ends of the canal at Margarita Island and the Colón Free Trade Zone.¹² Panama is also a member of the Belt and Road Initiative. Given China's claim to be a near-Arctic partner, its relationship with the Russian Federation on northern projects, and its interests and investment in Argentina and Panama, it seems likely China will be at least the gatekeeper, if not the key holder, to global commercial shipping access.



Map: South American Beagle Channel

In March 2022, at a hearing before the Senate Armed Services Committee, GEN Laura Richardson, commander of SOUTHCOM, addressed specific concerns regarding Chinese presence and influence in Panama over activities associated with the Panama Canal. GEN Richardson expressed concern that the United States has not invested in projects important to Panama. This has allowed the PRC to develop inroads with this key partner. She also addressed joint Argentina and PRC space projects, which allow the PRC to track United States satellites. GEN Richardson explained Beijing's ongoing investments in Central and South American infrastructure, particularly ports, follow the pattern linked to debt trap financing in Africa. Right now, the "Chinese have 29 port projects" across SOUTHCOM, including a major one in El Salvador that has economic implications for other Central American nations.¹³

Positives and Negatives of Cooperative Agreements

The Community of Latin American States (CELAC) provides additional insight into Chinese political influence in LAC. Founded in 2011 as a regional bloc of 32 member states, CELAC serves as an alternative to the Organization of American States (OAS), which is supported politically and economically by the United States. President Manual Lopez Obrador of Mexico serves as the organization's current president. He is pursuing an agenda to model that of the European Union and to negate the need for the United States led OAS. Affiliations with China, Russia, Turkey, and several Arab States support this vision.¹⁴

The China-CELAC Joint Action Plan for Cooperation in Key Areas addresses political and security cooperation as well as financial support. The plan includes initiatives on trade and

links the previously discussed financial organizations to future partnerships through the China-LAC Infrastructure Cooperation Forum. Other components of the plan emphasize agriculture, industry, and science and technology partnerships.¹⁵

One result of the PRC's sustained presence in these partnership organizations and LAC's growing reliance on Chinese financial institutions is that the PRC has shifted the region's relationship away from Taiwan. President Xi Jinping has visited the region 11 times since he took office in 2013, and now only 8 countries in the region still recognize Taiwan's sovereignty. The Dominican Republic and Nicaragua are the most recent countries to break ties with Taiwan.¹⁶ It is not surprising that Nicaragua would demonstrate a willingness to partner with China because its relations with the United States continue to deteriorate. In November 2021, President Biden addressed Nicaragua's presidential election by stating, "What Nicaraguan President Daniel Ortega and his wife, Vice President Rosario Murillo, orchestrated today was a pantomime election that was neither free nor fair, and most certainly not democratic."¹⁷

While the United States is experiencing the cost of deteriorating partnerships and projects across the LAC, the LAC states must also examine the cost of partnering with the PRC. Chinese technology is being used to bolster surveillance throughout the hemisphere. While this capability aids in fighting crime and monitoring natural disasters, it also provides data and intelligence collection to the PRC. Dr. Evan Ellis, research professor of Latin American Studies at the U.S. Army War College Strategic Studies Institute, suggests that integrators, such as Huawei, continue to leverage technologies, especially facial recognition and biometrics programs, nested in big data repositories. These technologies originate in the PRC where individual privacy considerations are minimal. China then offers this capability to LAC, "where insecurity, [and] the fight against corruption make Chinese solutions attractive"¹⁸ The United Kingdom, Australia, and the United States have already experienced the costs of allowing companies like Huawei access to national digital infrastructure.

As in every other region of the PRC's Belt and Road Initiative, engagements with the military follow the economic and political relationships. Dr. Ellis also notes that "for the [People's Liberation Army] PLA, engagement in Latin America supports multiple national and institutional objectives as a subset of its global engagement. One of the PRC's economic and strategic goals is building strong all-around relationships with countries in the region, which includes forging bonds with Latin American militaries."¹⁹ Just as with the United States military industry, the PLA's weapons sales allow for many continuing relationships through training, service contracts and equipment upgrades, and professional military education opportunities.

Defense is a key component of the CELAC Action Plan by incorporating a defense forum and fighting transnational organized crime, nuclear proliferation, and violent extremism. The plan also offers exchange opportunities for professional military education to LAC and includes opportunities for PLA members to attend jungle warfare instruction. Given how much the PRC uses their sub-Saharan playbook toward their goals in the LAC, the United States should take lessons from China's covert efforts to establish bases. For example, in the United Arab Emirates, classified satellite imagery led United States officials to conclude that the Chinese were building some sort of military installation at Abu Dhabi's Khalifa port.²⁰ Concerning Equatorial Guinea, the United States Department of State indicated, "As part of our diplomacy to address maritime-security issues, we have made clear to Equatorial Guinea that certain potential steps involving [Chinese] activity there would raise national-security concerns."²¹

Dr. Ellis also alludes to potential United States security concerns regarding the PRC's military goals nesting in infrastructure projects:

The PRC has also not, to date, sought to establish permanent military bases in Latin America, as some have speculated could occur as a product of construction work or port concessions going to Chinese companies in Panama, or through the port of La Union in El Salvador. Such caution in close proximity to the United States is consistent with PRC reluctance to acknowledge even the military character of its only current foreign military port facility, which is located in Djibouti, in Africa.²²

The PRC continues to lead with economics but will certainly shore up those efforts with its diplomatic and military elements of national power.

Of all the LAC countries, Peru has the region's largest Chinese diaspora community, amounting to about 5 percent of the population, or one million people. The PRC's presence in the LAC will only grow, and the United States will likely have to weigh the consequences of its limited interest in the LAC over the past 20 years. Dr. Richard Kilroy, Associate Professor, Department of Political Science, Coastal Carolina University, recently presented potential scenarios for the future of the OAS and CELAC at the Homeland Defense Academic Symposium. There is value in his argument:

For the OAS to maintain its relevancy in a changing global security environment, it needs to adapt and address the concerns of its member states. Lopez Obrador's call for CELAC to replace the OAS should not be dismissed. Rather it should serve as a wake-up call to the United States and the OAS bureaucracy to reimagine its future in the Western Hemisphere.²³

Key drivers for this preferred scenario would include—

- ◆ Reorganizing the OAS, possibly modeled after the United Nations Security Council, with six permanent members members (Argentina, Brazil, Canada, Chile, Mexico, and the United States) and eight rotating members (two each) from the sub-regions of the Caribbean, Central America, the Southern Cone, and the Andean Ridge.
- ◆ Relocating the OAS headquarters out of Washington, DC, to a more central location in the region, such as the former military facilities of SOUTHCOM in Panama.
- ◆ Establishing an office of military affairs to coordinate all aspects of military operations in the region from peacekeeping or peace enforcement to disaster response, pandemics, and actions to counter the transnational criminal threat.
- ◆ Empowering the OAS Secretary General with the ability to act both regionally and globally to expand interactions with other international governmental organizations in confronting transregional threats, including climate change and environmental security.²⁴

Conclusion

Regardless of the chosen path forward, the United States must reevaluate the level of national interest placed on what SOUTHCOM leaders have framed as our backyard. Foreign policy in the region must include not only what nests in the United States National Security Strategy, but also that which serves those relevant and specific issues of the member states of the LAC region.



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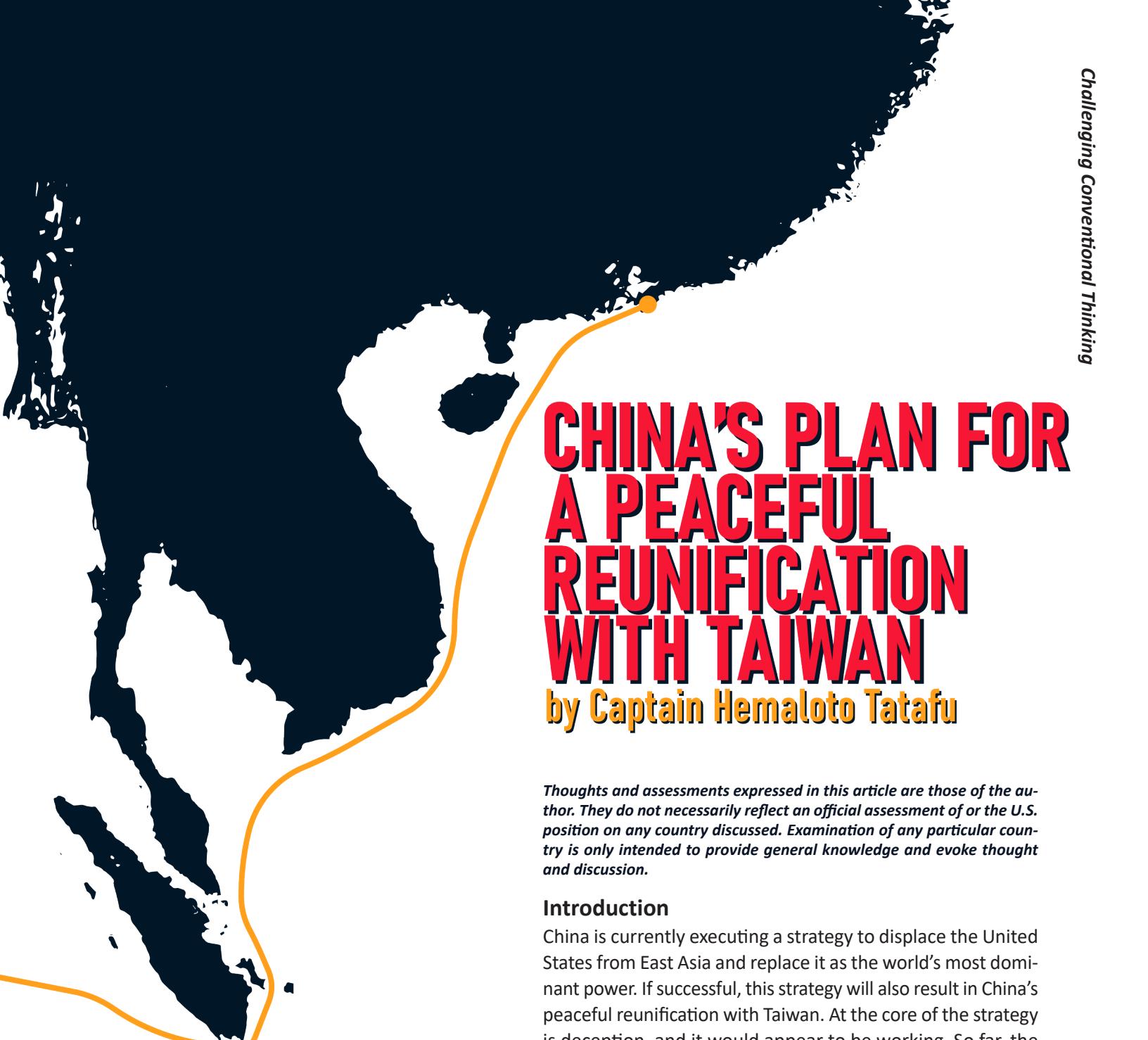
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CHINA'S PLAN FOR A PEACEFUL REUNIFICATION WITH TAIWAN

by Captain Hemaloto Tatafu

Thoughts and assessments expressed in this article are those of the author. They do not necessarily reflect an official assessment of or the U.S. position on any country discussed. Examination of any particular country is only intended to provide general knowledge and evoke thought and discussion.

