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MASTER OF MILITARY STUDIES

OPERATIONALIZING HYBRID WARFARE: HOW THE US CAN ADAPT TO GREAT
POWER COMPETITION

SUBMITTED IN PARTIAL FULFILLMENT
OF THE REQUIREMENTS FOR THE DEGREE OF
MASTER OF MILITARY STUDIES

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Executive Summary

Title: Operationalizing Hybrid Warfare for Great Power Competition

Author: Lieutenant Commander Samson Covert, United States Navy

Thesis: To effectively compete against China in the Indo-Pacific Region, the US must utilize hybrid warfare as a core mission area. Given the complexities of hybrid warfare, and the disparate nature of the US all-of-government landscape, the US should establish a Joint Interagency Task Force to synchronize the requisite capabilities and authorities.

Discussion: The US is currently in a period of significant transition. As the US shifts focus from the Global War on Terrorism to Great Power Competition, the US finds itself in its worst position relative to its rivals since the height of the Cold War. China and Russia are closing conventional capability gaps with us, while simultaneously US defense budgets have ballooned to unsustainable levels. To compete in an era of Great Power Competition, the US must reconsider its approach to warfare. The US has a bias towards technological solutions and high-end warfighting capabilities; however, this is not a viable model moving forward, and cedes the peacetime arena to our adversaries. Instead, the US must adopt similar tactics to China and Russia into its own arsenal. The phenomenon referred to as “hybrid warfare” has allowed US adversaries to achieve many of their strategic aims with significantly smaller investments in financial resources and manpower. This paper’s thesis proposes that the US adopt hybrid warfare as a warfighting mindset and operational model. As an initial starting point, this thesis suggests the establishment of a Joint Interagency Task Force to counter China in the Indo-Pacific Region.

Conclusion: While the US has certain cultural values that prevent it from mirroring the exact tactics of its great power competitors, the US can leverage hybrid warfare to its advantage. To effectively do so will require the establishment of a Joint Interagency Task Force capable of synchronizing US actions in time and space.

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Preface

The face of warfare is constantly changing. Underneath the surface, the same issues of strategy, the unpredictability of human nature, economics and sheer chance remain unchanged. After a hard-fought war against violent extremists, the face of warfare is once again changing for the US. It is increasingly apparent terrorism is but one of many significant challenges facing the US. As China reaches parity – both economically and militarily – with the US, our position in the world will radically change. When accounting for the continued threat posed by Russia, North Korea and Iran, the US’s situation at times seems bleak. However, the fate of the US as a declining power is far from a *fait accompli*. Our alliance system remains unrivaled, and despite partner concerns over recent “America First” rhetoric and demands for rebalancing defense burden sharing, the US remains the “beacon on the hill.” Given all these changes, this thesis is an attempt to reflect on how the US should adapt across the elements of national power to face the threat posed by hybrid warfare. While ultimately remaining a surface level treatment given the immense complexity of the problem, it is my hope that it serves as a starting point for further consideration.

I am immensely thankful for those who helped me throughout the process of writing this thesis. Most notably, I would like to thank Dr. Richard Hegmann for his frank, yet caring guidance. His experience and level of knowledge were humbling. Additionally, I would like to thank Lieutenant Colonel Jeremy Glauber, Dr. Andrew Scobell, and Dr. Yuval Weber for their mentorship and teaching, without which I would have been unable to tackle such a project.

Background & Introduction

The world is changing – rapidly. The advent of information systems and the proliferation of technology and globalization have drastically changed the global landscape and accelerated the rate of change. Simultaneously, the US finds itself in a transition period in its history. The "unipolar moment" is over, and the economic, financial, educational, and social foundations of US power are eroding. China is rapidly developing its economy and military while garnering the prestige that comes with its new status, all at the US's expense. Meanwhile, Russia, while still economically backward and relatively militarily weak compared to the US, is blending old tactics with new technologies to frustrate US foreign policy objectives and exert influence beyond what its means would normally dictate. Simultaneously, the US is attempting to convert its military to compete in an era of "Great Power Competition" (GPC). The closing capability gap between the US and China has understandably led to the US attempting to rebuild its conventional capabilities after decades of investments in capabilities designed to fight the Global War on Terror (GWOT). While conventional forces remain a potent deterrent and needed capability should deterrence fail, the US must also consider ways to counter adversary use of hybrid warfare during ostensible "peacetime" or periods of crisis or tensions that remain short of a full-scale conventional war. Doing so will require more than new technologies. A new means of conducting warfare is vital.

This thesis attempts to address how the US can effectively incorporate hybrid warfare into its arsenal. First, the thesis will weigh and refine various definitions of hybrid warfare and explore the origins of the concept. Second, the thesis will look at how Russia and China utilize hybrid warfare, viewing such an assessment as critical to informing how the United States might shape its own conduct of hybrid warfare. Third, this thesis addresses the current US discourse on

hybrid warfare and examines US norms and perspectives that make its practice more difficult than for Russia or China. Next, the paper will present a proposed operational model for the US to conduct hybrid warfare in the Indo-Pacific Region (IPR). While a similar model is applicable elsewhere, the most potent threat to US interests comes from China in the IPR, making it the most relevant starting point. Finally, this thesis will conclude with a vignette to demonstrate how the proposed model would work in practice.

Hybrid Warfare in the Department of Defense

Academics and policymakers use several terms interchangeably to describe activities that fall outside the realm of conventional warfare tactics. The most frequent are: hybrid warfare, irregular warfare, gray-zone operations, and political warfare. Each term has subtle contextual differences. For this thesis's purposes, settling on a standard term is appropriate to serve as a point of departure for further discussion. At the broadest level, this essay uses "hybrid warfare" to encompass the collective set of terms used to describe non-conventional conflicts. Following this thesis's examination of the theory and practice of hybrid warfare, particularly by Russia and China, it offers a more precise definition to provide additional clarity.

The Department of Defense (DoD) does not have a doctrinal definition of hybrid warfare; however, this has not prevented the DoD from recognizing and attempting to address the challenges posed by adversary use of hybrid warfare tactics. The DoD's ability to effectively incorporate hybrid warfare into its strategies is hampered by the lack of an agreed doctrinal definition of the concept. One of the contributions this thesis aims for is to distill contemporary academic and military thinking into a working definition that can better inform DoD's practice of the art.