Introduction

China is currently executing a strategy to displace the United States from East Asia and replace it as the world's most dominant power. If successful, this strategy will also result in China's peaceful reunification with Taiwan. At the core of the strategy is deception, and it would appear to be working. So far, the United States seems unable to correctly decipher the People's Republic of China's (PRC) closely held plan. According to the Center for Strategic and International Studies, 80 percent of the leading experts on China within the United States do not believe China has a coherent strategy for peaceful reunification with Taiwan.¹ This is very alarming because it could not be further from the truth. High-level government officials and experts not recognizing the existence of a PRC plan for peaceful reunification with Taiwan is a genuine problem. In my opinion, the United States government should reevaluate this assessment before we miss the window of opportunity to peacefully reverse China's progress.

The United States must have a firm understanding of the PRC's goals and plans to develop an effective strategy for countering China. Based on analysis of official Chinese Communist Party (CCP) speeches and writings, Dr. Rush Doshi argues in his book, *The Long Game*, that since 2017 China has engaged in efforts to secure both regional and global hegemony. China's regional goal is for an Asia that is dependent on China economically and divorced from United States alliances militarily.² Globally, China intends to "displace the United States as the world leading power by 2049."³

Michael Pillsbury, author of *The Hundred-Year Marathon*, convincingly argues that Chinese leaders derive modern-day strategy from lessons learned during the Warring States Period.⁴ Based on PRC activities to date, it is highly likely the main strategy for regional and global hegemony evolved from two approaches of that era: Besiege Wei to Rescue Zhao and Deceive Heaven to Cross the Sea.

The Warring States Period

(481/403 BCE – 221 BCE)

The Warring States Period is a roughly three century period when various rival Chinese states battled for territorial advantage. Eventually, the Qin state was victorious and established the first unified Chinese state. Likely because of the constant warfare, the period saw significant development in society, commerce, agriculture, philosophy, and arts. These developments set the foundation for the prosperity of Imperial China beginning with the Qin dynasty in 221 BCE.⁵

Besiege Wei to Rescue Zhao

The strategy Besiege Wei to Rescue Zhao is likely how China intends to peacefully reunite with Taiwan and displace the United States military from East Asia. During China's Warring States Period, the State of Wei attacked the State of Zhao.⁶ Zhao asked the neighboring State of Qi for help. Qi sent General Tian Ji and 8000, men to help Zhao. General Tian Ji wanted to attack Wei's superior army head-on, but his advisor recommended he instead attack Wei's vulnerable capital. When the Wei army heard of the attack on its capital, they rushed home. General Tian Ji and his men ambushed the superior Wei army who were exhausted by the forced march home, which freed Zhao.

In today's context, the United States is Wei, Taiwan and East Asia are Zhao, and Qi is China. The United States will continue to dominate East Asia as long as the status quo remains. To influence a change in the status quo, China must militarily threaten the bottom line of the United States: the security of the United States homeland. This will create discord in the United States and cause the populace to demand that political leaders bring forces and equipment back to protect the homeland, giving China military control over East Asia.

Imagine, for example, the public reaction in the United States if the Bahamas, Antigua and Barbuda, and Cuba simultaneously announced the permanent stationing of a People's

Liberation Army (PLA) Navy aircraft carrier strike group at their ports leading up to the 2036 United States elections. The PLA Navy carrier strike group could then patrol the Strait of Florida and the Yucatan Channel every time the United States Navy transits the Taiwan Strait, threatening commerce coming in and out of ports in Texas, Louisiana, and Florida. Unlike the Cuban Missile Crisis of 1962, the PLA Navy would have enough resources and military capability to avoid a successful United States naval blockade. These events could have a high likelihood of ensuring the election of an isolationist U.S. government that would mandate bringing U.S. forces home to defend the homeland. As a result, China would have the freedom to reunite with Taiwan without fear of United States military intervention.

One could dismiss this scenario as something out of a Tom Clancy novel, but the reality is at the core of the PRC's number one military strategy since 1949: active defense.⁷ Active defense is a concept for conducting strategic defense in conjunction with offensive operations at the operational and tactical levels to ensure the security of strategic objectives. Militarily threatening the United States homeland from the Caribbean to secure Taiwan and East Asia and avoid United States military intervention is a perfect example of active defense.

Deceive Heaven to Cross the Sea

To threaten the United States homeland from the Caribbean is a risky undertaking, and PRC leaders understand this. To be successful, the PRC will potentially turn to another Warring States Period strategy—Deceive Heaven to Cross the Sea.

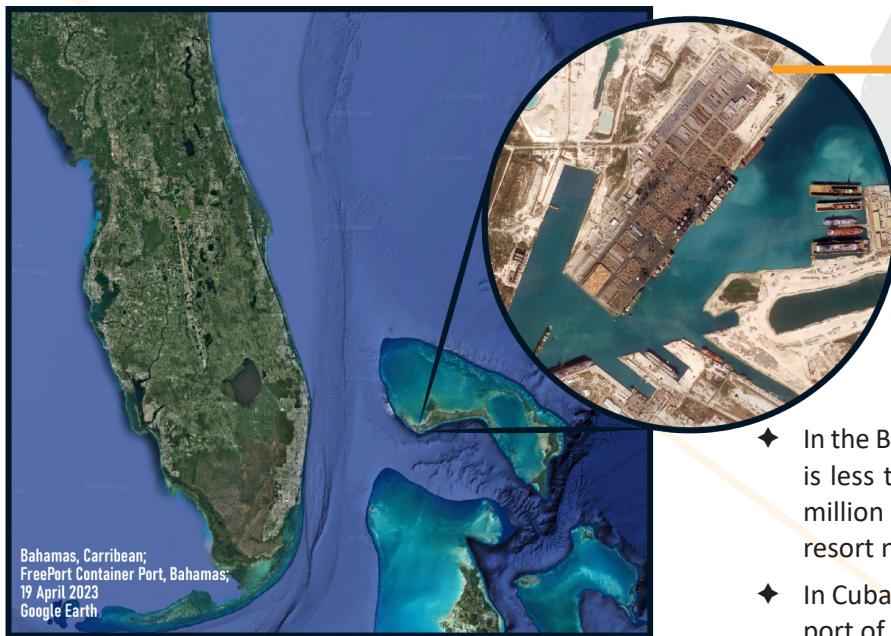
In the year 643, the Tang Emperor wanted to cancel a military operation because he was unhappy about crossing the sea. Determined to continue with the plan, the military leader, General Xue Rengui, invited the emperor to a banquet where he was entertained both day and night. Days later, the emperor realized the banquet was in a boat and was already halfway to modern day Korea.⁸ Realizing it was riskier to turn back, the emperor decided to continue.

As in the days of General Xue, today PRC leaders understand that they must use deception to achieve regional and global goals. "Hide capabilities and bide time," was the PRC's core strategy at the end of the cold war once they determined the United States was the biggest threat.⁹ Given that the world is waking up to the Chinese threat, PRC planners understand using deception today is more crucial than ever.

The Deception Exposed

Successful deception requires three main components: a subject as a diversion, a means to freely move around without drawing attention, and an authority figure to distract the audience.

Latin America is the Objective. To build military capability in Latin America and the Caribbean over time without attracting



suspicion is a tall order. The PLA must be able to sustain a prolonged military standoff against the United States in the Caribbean. The duration of such an operation would directly correlate to the time required to reclaim Taiwan. Furthermore, the PLA must have the military capability to conduct a legitimate military campaign against the United States homeland from the Caribbean to force the United States into a stalemate, leading to the irrefutable conclusion that the only logical way forward is de-escalation. For the PLA to conduct a sustained forward operation in the Caribbean for that duration requires well-armed forward military bases and established secure sea lines of communication (SLOC) all the way back to China. To set up such an elaborate military network undetected requires a perfectly executed deception plan.

The Perfect Deception Tool. China's Belt and Road Initiative (BRI) and State-Owned Enterprises (SOE) provide China the cover to freely move around Latin America and the Caribbean with limited United States scrutiny.¹⁰ Under the guise of the BRI, Chinese SOEs and businesses are laying the foundation for facilities and infrastructures that could easily be transformed into military forward bases and secure SLOCs.

By law, Chinese transportation enterprises are under obligation to function as strategic support forces for the PLA when needed. The same Chinese law mandates building all Chinese commercial ships and aircraft according to military specifications so they can transform into military assets when the need arises.¹¹ Therefore, every PRC-funded infrastructure venture must be viewed as a potential PLA military base.