The 2018 National Defense Strategy (NDS) clearly outlines the DoD's shift from prosecuting the GWOT to a primary focus on GPC. The NDS highlights China as the primary threat to US global interests and addresses Russia as a significant threat.¹ In 2020, the DoD released the Irregular Warfare Annex (IWA) to the NDS. The IWA asserts the type of operations conducted during the GWOT apply to GPC and refers to both as irregular warfare (IW). IW's doctrinal definition is "a violent struggle among state and non-state actors for legitimacy and influence over the relevant population(s)."² While this captures a portion of the broader set of challenges typically grouped under hybrid warfare, in this paper's view, it is insufficiently inclusive. While IW's doctrinal definition is lacking, the IWA explicitly states that IW is more than counter-terrorism operations and includes "indirect approaches" while encouraging the entire DoD to adopt a similar mindset during the conduct of its operations.³

Despite the preliminary attempt to characterize and respond to China and Russia's hybrid warfare tactics, the utilization of the term "irregular warfare" is insufficient. IW has a narrow and insufficient doctrinal definition that fails to adequately describe the nature of the current interactions between major powers.⁴ The current definition's conceptual roots likely reflect the US's experience conducting counter-insurgency (COIN) operations over the past two decades. Despite similarities, countering insurgencies and conducting or countering hybrid warfare operations are distinctly different undertakings. While the GWOT required emphasis on the negative – *preventing* insurgencies and terrorism, hybrid warfare requires the US to be competent at both the positive and negative. To successfully compete with its adversaries, the US must counter hybrid warfare *and* use hybrid warfare itself. The IWA at least tacitly acknowledges this reality by advocating that all US forces incorporate what it refers to as irregular warfare.⁵ As the US continues its rebalance towards GPC, it will be necessary to clarify

its doctrinal definitions to reflect the new operating environments. Whether the definition of irregular warfare evolves or a new term such as hybrid warfare is defined for the first time is immaterial so long as the incongruities characteristic of the current usage of irregular warfare is addressed.

Hybrid Warfare's Conceptual Origins

In the absence of a doctrinal definition of hybrid warfare, a look at the concepts' contemporary origins can provide valuable insight. In his 1954 book, *The Strategy of Indirect Approach*, British military historian and theorist Liddell Hart advocated for a type of warfare focusing on asymmetric and psychological operations as an efficient means of winning a conflict.⁶ As stated by Hart, "throughout the ages, effective results in war have rarely been attained unless the approach has had such indirectness as to ensure the opponent's unreadiness to meet it. The indirectness has usually been physical, and always psychological."⁷ Hart's observation provides clarity to the inherently opaque nature of hybrid warfare in that it highlights that specific tactics and technologies are ultimately not themselves a type of warfare; instead, the mindset and approach to warfare is what differentiates a hybrid or indirect approach from a conventional one. Hart was witness to the realities of WWII, the Chinese Civil War, and the Korean War. All three conflicts had conventional aspects, but observable changes in the conduct of war were emerging that Hart presciently identified. Hart's 'indirect approach' remains a foundation for today's thinking on the collective set of terms such as 'hybrid warfare' or 'gray zone operations.'

Scholars such as Dr. Frank Hoffman reignited the discussion on hybrid warfare in 2007, primarily in response to observations of the 2006 Israel-Hezbollah conflict where the conventionally weaker Lebanese Hezbollah utilized several non-conventional tactics to bring the

Israeli Defense Force to a standstill.⁸ Hoffman described Hezbollah's tactics as a 'multimodal' form of warfare, blending conventional forces with non-traditional elements such as information operations and decentralized forces.⁹ The purpose of these 'hybrid warfare' tactics was to neutralize the relative advantages of the conventionally superior Israel Defense Force (IDF) and eroded Israeli public support while mobilizing otherwise indifferent Lebanese Muslims against the IDF. Hoffman's description of hybrid warfare was noteworthy since it identified several vital tenets: asymmetric tactics to overcome an adversary's relative advantage, information operations to influence public support for a conflict, creative employment of conventional capabilities to maximize effect, and deniability.¹⁰ The aforementioned case study highlighted hybrid warfare's utility prior to and during a conflict. While most practitioners of hybrid warfare attempt to prevent the escalation of conflict and highlight the concept's utility for competing short of war, a full analysis of the concept should remain aware that hybrid warfare tactics also prove useful during full-scale hostilities. In many instances, the use of hybrid warfare tactics blurs the lines of where unconventional and conventional conflict occurs.

Current Conceptualizations of Hybrid Warfare

International Relations scholars have built on Hoffman's work, with a large amount of scholarship dedicated to the most prolific users of hybrid warfare since the Israel-Hezbollah War - Russia and China. Despite substantial interest in the topic, no conclusive definition of hybrid warfare has emerged in academia. This is partly due to the constantly changing nature of hybrid warfare tactics, which make it difficult to conceptualize and define. Additionally, there is debate on the utility of categorizing activity as hybrid warfare due to its lack of an easily definable limiting principle.¹¹ Since hybrid warfare tactics are inherently flexible and frequently evolving, boundaries between conventional and hybrid warfare are difficult to ascertain. Some scholars

argue that with no limiting principles, there can be no true definition of hybrid warfare.¹² The uncertainty of the limiting principles is in itself characteristic of hybrid warfare. Orderly categorization allows academics and military professionals to conceptualize the challenge before them; however, operating outside of those conceptualizations accounts for a significant portion of hybrid warfare's effectiveness against conventional adversaries.

Despite the lack of clear consensus on defining hybrid warfare, this paper identifies four important areas of agreement in the literature. First, the concept of asymmetric advantage is key. Some scholars view hybrid warfare as an act of necessity by conventionally weaker actors who would otherwise face an imminent defeat.¹³ To overcome conventional overmatch, actors attempt to identify their adversary's relative strength or critical vulnerability and degrade or destroy that capability using means that are less costly and difficult to counter. The resultant "asymmetry" creates a circumstance favorable to the actor despite the possession or expenditure of resources. Second, most hybrid warfare actors attempt to shape perceptions in their favor.¹⁴ The target may be the adversary directly or may take an indirect approach, such as influencing an adversary's population to degrade support for a war effort. Third, most hybrid warfare actors attempt to create some level of deniability to shield themselves from reprisals and control escalation.¹⁵ Actors accomplish this in various manners, such as proxy forces, covert operations, or exploitation of legal loopholes that make a conventional response costly or difficult to execute.¹⁶ Fourth, hybrid warfare focuses on making incremental gains, where individual actions do not trigger or allow a significant response from the adversary, but in composite allows the actor to achieve a desired end state. The variance in the execution of hybrid warfare necessitates the study of individual actors in specific circumstances to understand how they may behave in

the future. However, these four patterns appear to be generally universal to most instances where actors utilize hybrid warfare.

Russian Hybrid Warfare Theory

Russian Chief of the General Staff, General Valery Gerasimov's article titled *The Value of Science is in the Foresight*, published in 2013, remains a foundational text in hybrid warfare studies.¹⁷ Gerasimov emphasized that traditional warfare – large-scale combat operations – were becoming less relevant in modern warfare. Instead, he highlighted a trend towards the combination of military and non-military means to achieve strategic objectives where military force alone would be costly or insufficient. Some scholars were quick to interpret General Gerasimov's article as a statement of Russian doctrine; however, a closer examination shows he was identifying trends that the Russian defense establishment would face in future conflicts rather than prescribing a new set of doctrinal warfighting principles.¹⁸ Many of the trends identified by Gerasimov were related to US actions. Gerasimov's article was likely a representation of Russia's internal intellectual discussion on how to counter the US while suffering from budget shortfalls and conventional inferiority.

Russia's annexation of Crimea and occupation of eastern Ukraine in 2014 were accomplished primarily through hybrid warfare tactics. Given the proximity to General Gerasimov's publication, the two appeared connected. However, the tactics on display in Crimea and Ukraine were not a recent development. The Soviet Union actively used "political warfare" to subvert target populations.¹⁹ Russian security services traditionally focused on gaining influence by discrediting adversaries and building positive images of the Russian government and people. Russia historically referred to active propaganda efforts as "Active Measures."²⁰ Active Measures focused on identifying the natural cleavages that are inherent in any society.

These cleavages may exist between social classes, ethnicities, geographic regions, and political ideologies. Russia rarely attempted to create new cleavages and instead focused on exacerbating existing ones. While amplifying internal tensions, Russia simultaneously attempted to bolster its public standing or its proxies' standing.²¹ Russia readily used these tactics throughout the initial phases of the conflict in Ukraine.

A relative consensus has emerged on Russia's most common hybrid warfare tactics, yet a minority of scholars dispute that hybrid warfare is a distinct part of Russian doctrine. This difference results from disputed interpretations of General Gerasimov's writings, with some scholars claiming he intended to identify a global trend vice advocate for a new Russian doctrine.²² Since hybrid warfare tactics tend to evolve rapidly, it is difficult to discern what constitutes Russian doctrine conclusively; however, scholars have identified patterns that suggest at least some level of standardization of hybrid warfare tactics. Part of the classification of Russian actions as hybrid warfare may result from mirror-imaging on the part of US scholars. While the US tends to view warfare as a binary of war or peace, Russia tends to view war as a continuum of conflict. Regardless of semantic descriptions, it is clear that Russia approaches conflict in a unique manner, reflecting its cultural values and views of conflict.

Russian Hybrid Warfare Operations

Russia's recent hybrid warfare operations have utilized Active Measures and incorporated a relatively new element – the use of private military contractors (PMCs). There are thousands of active PMC's in Russia, but the most significant is the Wagner Group. After the fall of the Soviet Union in 1991, the security situation inside the newly formed Russian Federation was volatile. As a result, many former members of the security establishment – primarily the KGB – went into private enterprise as security contractors.²³ They utilized their training and contacts to protect the

emerging oligarch-class of crony capitalists. The use of security contractors remained an internal phenomenon until the emergence of the Slavonic Corps. A private security contractor based in St. Petersburg and registered in Hong Kong called the Moran Security Group established the Slavonic Corps to assist the Syrian government. Despite the appearance as a private company, this was most likely a front company to conceal the Russian government's involvement. The Slavonic Corps experienced significant growing pains in Syria, and the mercenaries left after several operational failures.²⁴ Despite initial setbacks, the Slavonic Corps has now evolved into the highly capable Wagner Group.

Despite being referred to as a PMC, the Wagner Group is functionally a branch of the Russian government. Numerous anecdotal reports suggest varying degrees of direct control by the Russian government depending on the sensitivity and criticality of the operation. The Wagner Group is owned by Russian oligarch Dmitry Progozhin, who is a close confidant of President Vladimir Putin.²⁵ This relationship is significant since PMCs are illegal under Russian law and require the state to overlook the activities taking place.²⁶ Additionally, the relationship between Putin and Progozhin suggests substantial levels of oversight by the Russian government. The patronage-based system of economic prosperity in Russia makes the wealthiest Russians, whom Progozhin is one of the most, beholden to Putin to maintain their status.²⁷ There is no company registered in Russia or elsewhere called the Wagner Group. Legally, the Wagner Group does not exist. The Wagner Group is also exceptionally well equipped for the variety of tasks it carries out. A large portion of its personnel are former Spetsnaz, the Russian equivalent of the Special Forces. Additionally, the Wagner Group shares bases and logistics with the Spetsnaz, suggesting a sophisticated level of integration.²⁸ Progozhin also owns the infamous Internet Research

Agency (IRA), commonly referred to as the “Russian troll farm,” which spearheaded Russia’s interference in the 2016 US Presidential Election.²⁹

The Wagner Group was a lead operational element in the annexation of Crimea and the occupation of Eastern Ukraine. Ukrainian intelligence officials credibly claimed to have intercepted communications directly between the Wagner Group and both the GRU and General Staff.³⁰ While there were indications of regular Russian forces operating inside Ukraine, the Wagner Group and IRA were also significant contributors to Russia’s efforts. Likewise, the Wagner Group has conducted operations in Syria, Libya, Central African Republic, Madagascar, Sudan, and Venezuela.³¹ Its efforts have included various combinations of regime stability operations, economic exploitation, political campaigns, and the establishment of alternative media outlets.

Three interrelated variables characterize the Wagner Group’s operations: Russia’s strategic interests, Russia’s economic interests, and the economic interests of Dmitry Prigozhin, and by extension, the economic interests of Vladimir Putin.³² If the Russian government would overtly send forces to conduct any of these operations, there would most likely be significant backlash. Despite the Wagner Group’s blatant ties to the Russian government, it is able to sufficiently distance its activities from official Russian policy to maintain deniability and hence legal or military repercussions from the international community. In summary, the two most potent elements of Russia’s hybrid warfare activities are the use of proxy forces and sophisticated digital propaganda.