PRC companies have funded numerous infrastructure projects that could easily transform into military facilities in Latin America and the Caribbean with varying degrees of success. Some of those projects include—

- ◆ In the Bahamas, a mega-port facility at Freeport, which is less than 100 miles off the coast of Florida; a \$40 million port off the Bahamian island of Abaco; and a resort next to the Prince George Wharf.¹²
- ◆ In Cuba, a \$120 million expansion project of the cargo port of Santiago in May 2019.¹³
- ◆ At Antigua and Barbuda, the modernization of the St. John's Deep-Water Harbor in December 2022.¹⁴
- ◆ In Panama, PRC SOEs are currently working on the Panama Colón Container Port and the Fuerte Amador Cruise Terminal, which are located at the Pacific and Atlantic entrances of the Panama Canal.¹⁵
- ◆ In Jamaica and El Salvador, PRC SOEs have attempted to secure port construction projects but so far have failed.¹⁶
- ◆ In Mexico, investments in various ports, airports, and transportation infrastructures.¹⁷

All these PRC-related projects have varying capacity to host PLA vessels and equipment, including submarines and aircraft carriers, and could easily transform into military bases in the future. If the current trend continues, conditions will be far more favorable for the PRC in 2035 when the PLA intends to complete its modernization effort.¹⁸

The establishment of successful forward operating bases will require multiple secure SLOCs back to China. A quick map study of PRC investments reveals three possible SLOCs from China to the Caribbean:

- ◆ Africa SLOC: Start from China to the South China Sea to the Indian Ocean, around the African continent, across the Atlantic Ocean to South America then up to the Caribbean.
- ◆ Suez Canal SLOC: From China to the South China Sea to the Indian Ocean to the Gulf of Aden, through the Red Sea, the Suez Canal, Mediterranean Sea, across the Atlantic Ocean and to the Caribbean.
- ◆ Oceania SLOC: From China to the Philippines, Indonesia, Papua New Guinea, Solomon Islands, Vanuatu, Islands of Oceania, to South America then up to Central America and the Caribbean.

PRC SOEs and businesses are working to establish dual-use infrastructure, while avoiding suspicion from the United States, throughout the three SLOCs.¹⁹ The infrastructure under construction along each SLOC could become military bases within the next 14 years.

Authority Commands an Audience.

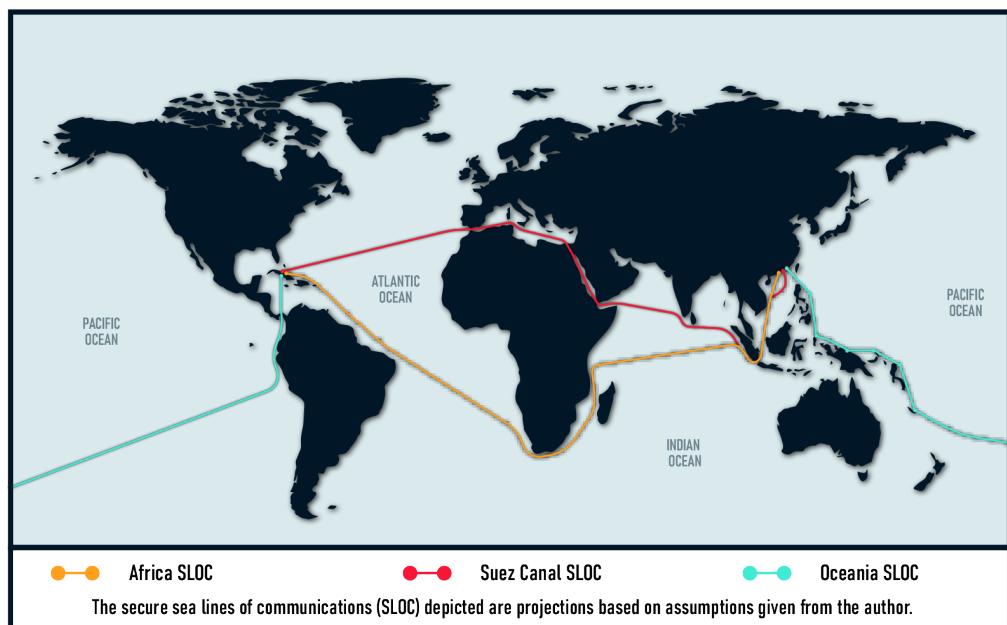
The BRI also provides the PRC with the perfect diversion to draw the United States attention away from PRC activities within Latin America and the Caribbean, the third component for any successful deception operation. A recent study from the William and Mary College shows that PRC BRI-like projects began decades before the official announcement

by President Xi in 2013 and continued with no observable changes afterward.²⁰ The author of the study concluded that “there may be some truth to the claim that the BRI is nothing more than a branding strategy.” It is highly likely the 2013 BRI announcement by President Xi was part of a disinformation campaign to manipulate United States analysts’ and policy makers’ attention away from PRC priority areas. The release of BRI land corridor and maritime routes as part of the announcement diverted attention toward Eastern Europe and Asia and away from Africa, Latin America, and the Caribbean.²¹

Taiwan as a Diversion. Another element the PRC is certainly attempting to exploit is the bipartisan determination within the United States to ensure Taiwan remain a free democratic island. PLA activities and comments from President Xi have led senior United States military leaders to believe a military invasion of Taiwan was approaching despite the PLA not yet having the capability.²² Aware of the effects of its activities on the minds of senior United States officials, the PLA will likely continue to incrementally heighten the level of activity around Taiwan in the next 5 to 10 years. This will prey on the anxieties of the United States and fix their attention on Taiwan while the PRC continues to use the BRI and its rebranded offspring, such as the Global Development Initiatives, to advance Chinese objectives in the Caribbean and along its three SLOCs.

Conclusion

The PRC plan to deceive heaven to cross the sea will be complete once conditions in the Caribbean and along the three SLOCs are set. The PRC will then execute its plan to besiege Wei to rescue Zhao. PRC planners are doubtlessly aware that 75 percent of global power transitions within the last 500 years resulted in wars, including World War I and World War II.²³ It would be negligent on the PRC’s part to not have



A representation of potential secure lines of communications from China to the Caribbean. (MIPB graphic)

a plan in place to mitigate risks against such an undesirable but highly probable outcome. Therefore, the plan laid out in this article is presumably the PRC’s decisive operation with other plans for aspects of its national power as supporting operations. This will not only ensure a peaceful reunification with Taiwan but will ensure the PRC a peaceful transition to the world’s dominant power, which, if China has its way, will occur no later than 2049. 

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Haitians alongside U.S. service members with Joint Task Force-Haiti and members of U.S. Agency for International Development unload humanitarian aid off a CH-47 Chinook in Jeremie, Haiti August 28, 2021. (U.S. Army photo)



A Model for Western Interventions in Small Wars

by Lieutenant Colonel John Georg

Introduction

Small wars, also referred to as limited conflicts, occur between forces of disparate capabilities; however, these encounters can span a wide range of human conflict. For example, humanitarian aid workers clashing with local criminal gangs in Haiti after the 2010 earthquake¹, and on the opposite end of the spectrum, in 1989, United States forces engaging the smaller military forces of Panama during Operation Just Cause². Most would agree that small wars exclude hostilities between nation states of comparatively equal capabilities, such as what occurred during both World Wars.

Colonel Callwell, a British military officer with 19th century colonial war experience, attempted to define small wars. He assessed that a small war is any military operation not involving regular forces of near similar capabilities.³ In his book, *Small Wars Their Principles and Practice*, he cited the late 19th century Sino-Japanese war as an example of the extreme edge of small wars. The Chinese imperial army was a large, but outdated, regular fighting force in comparison to the smaller, modern Japanese capabilities. At the time of the conflict, both China and Japan were modernizing their forces; however, Japan's rapid modernization efforts outpaced those of the Chinese imperial army. Though smaller in sheer numbers, Japan's abilities created an overwhelming capability mismatch that ultimately won the conflict for Japan. This capability mismatch is the factor that places the conflict into the small war category.⁴



In 2011, British and American servicemembers training Sierra Leonean soldiers to use a mortar as part of the United Kingdom's International Military Assistance Training and the U.S. Department of State's African Contingency Operations Training and Assistance program. (U.S. Army photo)

Modern Interventions

By this definition, modern western interventions in Africa are also small wars because the western forces face irregular forces or regular military forces of inferior capabilities. Since World War II, western military forces often fail to meet their strategic objectives despite having a large capability overmatch. This is especially evident when western forces engage in long-duration stability operations. Long-term stability operations over time degrade western force's legitimacy on the world stage, in the domestic political arena, and in the host nation. Legitimacy is the western intervention force's center of gravity. Therefore, they must protect it.

Western military forces can best achieve and maintain this legitimacy when supporting local governments and United Nations (U.N.) forces with short-duration, high-intensity operations followed by smaller footprint support missions. Western militaries should capitalize on capabilities unique to their forces, such as high-intensity combat operations, mobility, airpower, intelligence, and forced entry. Once the initial objectives are met, they can then transition to support capabilities, such as logistics, training, and intelligence, surveillance, and reconnaissance (ISR) that bolster host nation and U.N. forces conducting stability operations. During the support phase it is crucial for the larger and more capable western powers to de-couple from day-to-day combat operations, leaving those operations to the U.N. and the host nation. This is the model for success in future small war military interventions.

A Successful Western Military Intervention in Africa

The British military intervention in Sierra Leone accomplished its objectives by using western forces to conduct high-intensity,

intelligence-driven operations that transitioned to a support role focused on intelligence, logistics, and training support for stability operations led by the U.N. and host nation forces. This article will illustrate how this western military intervention can serve as a template for limited conflicts in Africa and other geographic command areas.

In 2000, the civil war in Sierra Leone turned in favor of the brutal Revolutionary United Front (RUF), supported by the dictator in neighboring Liberia. The host nation and U.N. forces on the ground were incapable of defeating the RUF. The British chose to intervene and rapidly deployed an operational reconnaissance and liaison team to answer tactical and operational level intelligence requirements in preparation for an intervention force.⁵ This included coordinating aerial reconnaissance missions

and deploying British special forces behind RUF lines in long-range reconnaissance missions. Additionally, British national intelligence significantly increased its collection and analysis of the area of interest. Through these efforts, the British identified that diamond and other mining operations were the main source of the rebel forces funding.⁶ This created an opportunity for national and international targeting operations to prepare the battlefield for military intervention and to suppress the RUF supply lines.

Shortly thereafter, the intervention force conducted a rapid entry operation, seizing a staging area to serve as a base of attack against the RUF. British forces were able to rapidly concentrate an overwhelming capability and launch Operation Palliser, which used a small but very capable task force to engage and defeat the RUF.⁷ The British exploited their mobility and intelligence advantages to rapidly seize key terrain throughout Sierra Leone while the U.N. and host nation forces deployed to liberated areas to conduct stability operations. The intent was for the British to defeat the RUF and for the U.N. and host nation forces to consolidate the gains.

Once the British forces defeated the main formations of the RUF, they rapidly transitioned to a support role for the U.N. and host nation forces. The focus for the British was on training and advising the host nation forces. Their combat units returned to secure areas that they could easily supply, and if necessary, from which they could again project combat power. The British established and supplied training sites that the host nation units rotated through prior to deploying to the liberated areas. This allowed the host nation forces to develop capacity and then obtain territory from U.N. forces to maintain. The U.N. forces could then move to other areas

in need of more robust stability operations. Additionally, the British forces established liaisons with U.N. units and headquarters, augmented the U.N. forces' staff, and provided intelligence and logistics support.⁸ This greatly aided the U.N.'s ability to operate in the country while reducing the British forces engaged in combat operations. It also created greater situational awareness for the British through U.N. and host nation reporting in combination with their own intelligence collection.

To further support the military operation, the British used other elements of national power against the enemy's center of gravity—the dictator in Liberia, Charles Taylor. National power refers to the tools a country uses to influence other countries and is a combination of a country's diplomacy, information and intelligence, and military and economic strength, also referred to as DIME.⁹ Diplomatically, the British isolated the Liberian dictator in the U.N. and within West Africa, resulting in little to no outside support. Informationally, the British used intelligence assets and arrangements to identify targets for economic sanctions. Economically, the British led a global effort to cut off diamond shipments by enforcing sanctions on blood diamonds.¹⁰ The unified effort to leverage DIME against this main center of gravity reduced the RUF's effectiveness and led to military and political victory. These national and international efforts effectively employed intelligence to drive their targeted operations.

The outcome was that the British intervention was a resounding success. First, it defeated the military threat. Second, it avoided a protracted conflict. Third, it returned Sierra Leone to a normal state, which is now growing economically with major foreign investment.¹¹ And finally, the British intervention was successful from an information operations perspective. The population of Sierra Leone is so appreciative of the British intervention that many citizens jest that former British Prime Minister Tony Blair could run for office any day and he would win.¹² The intervention had international, domestic, and host nation legitimacy that provided a unique western capability without the British getting mired in lengthy stability operations.

A Model for Success

The British intervention in Sierra Leone is a model for successful operations in small wars in Africa and other hotspots around the globe. Western powers harbor unique advantages in firepower, mobility, and maneuver. Their skill sets in logistics, staff work, and especially ISR capabilities amplify those advantages. The Sierra Leone model recognizes that western forces require significant degrees of international, domestic, and host nation legitimacy for successful operations. It capitalizes on the strengths of western militaries as well as those of allied, U.N., and host nation forces.

The British used a small but highly capable force to rapidly deploy into the area of operations and seize a staging area for further operations, enabling logistics and mobility. Next, they leveraged ISR capabilities to identify enemy forces and defeat them using superior maneuver and the lethality of western equipment. Last, using intelligence and maneuver assets, they identified and seized key terrain to establish a base for the stabilizing operations. The British followed this up with training, enabling U.N. and host nation forces to relieve the British forces and conduct the stability operations. The British forces could then downsize to an element merely meant to support the U.N. and the host nation.

This model maximizes the advantages of western forces while reducing the risks and weaknesses they face from long-term stability operations. It relies on host nation and U.N. forces that are less susceptible to the loss of legitimacy associated with long-term missions. Their contributions to multiple long-running U.N. peacekeeping missions attest to this strength. However, these same forces rarely excel at western style warfare, which aims to reduce civilian casualties, operates at relatively high speeds, and is empowered with logistical capacities capable of sustaining high-mobility forces and ISR to map and analyze enemy formations.

In less-developed nations, host nation forces are often nonexistent or not as capable, as was the case in Sierra Leone. They are nonetheless vital to a successful small war intervention. This highlights the need to rapidly develop the skill sets of such a force or identify a suitable equivalent force. Western forces will struggle, at great expense, to conduct multiyear operations as they rotate units on short-term deployments while viewed as an occupying force. On the other hand, a trained local force can conduct the day-to-day requirements of securing a territory and collecting intelligence on the ground. Therefore, combining western military force capabilities with those of the U.N., or some other multinational force, and the capabilities of a host nation force are critical to successful western interventions in limited conflicts. Each element brings different abilities to the fight and reduces the level of risk for the others.

Lessons for Military Intelligence Professionals

The British experience in Sierra Leone, highlights several lessons that many western militaries, the United States included, can learn. Western militaries have a great ability to find, fix, finish, exploit, and assess enemy concentrated forces, but they struggle with the invisible enemy encountered in protracted counterinsurgency fights. We need to maintain our ability to rapidly deploy military intelligence teams to develop the intelligence picture while the main force is still assembling. This requires language capabilities for coordination with U.N. and host nation forces and sharing of collected information and

66 Western militaries have a great ability to find, fix, finish, exploit, and assess enemy concentrated forces

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intelligence products with partner nations. We also need to plan for intelligence capabilities and other support assets to remain in country after the main force has withdrawn. These assets need to collect intelligence that can be disseminated to the partnered force, be it U.N. or host nation forces. This might require a shift in mindset for U.S. and other western intelligence professionals to rely on other information collection assets, like reconnaissance and security operations, instead of traditional intelligence operations.

Conclusion

Western forces are challenged by judgements from home, the host nation, and the world creating a formidable influence when engaging in limited conflict. Maintaining legitimacy of purpose for an intervention force during conflicts is a significant factor of mission success or failure. British actions in Sierra Leone provide an example of how western powers can integrate the U.N. and host nation forces for ultimate success. Western forces must develop a clear intelligence picture of the area of operations through a thorough intelligence preparation of the operational environment process. Executing a DIME strategy, ensures a full spectrum of effort that erodes threat support, bolsters intervention force support, and

provides for the swift transition to stability operations by U.N. and host nation forces. Targetable intelligence, rapid action, and well-executed transitions strengthen the legitimacy of intervention, stability, and host nation forces.



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U.S. Army photo by Staff Sgt. Felicia Jagdatt

A Data Storage Issue:

The Clash Between

Electromagnetic Warfare

and

Signals Intelligence

by Major David Schott

This article reflects the views of the author. However, the article does not reflect the official position of the U.S. Army Intelligence Center of Excellence or the U.S. Army Cyber Center of Excellence. What the author characterizes as a policy shortfall and cumbersome oversight is in fact critical to ensure compliant electromagnetic warfare and signals intelligence operations. Additionally, what the author characterizes as data loss, only occurs from an electromagnetic warfare perspective. Within signals intelligence operations, the data is properly databased and maintained through the proper procedures and technical authority.

Introduction

The Army recently added an electromagnetic warfare (EW) platoon to their tactical military intelligence companies. The addition of the EW Soldiers adds unique opportunities to detect and disrupt threats leveraging the electromagnetic spectrum; however, electromagnetic spectrum tradecraft is traditionally the responsibility of signals intelligence (SIGINT). As these two tribes begin to coalesce, a systemic collection issue will materialize: specifically, the issue of data loss and data storage. The data loss occurs when EW Soldiers purge the signals data either intentionally or unintentionally after operations. This article aims to illuminate the structure and policy shortcomings that contribute to these data loss and data storage issues. Additionally, it provides a set of practical recommendations to mitigate the effects while proposing an optimal solution for consideration.

Background

In 2018, the Army began modernizing its intelligence warfighting function by implementing a plan to add an EW platoon to tactical intelligence formations.¹ The modernization effort was necessary for tactical commanders to harness the organic forces to plan, coordinate, and respond to threats in the multidomain environment. Despite the much desired force structure overhaul, the anticipated advancements in understanding and visualizing the electromagnetic spectrum on the battlefield during operations have scarcely been achieved. A factor contributing to the delay is that EW is not an *intelligence activity*. Instead, it is a *warfighting activity*, and as such, the procedures for handling the collected information are governed by different authorities under U.S. law than the Title 50 intelligence authorities. The Title 10 general warfighting authorities are much less sensitive and do not require special handling.² To better understand the differences between EW and SIGINT a brief explanation is necessary.

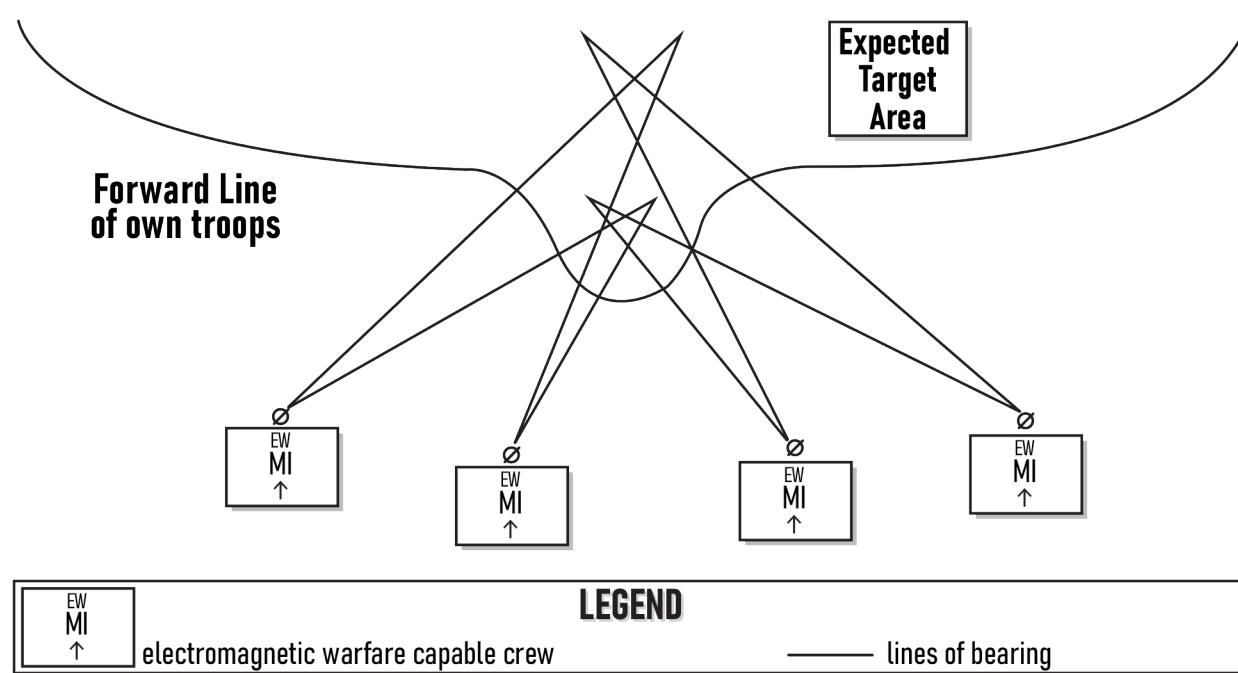
EW and SIGINT differ based upon the information's intended use, timeliness of the analytical effort, detail of the information provided, and the type of equipment used. EW is vital on today's battlefield because it uniquely provides tactical units with a tool to deny, degrade, destroy, or locate threat emitters. The classic EW operation focuses on finding and jamming enemy communications to enable friendly force operations. As such, the military defines EW as "military action involving the use of electromagnetic and directed energy to control the electromagnetic spectrum or to attack the enemy."³ EW activities are separated into three divisions that support each other. They are: electromagnetic attack, electromagnetic protection, and electromagnetic support (ES).⁴

For the scope of this article, we will focus on ES because this division most closely resembles SIGINT activities.