	Ukraine	Venezuela	Central African Republic	Libya	Syria	Madagascar	Sudan
Economic Profiteering		X	X	X	X	X	X
Regime Stabilization		X	X	X	X	X	X
Targeted Propaganda	X			X		X	
Territorial Expansion/Reclamation	X				X		
Overseas Basing Rights	X				X		
Direct Election Interference						X	

Figure 1: Russian Employment of the Wagner Group by Nation and Activity³³

Chinese Hybrid Warfare Theory

The distinct differences in how Western and Eastern military philosophers historically viewed warfare also play into the different understandings and uses of hybrid warfare. Chinese views on warfare are identifiable as far back as Sun Tzu's work 2500 years ago. The tradition of Sun Tzu's works was shaped by the competing Chinese ideologies of Confucianism and Legalism.³⁴ The Western tradition tends to focus on achieving a culminating decisive battle that overwhelms the enemy's army and leads to absolute victory. This philosophy is inherently offensive and active. Contrastingly, the Eastern tradition focuses on winning wars through indirect means and optimally without ever having to fight. When battles do occur, they should be at a time and place of one's own choosing to negate the enemy's advantages. The modern expression of the Eastern military tradition in China is the concept of People's War.

Mao Zedong's *Selected Works* are the foundation of Chinese military thought on the concept of People's War. The *Selected Works* are a collection of Mao's observations of his

application People's War throughout the Chinese Civil War.³⁵ As the Chinese Communist Party (CCP) leader, Mao found himself in charge of a vastly materially inferior force than his rival nationalist Kuomintang (KMT). To overcome the challenges the CCP faced, it adopted a different approach to warfare that ultimately led to its success in the Chinese Civil War.

People's War is the art of pragmatism in the face of a conventionally superior adversary. Casual observers often conflate People's War with guerilla warfare; however, to do so is to oversimplify the concept vastly. Mao was an avowed Communist, and the CCP's foundations are grounded in Marxist-Leninist Theory. Mao's view of communism differed from the Leninist model in Russia in that he viewed the peasant class, as opposed to the Marxist-Leninist urban proletariat, as the most likely group to support a revolution. While elements of the CCP emerged in cities during its genesis in the 1920s and 1930s, the movement ultimately formed in less governed rural expanses of China.³⁶ With few resources of their own, the CCP focused on gaining the only currency available to them – the peasant population's support.³⁷ Shaping the opinion of the peasant population became the cornerstone of People's War. Once established, such provided material resources, tacit acceptance of the CCP's presence, and manpower to wage the conflict.

Mao and the CCP combined the necessary pragmatism forced by their material reality with the indirect and fluid approach to warfare prominent to the Eastern military tradition. The conduct of People's War shifted as the material condition of the CCP improved. Initially defensive in nature, the strategy focused on the long-term consolidation of incremental gains.³⁸ This initial stage of People's War avoided unnecessary risk and relied on mobility to avoid the conventionally superior KMT except in instances where victory was certain. Guerilla tactics and blending into the populace were commonplace.

Once the CCP gained sufficient military strength and popular support, People's War evolved into a conventional conflict.³⁹ This not only provided legitimacy to the CCP, but allowed a decisive win over the KMT, which was not possible in the previous cautious guerilla phase of the conflict.⁴⁰ The sole constant throughout the conflict was the need to maintain the support of the populous. The CCP accomplished this through targeted propaganda and also reasonable behavior toward the peasant population. Since the CCP depended on the peasants for supplies, they avoided being coercive and stole as much as possible from the KMT to avoid resentment. The CCP knew its words and deeds needed to be congruent to convince the local population that it was a better alternative to the KMT.

The CCP wanted to encourage mass popular participation in the conflict. Support came in various forms, from direct participation in fighting to passive acceptance of the CCP presence. Mao conceived People's War as a flexible process where tactics evolved to the current situation. People's War was not quick and decisive; instead, it emphasized strategic patience and practicality. Tactics ranged from guerilla warfare to conventional conflict and possibly both simultaneously.⁴¹

After Mao died and Deng Xiaoping became China's ruler, the prominence of People's War in Chinese military discourse decreased. Deng believed China needed to modernize its economy and military to become a major world power.⁴² The professionalization of the Chinese armed forces made the citizenry's mass popular participation less important. This trend continued as China gained economic strength and was able to fund more costly and complex military equipment. The People's Liberation Army (PLA) and People's Liberation Army Navy (PLAN), initially militia forces, became formal military institutions. However, the presence of militias did

not cease, and ground and naval militias continued to exist as loosely organized bodies, more a product of tradition and reverence of the revolutionary spirit than military necessity.

Scholarly debate over Chinese use of hybrid warfare reemerged in 1999 after the publication of the book *Unrestricted Warfare* by PLA Senior Colonels Qiao Liang and Wang Xiangsui. Members of the PLA widely read their work, suggesting it had a significant influence.⁴³ *Unrestricted Warfare* provided a framework to understand the basis of Chinese thought on hybrid warfare now that PLA had undergone significant modernization. Liang and Xiangsui advocated "using all means, including armed force or non-armed force, military and non-military, and lethal and non-lethal means to compel the enemy to accept one's interests."⁴⁴ Their work was echoed in the *Three Warfares Doctrine* as adopted by the Chinese Central Military Commission in 2003.⁴⁵ Focused at the strategic level, the three elements of the doctrine are psychological warfare, media warfare, and legal warfare.⁴⁶ All three elements emphasized shaping foreign public opinion and justifying China's foreign policy positions, especially China's territorial claims.

Chinese Hybrid Warfare Operations

While *Unrestricted Warfare* and the *Three Warfares Doctrine* signaled an evolution in Chinese military and strategic thought, the concept of People's War did not fade away. Instead, it evolved as well to meet the modern material conditions and Chinese strategic interests. The most prominent actor in modern Chinese use of hybrid warfare has been a remnant of the era of People's War, the People's Armed Forces Maritime Militia (PAFMM). The PAFMM saw limited operational use throughout the Chinese Civil War but successfully stopped KMT raids on coastal cities.⁴⁷ The PAFMM's most prominent event during the Mao era was its role in the 1974 Battle of the Paracel Islands. At the time, South Vietnam had a superior Navy to China, but the

PAFMM negated the conventional advantage by seizing the disputed islands.⁴⁸ As Deng Xiaoping pushed the modernization of the Chinese military, the prominence of the PAFMM declined. In 2009, the PAFMM reemerged to begin waging a “People’s War at Sea.”⁴⁹

China is currently undertaking a vast effort to consolidate its control of the South China Sea (SCS), and the PAFMM has been a key tool to achieving this end. China has made extra-territorial claims under its Nine-Dash Line construct that defy international law and threaten to destabilize the entire region.⁵⁰ To gain de facto control of the SCS, China has constructed island outposts on Woody Island throughout the Spratly and Paracel Islands by dredging sand onto existing reef structures. International law does not recognize these artificial islands as valid territory. However, China readily uses them to project combat power deep into the SCS with little resistance from the international community.

These outposts create a defensive bubble that supports numerous Chinese ambitions, most notably Taiwan's re-integration into the PRC. The islands now host aircraft runways that support People Liberation Army Air Force (PLAAF) forward operations.⁵¹ Economics also drive China's behavior, with over \$5 trillion in goods transiting through the SCS annually, amid estimates of an untapped reserve of 11 billion barrels of oil and 190 trillion cubic feet of natural gas in the region.⁵² Additionally, the Chinese population has grown increasingly dependent on fish while simultaneously growing in size, forcing fishermen to venture further into the SCS to meet demand.

China's aggressiveness in the SCS has the potential to lead to conflict. Brunei, Indonesia, Malaysia, the Philippines, Taiwan, and Vietnam have rival claims in the SCS.⁵³ Despite recent tensions, the US and the Philippines maintain a mutual defense treaty. Japan, which also has a mutual defense treaty with the US, also has an East China Sea (ECS) territorial dispute with

China over the Senkaku Islands.⁵⁴ It is realistic to believe a regional conflict could lead to a great power war between the US and China. China understands this reality, which is why it has used hybrid warfare tactics to achieve its extra-territorial goals. Despite initial claims it was establishing the islands for peaceful civilian purposes, China built military infrastructure and stationed troops on them soon after construction.⁵⁵ Since the islands fall within the disputed or legally recognized territory of other nations, overt military control of the waters surrounding them has the potential for escalation. To assert its claims, China has leveraged the PAFMM.

The reemergence of the PAFMM began in 2009. The *USNS Impeccable*, an oceanographic research ship, was conducting routine operations in international waters 75 miles south of Hainan Island when five Chinese merchant vessels began a hostile confrontation with the ship. The merchant militia vessels ensured the *USNS Impeccable* could not continue its operations and were eventually joined by Chinese Coast Guard (CCG) and PLAN vessels. The collective created an envelopment of the *USNS Impeccable* with the PAFMM units in closest proximity, followed by CCG vessels and finally PLAN ships on the outer periphery. The standoff led to the *USNS Impeccable* leaving the area, and the interaction between China's three sea forces became a new template for staking its territorial claims.⁵⁶

The use of the PAFMM accelerated in 2012 after President Xi Jinping replaced Hu Jintao as Chairman of the Central Military Commission as China's island-building campaign began in earnest. China has since used the PAFMM to assert de facto control over disputed reefs, and most confrontationally with Vietnam and the Philippines. The PAFMM has also harassed US warships operating in the area. Although the PAFMM claims to be a militia force, China has made significant investments into the PAFMM to make it a professional force. Commercial fishermen continue to serve in a militia fashion, but China has also created dedicated PAFMM

units whose sole purpose is militia activity.⁵⁷ This modernization has allowed China to use the PAFMM for increasingly politically sensitive operations that an untrained and ill-equipped force could not be trusted to execute.

The nebulous status of the PAFMM makes it an attractive option to conduct hybrid warfare operations. The PAFMM is considered a military force under Chinese and international law; however, attribution and direct control by the Chinese government is difficult to prove in many instances. Because of this, it is difficult for nations to use force against PAFMM vessels, and when they are able to do so, it must be tightly controlled. This leads to a stalemate, which in turn allows the Chinese to establish a new status quo around disputed territory. The PAFMM also is cost-effective relative to the use of PLAN vessels, allowing China the requisite time needed to change the norms in the SCS.

While still nascent, China is also developing an international social media presence to counter-narratives that reflect poorly on the CCP and influence domestic populations abroad. China has demonstrated the capability to do this in both an overt and covert manner, with a massive force of social media influencers in the case of the latter. Given the success of Russian disinformation campaigns in the West, China will most likely seek to replicate similar tactics. There are signs China's capabilities at home, where an estimated 100,000 personnel work to shape the online speech ecosystem, is being converted to focus on foreign targets.⁵⁸

Composite Hybrid Warfare Defined

There are several discernable characteristics of hybrid warfare that are made apparent after examining how Russia and China approach such operations. First, hybrid tactics are often designed to overcome the relative advantage of an adversary. The US has enjoyed conventional

superiority in most categories for decades, explaining why its adversaries have made hybrid tactics staples in their strategies. Closely related to offsetting conventional superiority, hybrid warfare tactics also tend to operate below the threshold of full-scale armed conflict. Hybrid tactics attempt to prevent escalation to a conventional conflict which itself serves to offset conventional advantage. Some level of plausible deniability is often a key element of escalation control, although the description of "plausible" is often questionable. Third, hybrid tactics usually account for the political and psychological elements of warfare. Hybrid tactics may directly target the will of an adversary's population through propaganda and generating untenable political situations, such as when civilian casualties are unavoidable. Fourth, hybrid tactics often attempt to create an asymmetry in cost. The costs may be monetary, attrition of personnel, or even time. Fifth, adversaries use hybrid warfare to re-establish norms in the operating environment in their favor without incurring substantial costs caused by conventional conflict. This was most notable in Russia's actions in Ukraine and China's SCS claims. Finally, hybrid tactics are adaptable. This is perhaps the primary reason scholars argue if hybrid warfare even exists as a distinct entity. They argue that without limiting principles, anything can be considered hybrid warfare. Debate on this point will undoubtedly continue; however, for this thesis's purposes, that discussion is foregone. Instead, it will move forward with the assumptions that the reader 1) accepts hybrid warfare as a distinct entity or at least appreciates there are significant differences between how the US and its adversaries approach warfare and 2) tacitly accepts the provided working definition in relation to the broader discussion.