Joint doctrine states that ES involves actions "tasked by, or under direct control of, an operational commander to search for, intercept, identify, and locate or localize sources of intentional or unintentional EM [electromagnetic] radiation for the purpose of immediate threat recognition, threat avoidance, homing, targeting, planning, and conduct of future operations."⁵ The important factor is that ES actions support an operational commander for a varying time ranging from immediate to future operational planning. The issue with this description is the unclear language of the time of support. If ES actions may be used at the time of collection and for future operations, then how are these activities different from SIGINT?

SIGINT is a reliable intelligence source known for its formal relationships with intelligence partners and its contributions to the intelligence process. Throughout the years, SIGINT has modernized to meet the communications technical advancements. Joint doctrine describes SIGINT as "intelligence produced by exploiting foreign communications systems and noncommunications emitters."⁶ Much like EW, SIGINT is divided into three subcategories: communications intelligence (COMINT), foreign instrumentation signals intelligence, and electronic intelligence.⁷ COMINT is the subcategory relevant to the data loss issue, and, therefore, a brief explanation is necessary.

COMINT activities are "intelligence and technical information derived from collecting and processing intercepted foreign communications passed by radio, wire, or other electromagnetic means."⁸ In contrast to ES, the Director, National



The Terrestrial Layer System is the Army's next generation tactical vehicle based system integrating signals intelligence, electromagnetic warfare, and cyberspace operations. The system is currently in development. (U.S. Army photo)



Security Agency/Chief, Central Security Service, or an operational commander delegated SIGINT operational tasking authority, tasks SIGINT assets.¹⁰ Processing of COMINT, as a single-source intelligence activity, occurs within its technical control channels and is then released to the intelligence community and tactical customer.¹¹ Latency becomes the chief challenge associated with this procedure because the technical control measures restrict the direct dissemination of SIGINT to the tactical customer. However, this cumbersome oversight process may contribute to the reliability, authenticity, and accuracy of the SIGINT reports. After release of a report, the data and intelligence are stored because SIGINT has the authority, equipment, and formal architecture to do so.

EW and SIGINT exist for separate purposes yet often support the same efforts. Their methods and procedures for collecting, processing, and reporting are different, but the signals data collected is similar. Data retention and storage is the issue because SIGINT systems are authorized to store COMINT data while EW platforms are limited and only encouraged to do so. According to Army doctrine, EW sensors monitor enemy communications to generate situational awareness and “some information gathered. . . may simultaneously feed into intelligence channels.”¹² ES data that does not transfer into intelligence channels because of unit-level procedures for the transfer of ES data remains unprocessed by intelligence. This policy shortfall is the constraint on units to transferring “*select data* from electromagnetic support activities,”¹³ which unintentionally contributes to data loss. In practice, EW Soldiers purge all data from their equipment following operations losing access to the transferred and

non-transferred information. EW limitations continue considering they may only share combat-related information such as location, direction, frequency, and signal type. Although EW combat-related information has its purposes at the point of collection, that information may also have additional benefits to a SIGINT analyst. This leads to the question; how does the Army change to ensure the storage of all signal-related data for immediate and future processing?

Solutions

Three opportunities exist to regroup the Army’s EW and SIGINT assets to efficiently store collected signals data. These solutions each come with different advantages and disadvantages and various lengths of time to integrate. They are:

- ◆ Create combined EW/SIGINT teams.
- ◆ Develop new authorities/procedures.
- ◆ Remove the ES function from EW.

Integrating the two tribes allows the teams to leverage both EW and SIGINT capabilities. Combining EW and SIGINT elements to create combined teams is the optimal solution because of the ability to rapidly implement the integration with limited restrictions. The benefit of this model is that there are no major organization or culture shifts while still maintaining the existing training and developmental pathways for each discipline. The detriments include a tactical limitation and a role identity problem. Tactically, the size of an EW/SIGINT team may be too bulky for its operational requirements, while joining the two elements may create a role primacy challenge.

The next recommendation is to develop new policy and procedures to grant EW Soldiers the same authorities as SIGINT Soldiers. This would allow the inclusion of EW signal data into the same data repositories as its SIGINT relative. The positives with this option are that it increases the amount of signals collection assets while enabling storage of the desired data. The negative of this option is the amount of time required to institute a policy change and train Soldiers to be compliant with the policies and procedures.

Removing ES from EW is a final option. It would solve the problem by giving exclusive authority to SIGINT for signal collection actions. This recommendation causes the most disruption but does solve the problem. This recommendation's strengths are that it gives one entity the sole responsibility for managing the signals environment while avoiding costly redundant equipment. Its weaknesses lie in the requirement for SIGINT to support the other divisions of EW. Consequently, the electromagnetic attack response times may suffer because of SIGINT mission prioritization and synchronization challenges.

Conclusion

The Army collects but does not retain and store all ES signals environment data because of organizational and policy issues. EW and SIGINT are complex; each has a unique yet similar role. Data retention and data storage has emerged as a dysfunctional problem connecting the two complementary capabilities. The proposed solutions provide options for addressing the issue. The optimal solution is to create combined EW/SIGINT teams because of the ability to promptly implement the teams and the limited intrusion on existing training standards. As intelligence and EW professionals continue to advance the tactical EW/SIGINT model, collaboration is necessary to reveal the best approach to integrate these capabilities and maximize electromagnetic signature and intelligence collection. If no action is taken, commanders must accept that pieces of the larger puzzle may be lost because of administrative constraints.



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COGNITIVE WARFARE: CHINA'S EFFORT TO ENSURE INFORMATION ADVANTAGE

by Chief Warrant Officer 4 Charles Davis

Thoughts and assessments expressed in this work are those of the author. Discussion of any particular country is only intended to provide general knowledge and facilitate thought. It does not necessarily reflect an official assessment of or U.S. position on that country.

Introduction

Cognitive warfare is not a new concept; the United States and its allies use the term loosely to discuss information and cyberspace operations. However, China's views on the significance of cognitive warfare to future operations, as well as recent publications by the People's Liberation Army (PLA) regarding its application, provide perspective on China's expectations for success.

Taiwanese researchers Tzu-Chieh Hung of the Institute for National Defense and Security Research and Tzu-Wei Hung of the Institute of European and American Studies describe cognitive warfare as activities undertaken to manipulate environmental stimuli to control the mental states and behaviors of enemies as well as followers in both hot and cold wars.¹ They further contend that there is one key and distinct difference between cognitive warfare and cyberspace or information warfare—while each may produce effects on human cognition, only cognitive warfare weaponizes neuroscience and targets brain control. Figure 1, on the next page, is an illustration of this conceptual relationship between cognitive warfare and other types of warfare.

Weaponizing Brain Science

The idea of brain control may conjure images of Star Trek's Mr. Spock performing his telepathic "mind meld" to gain information; however, it is a growing concern for the Department of Defense. As early as 2008, the National Research Council of the National Academies of Science reported that brain sciences showed potential for military and warfare applications.² A 2017 Joint Chiefs of Staff white paper includes the following observation from Georgetown University's Dr. James Giordano: "Brain sciences can also be employed to mitigate or prevent aggression, violence, and warfare by supplementing HUMINT [human intelligence], SIGINT [signals intelligence], and COMINT [communications intelligence] (in an approach termed "neuro-cognitive intel": NEURINT)."³ Some of the world's largest corporations, use the term "brain hacking" to refer to their ability to compel a user of digital media to

In the "post-truth era," people are guided more by emotions than truth.

—People's Liberation Army Daily, July 7, 2022

return over and over again. Hacking a mental state is easier when the information or disinformation appeals to existing fears and anxieties.⁴

In Giordano's chapter of the Joint Chiefs of Staff white paper, he suggests brain science can be both a soft and hard weapon.

As a "soft" weapon, brain science can be used to foster power, which can be variously leveraged: from economic fortitude through exertion of effects upon global markets to impact nation states and peoples, to providing information and tools to more capably affect human psychology in engagements of and between agents and actors. Brain science can also be (dually or directly) developed and utilized as "hard" (e.g., chemical, biological and/or technological) weapons. These include pharmacological and microbiological agents, organic toxins, and devices capable of altering functions of the nervous system to affect thought, emotion, and behaviors.⁵

Reporting from academia suggests Russia, Iran, and North Korea have all been researching similar applications as far back as 2010, with little to no restriction on development. Current data suggests, of all our adversaries, China may be leading the way in theory and practice.⁶

The Jamestown Foundation reports that PLA theorist Zeng Huafeng defines cognitive space as "the area in which feelings, perception, understanding, beliefs, and values exist, and is the field of decision-making through reasoning."⁷ He further identifies four tactics to win the cognitive fight:

1. "perception manipulation" through propaganda narratives.
2. "cutting off historical memory" so that targets will be open to new values.
3. "changing the paradigm of thinking" by targeting elites to change their ideology.
4. "deconstructing symbols" to challenge national identity.⁸

In March 2022, Colonel Li Minghai of the PLA National

Defense University (NDU), National Security College War and Crisis Response Training Center authored an article discussing cognitive warfare as it applies to the conflict in Ukraine. Li describes Russia's use of neuroscience, new information technologies (such as big data and artificial intelligence), mass communication channels, as well as platforms to execute cyberspace, psychological, public opinion, legal, and other forms of information warfare. Li's article highlights the level of interest these activities are generating within the PLA. He is particularly interested in Russia's effectiveness at influencing adversary thought processes and ideology through propaganda dissemination, population indoctrination, and adversary culture and value system infiltration.⁹

Cognitive warfare is also gaining senior level attention within the Chinese Communist Party. There discussions center around the use of artificial intelligence to secure an information advantage. "Qi Jianguo, former Deputy Chief of Staff of the PLA, has stated that those who gain the upper hand in developing new-generation artificial intelligence technologies will be able to control the lifeline of national security: human cognition."¹⁰ Influencing human cognition and the will of the opponent will create a strategically favorable environment or subdue the opponent without a fight.¹¹

Members of the Chinese Academy of Military Sciences share Jianguo's belief that it is possible to influence an adversary's will. Chen Dongheng, a researcher at the academy, wrote cognition is based on "perceptions, identification, analysis, judgment, decision-making, and the selection of objective things, . . . the facts fully show that data can be manipulated, information can be mixed with water, 'truth' can be shaped, and human hearts can be influenced."¹² The idea of breaking an adversary's will without fighting is nested in the teachings of Sun Tzu, reinforcing the conviction in committing resources towards this end state.