To facilitate further examination of hybrid warfare for this thesis's purposes, it is now appropriate to propose a definition. Ultimately, academia and the military establishment must give further treatment to the subject to reconcile the various strains of thought and create a

standard definition; however, this effort goes beyond this work’s scope. Instead, a preliminary definition is offered to serve as a point of departure for further discussion of the US's hybrid warfare application. *Hybrid warfare is an approach that focuses on achieving a desired end-state at the lowest level of conflict through a combination of conventional and unconventional instruments of power.* This definition's scope risks criticism as being overly inclusive to the extent that it is not sufficiently descriptive. However, instead of focusing on the broad array of hybrid warfare tactics that exist, this simple definition attempts to capture the *intent* behind hybrid warfare tactics. In many respects, hybrid warfare is a mindset to approaching conflict and falls outside the normal categorization of military action. Arguably, hybrid warfare has proven so effective due to its paradigm-breaking nature.

Nation/Action	Russia	China
Influence Operations	X	X
Proxy Forces	X	X
Status Quo Revision Short of Conventional War	X	X
Plausible Deniability	X	X
Asymmetric Advantage Against Adversary Strengths	X	X
Direct Action	X	*

* While direct action usually connotes ground-based infantry tactics, in the context of the maritime environment, the PAFMM’s activities qualify as ‘direct action.’

Figure 2: Composite Analysis of Chinese and Russian Hybrid Warfare Operations

US Strategic Thought and Values

To understand how the US can implement hybrid warfare, it is first necessary to outline the complexities of US strategic culture. Foreign policy priorities differ between Presidential administrations but tend to follow observable patterns over time. Unlike Russia and China, the US's strategic culture centers around what George Kennan referred to as "moralism and legalism."⁵⁹ By this, Kennan meant the US tends to view potential actions based on their legal and moral justifications. This view developed from a rejection of the realist European power politics the US has disdained since its founding. Hybrid warfare tends to intellectually run counter to the ideas of morality and legality since it often operates in the nebulous areas of both. The US also tends to view war binarily: either a state of war or peace. The US often views the delineation between war and peace at the point of overt military force. Doctrinally, the US views conflict in distinct phases.⁶⁰ Despite this construct appearing as a spectrum of conflict, it functionally serves as a rigid set of categories. Additionally, the US demonstrates a clear bias towards technology, positive public approval of military actions, and neatly concluded wars whose outcomes are not left in question.⁶¹ Given the US predilections to conduct warfare in a conventional vs. hybrid capacity, it is unsurprising the US has struggled to effectively respond to these tactics when used by adversaries such as Russia and China.

Despite the cultural challenges the US faces in adopting a hybrid warfare strategy against China, US application is both feasible and not unprecedented in recent history. Although the GWOT accounts for much of the recent record on US operations, hybrid warfare should not be conflated with counter-terrorism. There are structural similarities that indicate the US is capable, albeit at times begrudgingly, to operate outside of a conventional manner. The GWOT required significant shifts in authorities, organizational structures, and mindsets to tackle the hybrid threat

posed by violent extremist organizations. This dynamic change was acceptable due to the framing of the situation. The US public tends to support involvement in conflicts framed around a moral or idealistic narrative that faces an existential threat.⁶² The Soviet Union and terrorist organizations were more overtly threats, but the Chinese threat is no less significant. To garner the requisite public support to counter China and use hybrid warfare tactics, leaders must consider the appropriate and arguably more accurate framing of China's threat. Given China's oppressive political system and seeming willingness to support nations with similar proclivities, China poses a real threat to western democratic institutions.

The global information ecosystem will also challenge the US's ability to leverage hybrid warfare. The US values a free, open press. Targeted propaganda campaigns from US adversaries accompanied by the mass proliferation of non-traditional news sources that often have questionable editorial standards have led to the term "fake news" becoming a household term. US policymakers will naturally feel cognitive dissonance when employing hybrid warfare media tactics. The US Army Special Forces recently made headway towards gaining authorities to use what it has termed "influence artillery." Influence artillery refers to the ability to deliver targeted media campaigns to populations where SOF desire to shape public opinion in support of operations.⁶³ The US must develop detailed policies to place constraints on what type of media it ultimately generates to prevent the proliferation of misinformation or disinformation to the American public. The US must accept some risk of "information blowback;" to do otherwise would be unilateral disarmament in an increasingly significant warfare domain. To mitigate information warfare's externalities, the US should maintain a strict separation between its official means of communication and its hybrid warfare practitioners. As far as is possible in an age of

international media flows, the US should target local foreign information outlets that are more likely to influence foreign audiences than the US populace.

To employ hybrid warfare effectively, the US must also overcome its bias towards high-end technological solutions to problems. One of the main advantages of hybrid warfare is its relatively low cost to achieve the desired outcome in conjunction with its ability to impose costs on the adversary. The US must break with the current paradigm that encourages highly capable and tested assets and instead leverage more affordable, deniable, and adaptable commercial capabilities. Thankfully, in some cases, this is not a zero-sum proposition: special forces and foreign advisory capabilities currently designed to shape the environment to deter or fight a conventional war are also well-suited for hybrid warfare.

Ends - US Strategic Goals in the Indo-Pacific Region

US strategy in the IPR fluctuates over time and especially during changes in presidential administrations, but several consistent tenets can be discerned. Several themes between the National Security Strategies (NSS) of the Trump (2018) and Obama (2015) Administrations are likely to be enduring moving forward in regards to China and the IPR as a whole.⁶⁴ Both documents make clear the US desires to maintain its status as the leading power in the IPR. Additionally, there is an expressed willingness to cooperate with China where possible accompanied by an acknowledgment the US will compete to maintain its status in the region. There is also a common belief that China's behavior against other nations in the region is problematic, especially its territorial claims and economic coercion. From a realist perspective, amid shifts in the global distribution of power, the US wants to maintain its place atop the global military and economic hierarchy and ensure the international order's continuity under favorable circumstances. Therefore, a fair conclusion is that the US wishes to 1) maintain its military and

economic status relative to China and 2) preserve the current international order. Both of those endstates will be difficult, if not impossible, to obtain without the use of hybrid warfare.