Competition of Truths

In July 2022, the Center for Naval Analyses provided assessments of two pieces published by the *PLA Daily*, a Chinese military publication. The PLA believes the effectiveness of cognitive warfare relies on telling partial truths, which create a misleading picture, allowing the targets to draw inaccurate or inconsistent conclusions. This will drive conflict over what American media frames as personal truths. The PLA sees three strategies for winning the "competition of truths." They include:

- ◆ **Focus on positive outcomes:** Because the human brain pays attention to results and ignores background information, messaging should focus on a positive result rather than the difficulties or errors made in the process of getting to that result.¹³
- ◆ **Focus on numbers:** The human brain finds it easier to accept facts based on numbers. Using numbers and statistics, regardless of the accuracy or context, supports the narrative.¹⁴
- ◆ **Focus on the characterization of the issue:** Justify actions by characterizing them in a positive light that hides their true nature. Ends justify means.¹⁵

Other contributors to the *PLA Daily* suggest that the best way to view success in the domains is to apply the physical domain to the destruction of the enemy forces, use the information domain to secure advantage, and employ the cognitive domain as the means for achieving all out victory.¹⁶

The PLA approach to cognitive warfare tends to follow several key concepts:

- ◆ Effects of cognitive warfare are directed at and measured by human emotion.
- ◆ Success requires a variety of levels and types of professional experience applied against a common goal.

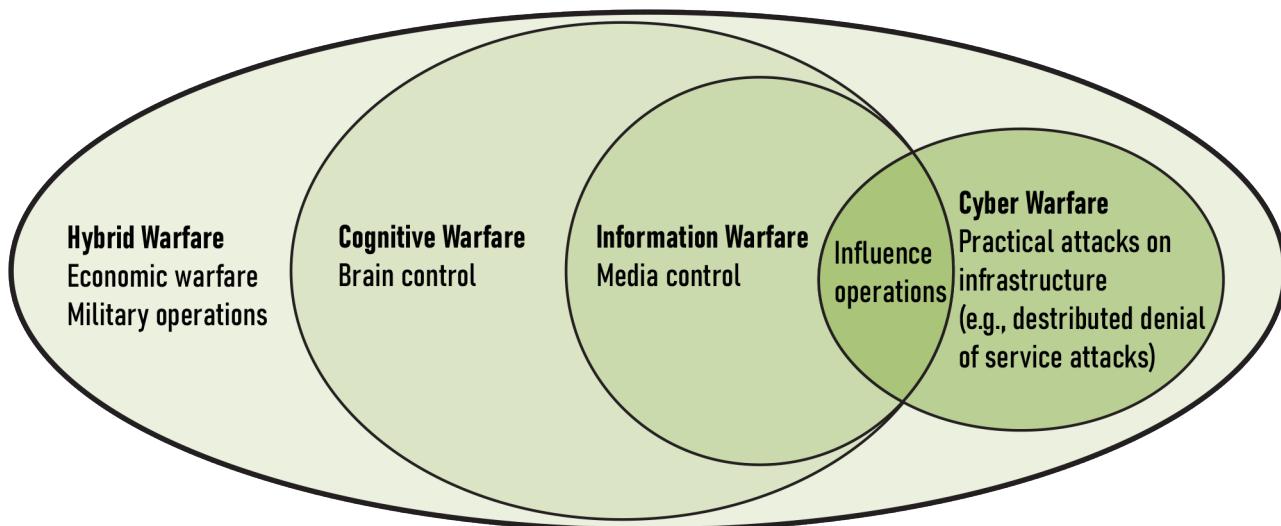


Figure 1. Cognitive Warfare Conceptual Relationships¹⁷

- ◆ Media and psychology professionals along with intelligence and cyber experts will collaborate with educators, researchers, and big business.
- ◆ Value is placed on decentralized lines of effort on a unified message or objective.

Other foundational concepts for the PLA include shaping the situation through unified messaging along with deterring the adversary and controlling the tempo and scale of warfare. Leaders must seize the initiative in defining the narrative, shaping legal issues to their advantage, and securing the moral high ground before conflict starts. Cognitive warfare should complement and support conventional strikes against command and control, reconnaissance, and early warning systems. The PLA anticipates this unified effort and focus will hasten political disintegrations and reduce military and civil will, defeating an adversary without a fight.¹⁸

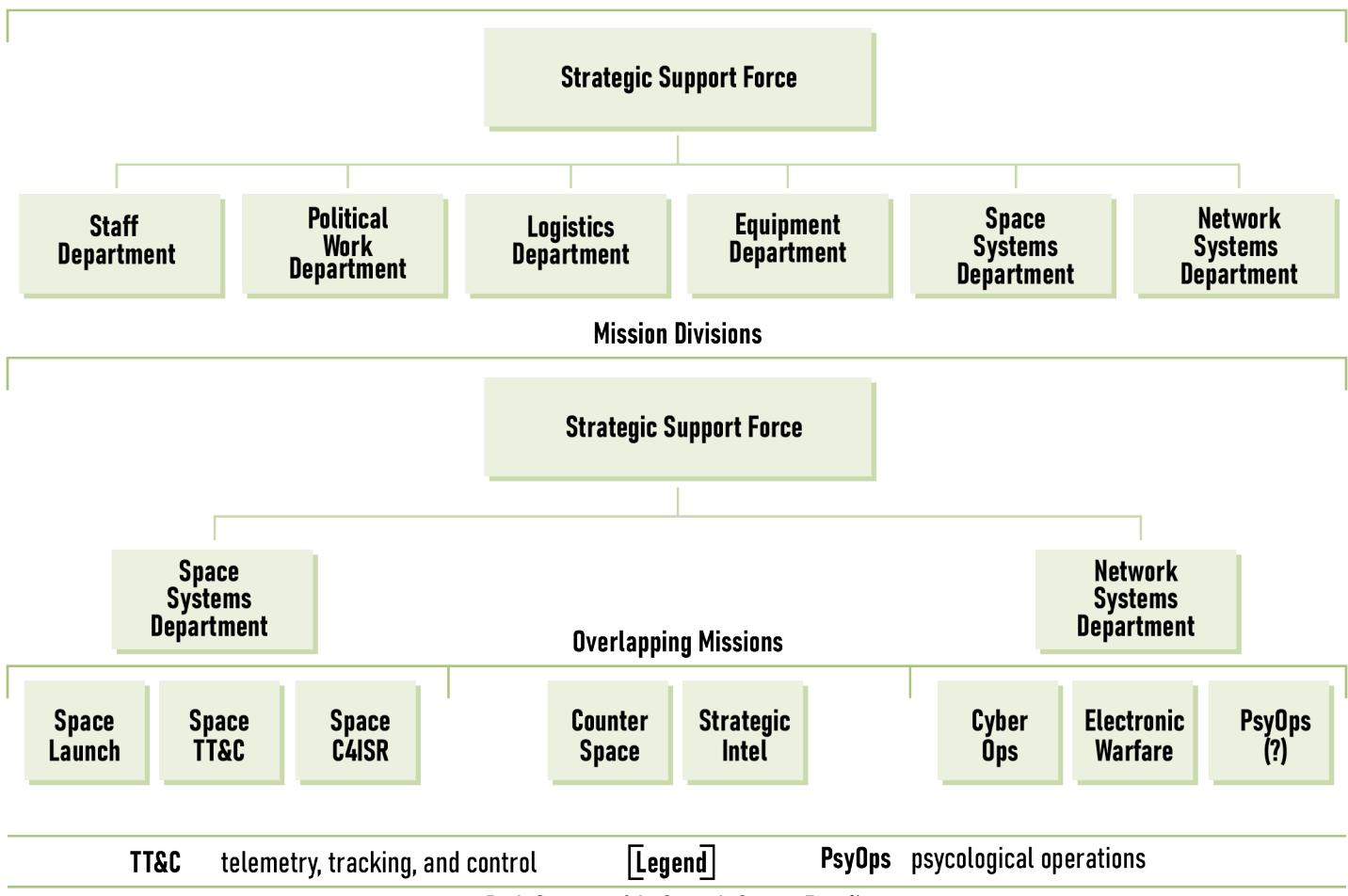
Strategic Support Forces

Given the Chinese Communist Party's commitment to applying cognitive warfare in conjunction with artificial intelligence development at a strategic level, it is not surprising that the PLA has experienced significant restructuring as it establishes a higher headquarters and operational organizations

to support the transition. A Brookings Institute report on the PLA Strategic Support Forces (SSF) indicates "of the 12 major military applications of artificial intelligence that China is developing, at least five are integral to the SSF's mission: intelligent satellites; intelligence, surveillance, and reconnaissance (ISR) software; automated cyberspace attack software; cognitive electronic software; and possibly autonomous vehicles."¹⁹

Created in 2015, the PLA SSF's structure offers some insight into the scale of investment China is making at the national level because they are integrating multiple organizations and strategic functions under one command. The SSF is comprised of two divisions that encompass the Space Systems Department, home to all space-related missions, and the Network Systems Department, which houses the PLA's information warfare activities. The 311 Base is a prime example of this restructuring. It previously belonged to the General Political Department and focused directly on political and psychological warfare. A special report from the NDU asserts, "Integrating the 311 Base's operational forces with the SSF's space, cyber, and electronic missions empowers psychological operations forces with cross-domain intelligence and helps maximize the impact of information operations on an adversary's psychology."²⁰

Basic Structure



The NDU report also discusses the broader level of influence and operational control of the SSF compared to U.S. Cyber Command. “The SSF’s Network Systems Department...is responsible for a much broader range of operations, including kinetic, cyberspace, space, electromagnetic, and psychological operation.”²² “The SSF’s structure is first and foremost intended to create synergies between disparate information warfare capabilities to execute specific types of strategic missions that Chinese leaders believe will be decisive in future warfare.”²³ This unity of command, planning, and force development provides significant inroads in coordinating complex cognitive warfare campaigns. Command and control is critical when considering that, in addition to its strategic information support role, the SSF is the primary force for information warfare within the Chinese military. They have responsibility for achieving information dominance across the competition continuum, from competition to crisis to armed conflict. “Under its pre-reform organizational structure, the PLA would have been required to transition to a wartime posture just prior to the outbreak of war (or immediately following it, if China were taken by surprise).”²⁴

The Question of Taiwan

Taiwan provides the most insightful example for evaluating China’s cognitive warfare operations. In 2017, the Global Taiwan Institute reported on the role of Base 311 (also called 311 Base) operations directed against Taiwan. The work points towards employment of three types of warfare (public opinion, legal, and psychological) and uses China’s Huayi Broadcasting Corporation (CHBC) to explain. CHBC focuses on content related to Taiwan, including the Voice of the Taiwan Strait. CHBC identifies as seeking to “promote Chinese culture” and emphasizes that “cohering compatriots’ feelings” is the company’s abiding purpose. Assessments of reporting suggest coverage of Taiwan is routinely negative, often highlighting political contention and social issues.²⁵

The messaging campaign, “Independence means war for Taiwan,” is another example of China’s cognitive warfare. This consistent and unified campaign has influenced public perception over the last 5 years. According to polls conducted by the Taiwan National Security Survey, in 2017, only 41.3 percent (23 percent agree, 18.3 percent definitely agree) of Taiwanese respondents believed that China would attack if Taiwan declared independence. However, at the end of 2020, as many as 61.8 percent (28.6 percent agree, 33.2 percent definitely agree) of people believed that China would attack if Taiwan declared independence.²⁶

Editorial and opinion pieces from Chinese-controlled media, such as the *Global Times*, reinforce this message in English as well. Clearly, this is directed at U.S. public opinion and is intended to stir divisiveness in U.S. politics. A July 2022 piece by Yu Ning went as far as to claim the United States was using cognitive warfare:

*The US has defined China as a strategic competitor and the Taiwan question is only a card used by the US to suppress China. The biggest thorn in the US’ side is the great rejuvenation of the Chinese nation and China’s rise, which may make the country replace the US as the leading global power. Therefore, launching a cognitive warfare campaign to hollow out the one-China policy is one of the US strategies.*²⁷

Content farms on the internet complement this type of disinformation, reinforcing and unifying the message across domains. From 2017 to 2018 Huawei targeted the Taiwanese public with many misleading messages. They disseminated fake news on social media websites that was subsequently commented on and forwarded by large numbers of Kuomintang party supporters in Taiwan. The China-friendly information space affects Taiwan’s readers without their awareness. Google’s search engine optimization in traditional Chinese is also managed. Search results send readers to posts and sites that reinforce the China-friendly messaging.²⁸ By delivering information with the greatest breadth and depth possible, it increases the chance of creating the sensory effect either consciously or unconsciously. This could affect audiences’ cognitive space in the long term. Similar techniques are common in commercial advertising, especially through digital mediums.

Conclusion

China is continuously testing and enhancing cognitive warfare across all domains. The PLA has developed strategic oversight and implemented tactics and techniques that allow measurement of success. It plans to continue to evaluate adversary capabilities, strengths, and weaknesses and will seize opportunities to exploit vulnerabilities. This is apparent from an August 2022 comment in *PLA Daily*: “By integrating national resources, strengthening strategic communication, using cognitive momentum to amplify the effects of political disintegration, economic sanctions, diplomatic offensives, and cooperation with the target object by multi-dimensional pressure of military action, we strive to defeat the enemy without fighting.”²⁹ 

Epigraph

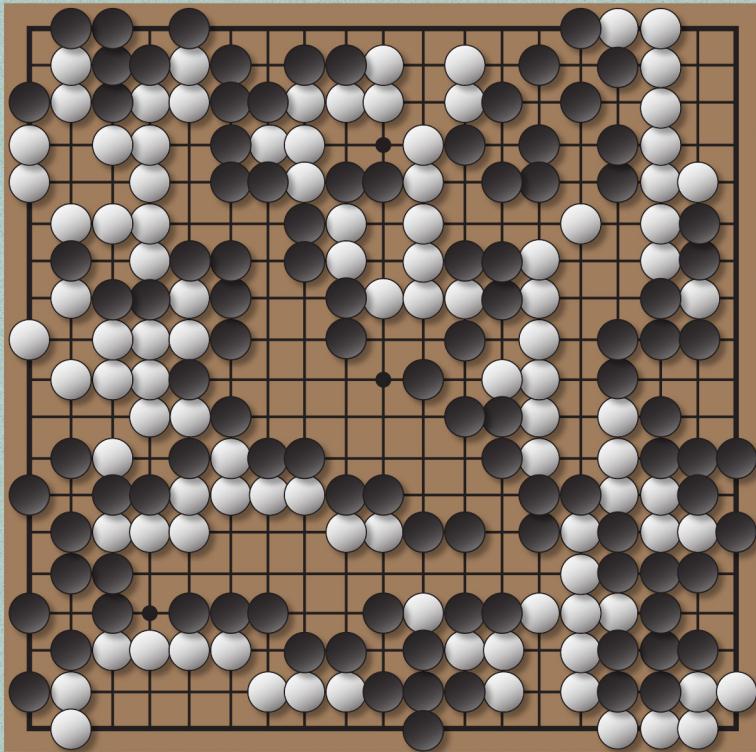
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Toward a Better Understanding of China: *Wei Qi* and Its Reflections in Core Leaders' Foreign Policy

by Captain Ross Nikides

This game [wei qi] bears a striking resemblance to the Chinese way of war and diplomacy. Its concepts and tactics are living reflections of Chinese philosophy, strategic thinking, stratagems, and tactical interactions. This game, in turn, influences the way Chinese think and act.

—Dr. David Lai, Professor of Strategy, U.S. Air War College

Setting the Board

Intellectual games created by societies often have a way of transcending the boards on which we play them. On an abstract level, the games represent more than just a past time, they represent a way of thinking emulated by their cultural creators. Such is the case with the strategic game of *wei qi*, a Chinese board game played by two opponents, each seeking to gain a relative advantage over their challenger by possessing a larger number of ‘territories’ at the end of the game. As David Lai suggests in the opening quote, *wei qi* emulates how the Chinese view the world and execute their foreign policy. This article examines the principles inherent in *wei qi* and how Chinese leaders Mao Zedong, Deng Xiaoping, and Xi Jinping reflect those principles in the past and the present approaches to foreign policy. Although each executed their foreign policy differently, certain *wei qi* principles were always present, demonstrating the significance the game has on Chinese strategic thinking and their perspective on its foreign policy.

Before exploring how *wei qi* has influenced Chinese foreign policy over the last century, it is necessary to describe the game, its principles, and how it has shaped Chinese strategic thinking. In Chinese, *wei qi* translates to “a game of surrounding pieces.”¹ Players have 180 stones of equal value to build up positions across the board while working to limit and neutralize their opponent through encirclement.² Good players can simultaneously create multiple dilemmas for their opponent while capitalizing on initiative to gain positions of advantage or territories. According to Henry Kissinger, who catalogs the game in his book *On China*, players must assess “not only the pieces on the board but the reinforcements the adversary is in a position to play.”³ Altogether, this helps to teach a player “the art of strategic encirclement,” where the player who is able to encircle more of his opponents positions while building up his own position wins the game through an “often narrow margin” of positional relative advantage.⁴ In essence, the game is multidimensional, forcing players to simultaneously think in complex terms across multiple fronts.

Inherent in this multidimensional contest are other strategic principles that help the player achieve their relative advantage. Since there is a limit to the number of stones, players must be efficient in their moves, patient and deliberate in their planning, flexible in their execution, and able to envision not only their local engagements but also the consequences of their actions across the board. Ultimately, this complexity gives players a wider sense of strategic thinking, enabling them to pursue interests in full while “mitigating the strategic potential of his [their] opponent’s pieces” to win the game.⁵

A History of Strategy

Kissinger suggests these principles had considerable influence on Chinese thinking throughout its expansive history. To highlight this, he contrasts *wei qi* against Western notions of domination, annihilation, gallantry, and Clausewitzian notions of decisive victory, as seen in chess. Where *wei qi* teaches encirclement, chess preaches victory through decisive means.⁶ As a result, strategic thinking metastasizes in a different way for the Chinese than it does for Western cultures. In the execution of strategy, the Chinese rarely “risk the outcome of a conflict on a single all-or-nothing clash... multiyear maneuvers were closer to their style,” differing from western tradition that “prized on the decisive clash of forces.”⁷ Instead, the Chinese stress “subtlety, indirection, and the patient accumulation of relative advantage.”⁸ This causes them to approach foreign policy issues on a “case-by-case basis, each time calculating the costs and benefits” of their policies to achieve their interests.⁹ *Wei qi* has thus taught the Chinese that security can never be absolute, and the key to achieving security is found in the gains made through long-term maneuvers to achieve the best position possible relative to their opponents. Therefore, the Chinese are very realist thinkers, playing a long game to pursue their national goals while simultaneously maneuvering to counteract threats to those interests.