Means – Proposed Organizational Structure

To effectively maintain its influence in the IPR, the US must find ways to counter China's use of hybrid warfare. While the use of the military, especially SOF, has become a default solution to many complex problems, countering China requires a different approach. During the GWOT, representatives from various government organizations frequently augmented SOF units under the Joint Task Force structure to affect targets at the tactical level.⁶⁵ The National Security Agency (NSA), National Geospatial-Intelligence Agency (NGA), Central Intelligence Agency (CIA), Department of Treasury, and the Federal Bureau of Investigation (FBI) developed strong relationships and interoperability. A hallmark of the US SOF community is its ability to establish networks to counter specific issues, especially when SOF lacks the expertise or authority to conduct a specific function. Throughout the GWOT, this structure was effective and logical. Since SOF were the primary actor in tracking and eliminating terrorist threats outside the US, the relationship between SOF units and other governmental organizations was one of "supported – supporting." The supporting organizations were critical enablers, but they rarely took physical action against terrorist targets. A similar integration and cooperation level is required to counter China; however, a more applicable structure is the Joint Interagency Task Force (JIATF) used to prosecute drug traffickers.

The US government established the JIATF structure to formalize Department of Defense (DoD) support to law enforcement in support of counternarcotic operations and has since expanded to include broader transnational organized crime.⁶⁶ The JIATF model allowed the DoD to support law enforcement, which was problematic given the Posse Comitatus Act's restrictions

on the federal government's ability to use military forces to enforce domestic laws. Additionally, it provided a venue to layer the authorities and expertise of other US government organizations together. As was demonstrated, such cooperation provided the necessary flexibility and speed to interdict drugs.

A JIATF is unique from a JTF in terms of the centrality of mission execution. Under the GWOT's JTF structure, DoD elements were the primary actors, with other agencies supporting those operations. Contrastingly, the JIATF's law enforcement mission requires numerous entities to act against criminal activity physically. The JIATF structure serves to synchronize the interrelated activities of various law enforcement agencies and supporting organizations. For example, a Treasury representative may identify and block illicit financial transactions in coordination with a DEA representative who will simultaneously make a physical arrest. Both are independent actions against a criminal organization whose results are interdependent. The JIATF structure creates a balance between several interrelated mission areas by de-emphasizing any single part of the organization.

To effectively conduct hybrid warfare operations to counter China in the IPR, the US should adopt the JIATF structure. Since hybrid warfare involves a diverse set of missions, the JIATF structure is optimal to synchronize operations and capabilities. For this discussion, the notional JIATF will be referred to as "JIATF-IPR." To counter China effectively, JIATF-IPR requires membership from several US government and partner nation entities. As a starting point, such a structure would have membership from the DoD, CIA, US Special Operations Command, Department of Treasury, Department of State, FBI, and NSA. Since hybrid warfare inherently involves political risk, a civilian political appointee should lead JIATF-IPR. For

reasons that will become evident in the following "Lines of Effort" section, the JIATF-IPR structure requires several sections working in concert to accomplish its mission.

Additionally, the current operating model of the counter-drug JIATFs, JIATF-West and JIATF-South, must evolve for the hybrid warfare mission. Synchronized interagency *operations* are the center of gravity of a potential JIATF-IPR. The disaggregated execution of operations inherent to the counter-drug JIATFs is not feasible for hybrid warfare. First, there currently is no organization equipped to execute hybrid operations to carry out operations. Second, the complexity of hybrid warfare operations requires a level of interoperability that far exceeds coordination alone. In this regard, the operational focus of the JTF model is more appropriate. The interagency “whole of government” approach characteristic of the JIATF model combined with the operational focus of the JTF will establish an operating model enabling quick, complex, and coordinated operations required to execute hybrid warfare effectively.

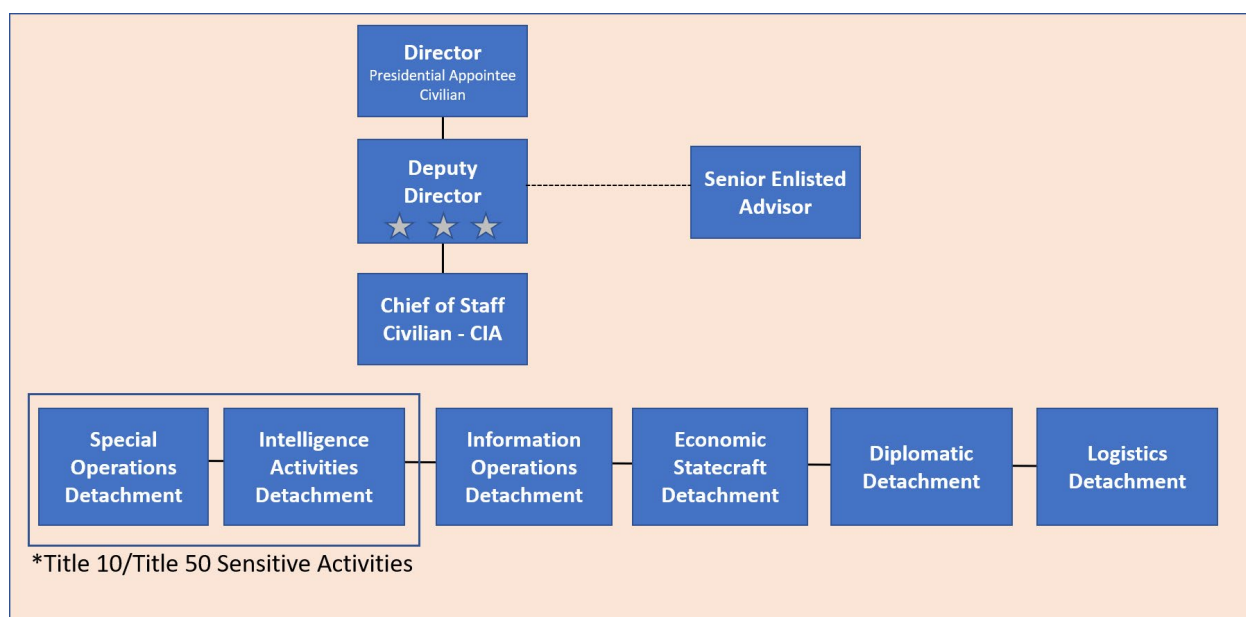


Figure 2: Proposed JIATF-IPR Structure

Figure 2 references a proposed structure for JIATF-IPR. This proposal serves as a starting point. In the event of a stand-up of JIATF-IPR or a similar organization, the US government should conduct a thorough mission analysis using current intelligence to refine specific unit responsibilities and task organization. Although the organizational structure appears hierarchical, the purpose of the components of JIATF-IPR is to escape the silos that generally exist between US government agencies. Successful US employment of hybrid warfare requires complete synchronization and speed across the elements of national power. The organization should be led by a civilian executive branch appointee, preferably from the National Security Council, due to its operations' politically sensitive nature. An executive branch employee is best suited to navigate the complex political environment inherent to hybrid warfare. This structure is similar to how Russia employs the Wagner Group, where the close relationship between President Putin and Dmitry Progozhin allows the organization to operate efficiently by avoiding layers of bureaucracy and rival internal political groups. Given some of the proposed operations' military nature, a military deputy is optimal to balance the leadership team.