Moving from the abstract to reality, the principles of *wei qi* heavily influenced Mao Zedong’s foreign policy approach of avoiding strategic encirclement during the early stages of the Cold War. Following his struggle against the Chinese Nationalist Party in 1949, Mao Zedong found himself and the newly founded People’s Republic of China (PRC) amid the larger struggle between the Soviet Union and the United States. Mao’s approach to foreign policy focused on fostering the ideological struggle of communism and China’s nationalism through his support of a ‘world revolution’ while balancing more realist notions of security for his newly founded cause. As journalist Edgar Snow recalls, “China supported revolutionary movements but not by invading countries . . . whenever a liberation struggle existed China would publish statements and called demonstrations to support it.”¹⁰ But, Mao was aware of both the precarious domestic situation he found himself in during his efforts to consolidate his revolutionary movement’s power and the ongoing power struggle between the United States and Soviets. Here, *wei qi* notions of balance prevail in Mao’s thinking—he needed to ensure domestic support to his cause while responding to threats regionally. As Peter Grimes writes, “the CCP [Chinese Communist Party] has inextricably linked itself, society, and foreign policy by staking its domestic right to rule upon its foreign policy performance.”¹¹ Joseph Fewsmith furthers this sentiment, writing, “China’s foreign policy seems very tightly bound to

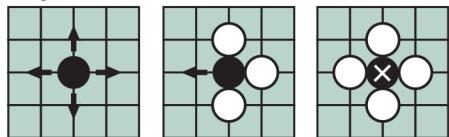
How to Play Wei Qi

Wei qi (Go, *Baduk*, *Igo*, or *Goe*) is an abstract strategy board game for two players. Here are some basics.

- The game starts on an empty board in which players take turns starting with Black.
- During your turn you can either pass or place a stone on an empty intersection, including the sides and corners.
- Stones do not move, but can be captured.
- The game ends when both players pass, and the player with the largest area (stones and territory) wins.

Liberties

Each stone has lines coming out of it, these are liberties. If all liberties are blocked by the opponent then the stone is captured.



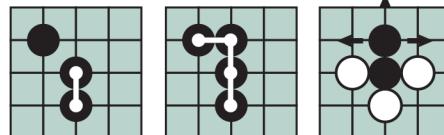
Graphic created by MIPB staff with information from <https://www.cs.cmu.edu/~wjh/go/rules/Chinese.html>

its domestic politics.”¹² In essence, Mao had to balance both acts to maintain the survival of the communist revolution and the PRC’s future.

In his foreign policy, it would be the play between these two superpowers, his assessment of regional security and necessity to maintain regime survival that demonstrated Mao’s *wei qi* thinking to avoid encirclement. As Kissinger writes, Mao “framed his foreign policy doctrines in terms of analogies with highly traditional Chinese games of intellect.”¹³ Mao was “determined to prevent encirclement by any power or combination of powers . . . that he perceived as securing too many *wei qi* stones surrounding China, by disrupting their calculations.”¹⁴ As discussed previously, *wei qi* is about presenting the adversary with multiple dilemmas across the board to aid in both countering their moves and preserving the players own finite resources. This helps explain China’s offensives during the Korean war to prevent the United States from maintaining the Korean Peninsula, its actions against India in the Sino-Indian war, and China’s opening of trade

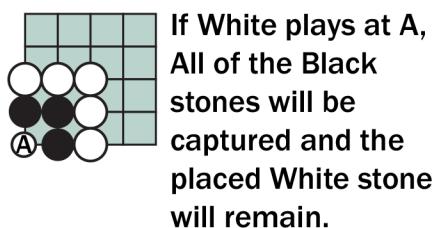
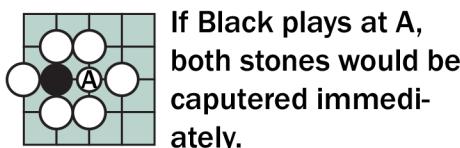
Groups

Stones of the same color connect and form groups when placed next to each other. Stones in groups share their liberties and cannot be captured if one stone in the group has a lifeline.



Self-Capture

A stone cannot be placed where it would be captured, unless it captures the opponent first.

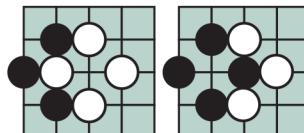


and diplomatic relations with the United States following the Sino-Soviet split to counter the buildup of Soviet forces on its borders. Mao focused on “long-range projections” of forces that had direct threat to China’s “periphery” or, in other words, used *wei qi* thinking to conceptualize his position and the threats to it.¹⁵ By using *wei qi* to guide his foreign policy, Mao avoided encirclement by playing each side to achieve relative gains and maintained his position of strength, both domestically and internationally. This helped Mao preserve the survival of the PRC and avoid encirclement by powers greater than his own.

After Mao, his successor Deng Xiaoping also demonstrated certain *wei qi* principles in his foreign policy approach. Unhappy with China’s position following Mao, Deng adopted a different foreign policy rooted in pragmatism and the long-term transformation of the Chinese economy. To build China’s economy, it was necessary to reestablish ties with the West and foster “reform and opening” domestically.¹⁶ While rapprochement started during Mao’s regime, Deng was able to

KO Rule

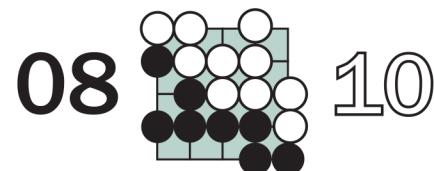
You cannot make a move that immediately repeats a board state.



When Black captures the White stone, White cannot immediately recapture the Black stone, as it would infinitely repeat. White in this case would have to play elsewhere.

Ending the Game

When both players cannot play a meaningful move and pass consecutively the game ends. Stones are then counted to determine a winner. White can also receive additional points for playing second (Komi) the amount depends on the rule-set.



further this transformation and eventually bring China back into the international order. Deng pivoted the trajectory of the Chinese economy toward growth by seeing it as a manageable process that he could lead to enable “peace and development.”¹⁷ Chas Freeman states, part of Deng’s grand strategy in rapprochement was to “cultivate friendships and trade with all nations regardless of their ideology” while minimizing “friction . . . to perceived slights and insults with restraint.”¹⁸ Examples of this approach include:

- ◆ Deng’s exercising restraint, maintaining policies on reunification, and continuing to integrate into the United States-led international order despite the United States continued sale of arms to Taiwan.¹⁹
- ◆ Deng’s move to realign Hong Kong economically while in 1984, he brokered a treaty with the British for control of the region that expanded China’s positional and economic strength.²⁰
- ◆ Deng’s Post-Tiananmen *Taoguang Yanghui* (to conceal one’s strengths and bide one’s time) dictum calling for China to carefully assess the situation, consolidate China’s positions, and calmly cope with challenges—all to advance Chinese interests despite the international backlash over China’s handling of the affair.²¹

Yet, fears of Soviet encirclement persisted into Deng’s regime requiring *wei qi* style moves to avoid encirclement and to support his rapprochement strategy. To “focus on economic development,” Deng believed the PRC needed to “mitigate and eliminate” the Soviet threat to achieve a semblance of security on its borders.²² This came in the form of conflict with a Moscow-aligned, post-war Vietnam in 1979; selling arms to the Mujahedeen through the United States to neutralize Soviet threats in Afghanistan; and continued engagement with the West to counter Soviet influence in the international system.²³

Collectively, Deng’s strategy to open the Chinese economy, reestablish diplomatic ties, and avoid Soviet encirclement reflects a more cautious game of *wei qi* in which he maintained flexibility, restraint, and a long-term vision of aligning China’s interests in new areas while bolstering China’s economic and diplomatic position. *Wei qi* is about “moving into empty spaces” to achieve a relative position of strength.²⁴ Deng achieved this by moving into the diplomatic and economic spaces to drive China’s economic reform. Deng’s reforms were further enabled by *wei qi* style moves to counter Soviet influence along the Chinese border. Thus, Deng’s foreign policy reflects a calculated *wei qi* player seeking to grow their own position while limiting that of others.

Currently on the Board

Under the current regime, *wei qi* reflects in Xi Jinping’s maneuvers to grow Chinese influence and position globally. The

leaders in between Deng and Xi more or less continued the foreign policy of “biding time,” choosing to focus on domestic reforms and the “peaceful evolution” of China.²⁵ Yet, by embracing a new sense of nationalism and undertaking internal moves to consolidate power, Xi has taken a more aggressive approach to foreign policy. Xi’s foreign policy reflects *wei qi* notions of relativity, seeking to mitigate the United States power and influence while continuing to rebuild China’s position of strength. Ultimately, Xi seeks to build China’s internal strength and expand its external influence. Xi intends to align China’s status in the international system with historic and Confucian notions of the Middle Kingdom, creating conditions where the system is more Sinocentric and favors Chinese interests.²⁶

One of the ways Xi has pursued this foreign policy is through the Belt and Road Initiative (BRI). According to Peter Gries, the BRI is an “international megaproject” reflecting Xi’s “promised China Dream of national rejuvenation.”²⁷ The BRI is an investment and infrastructure project expanding both China’s overland and maritime trade routes. This includes establishing a vast “network of railways, energy pipelines, highways” and ports, along with “expand[ing] the international use of Chinese currency.”²⁸ Apart from economic advantages, it provides the Chinese with “routes the U.S. military cannot disrupt” and the means for the Chinese to project forces to secure its interests.²⁹ Combined, it is easy to see how Xi’s BRI reflects *wei qi*—by moving into the empty spaces where the United States has not had significant influence (and some places that it has). Through the BRI, Xi is trying to simultaneously mitigate the United States strategic potential while bolstering China’s own. By limiting the United States economic and military influence, the BRI puts China into a more advantageous position relative to the United States. In sum, Xi’s strategic thinking regarding the BRI mirrors a *wei qi* player’s moves as they seek to win through relative advantage.

Closing Moves

As seen through the foreign policies of Mao Zedong, Deng Xiaoping, and Xi Jinping, the game *wei qi* yields considerable influence on Chinese strategic thinking and conceptualization of the international system. The game rests on several principles that foster stratagems to help a player avoid encirclement and achieve relative advantage compared to their opponent. Since Mao, the Chinese approach to foreign policy utilizes these principles and stratagems. It seeks to limit foreign threats and influence while it secures China’s own interests, domestically and abroad. Ultimately, understanding the influence of *wei qi* on Chinese thought provides a glimpse into the core leader decision making and supports future policy makers, intelligence professionals, and strategists conducting analysis of China.

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23. Kissinger, *On China*, 297. Kissinger indicates that Deng was deeply concerned with encirclement following the Vietnam War, especially because it was in China's interest to grow a Southeast Asian bloc. He writes, "the US, Soviets, Chinese, and Vietnamese were playing a quadripartite game of *wei qi*."

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