The Chief of Staff should be a member of the CIA, given its unique covert action capabilities and authorities, to ensure oversight of the most sensitive activities conducted by JIATF-IPR. A Special Operations Detachment alongside an Intelligence Activities Detachment creates an optimal overlap of authorities and capabilities that proved effective during the GWOT. The Special Operations Detachment provides the vital capability to train partner forces. To leverage the full spectrum of US power and have the requisite capabilities to conduct hybrid warfare, JIATF-IPR should also include an Economic Detachment, Diplomatic Detachment, and Information Operations Detachment.

While sanctions through the Department of Treasury will remain potent tools, the Economic Detachment's focus should be economic incentivization to support US policy end-states. China has proven particularly effective at utilizing its economic influence through trade agreements and infrastructure development, often in a predatory manner. US interests in the IPR are ultimately economic, and providing a viable alternative to China is pivotal to the US's continued power. Trade agreements ultimately tend to reside at the strategic level as agreements between nations. The Economic Detachment's role would be to facilitate those large-scale agreements, but primarily to maintain responsibility for smaller-scale economic agreements focused specifically on bolstering US influence. Targeted infrastructure projects with few preconditions provide strong returns on investment, as demonstrated by the Chinese.

Finally, JIATF-IPR should include a unique logistics detachment. Along with the complex logistics problems JIATF-IPR's operations would present, the Logistics Detachment would focus on developing low-cost, commercial off-the-shelf (COTS) and deniable solutions to operational problems. Instead of high-costs and prolonged development timelines, the Logistics Detachment would accelerate the process, saving time and money by avoiding the standard bureaucratic challenges associated with capability development.

Authorities

While the realignment of specific statutory authorities is beyond the scope of this work, the subject requires a brief consideration to ensure the success of JIATF-IPR's efforts. As previously stated, the US tends to view the world in a legalistic manner. The subordination to the minutia of the law over operational effectiveness is at times an important safeguard; however, it can also hamstring legitimate efforts for fear of unforeseen legal ramifications. An important lesson from the GWOT was that the proper alignment of authorities is critical to operational

success. Where authorities were over-restrictive or improperly clarified, operational paralysis ensued. Although the US eventually overcame these challenges during the GWOT, they are not worth repeating as the rebalance to GPC occurs.

Under the JIATF-IPR construct, the congregation of the various elements of national power naturally brings the accompanying authorities normally granted to those elements. While the majority of the activities conducted by JIATF-IPR fall broadly under existing authorities of the US Code, the interaction between those authorities is a potential friction point. Given the nature of the integrated operations of JIATF-IPR, any level of segregation of authorities will be problematic. To resolve this issue, the authorities vested to JIATF-IPR must be customized to meet its unique mission and avoid the stove-piping caused by authorities' normal association to specific agencies. This does not imply that agencies without the requisite expertise conduct specific missions, but instead that decision-making authority on how those missions are conducted is vested in the JIATF-IPR leadership instead of through the headquarters or regional elements of the various involved agencies.

The interaction of JIATF-IPR and the existing government organizations in the IPR must also be addressed. The most significant possible friction points are between JIATF-IPR and the Indo-Pacific Command (INDOPACOM), the various US Ambassadors, and the Central Intelligence Agency. As is common inside the US government, there is a risk of counterproductive duplication of missions and fierce infighting for resources and missions. Common “best practices” to reduce tensions such as trading liaisons and synch meetings are wise but alone will not suffice given the levels of complexity and interrelated nature of the various organizations' actions. To avoid potential pitfalls, the missions and authorities prescribed to JIATF-IPR must be outlined statutorily and reinforced via the Executive Branch in execution.

This underscores the need to have a Presidential appointee answerable to the National Security Council as JIATF-IPR's leader.

Finally, for JIATF-IPR to successfully conduct hybrid warfare, it will require unique acquisition authorities similar in nature to those of US Special Operations Command.⁶⁷ Specifically, JIATF-IPR should not be bound to the DoD's highly structured Joint Capabilities Integration and Development System (JCIDS), Planning, Programming, Budgeting, and Execution (PPBE), and Defense Acquisition System (DAS) system due to its long development timelines, costliness, and inherent inflexibility. Instead, JIATF-IPR should be granted acquisition authorities that allow it to purchase COTS equipment, develop and test equipment internally, and allow risk tolerance to encourage the development of new capabilities. Additionally, a large portion of JIATF-IPR's funding should not be tied to specific line items to allow for sufficient flexibility to prioritize efforts in a highly fluid environment.

Ways - Chinese Vulnerabilities to Hybrid Tactics

As noted in the previous discussion of Russian Active Measures, every society has natural tension points vulnerable to exploitation. In the instance of China, several issues threaten the CCP's legitimacy. Despite claims of being a multi-party democracy, the CCP and the Chinese state institutions are one and the same. The CCP claims performance-based legitimacy and is therefore sensitive to public opinion.⁶⁸ The CCP leverages Han nationalism and improvements in the population's economic condition as pillars of its legitimacy. Despite frequent protests throughout China, the CCP has successfully redirected the population's discontent towards local party officials instead of the national party establishment.⁶⁹ Given the Chinese population's massive size, substantial economic growth has been the CCP's primary focus to increase per capita gross domestic product to lift Chinese citizens from abject poverty.

The economic dimension of CCP rule is a critical vulnerability. The revolutionary nature of People's War that brought the CCP to power predicates continued rule on delivering on its promises of a continuously better standard of living for the population. As seen with numerous other revolutionary movements, the real challenge is one of governance once the conflict terminates. During the Mao era, the CCP rested its legitimacy on its revolutionary successes, underpinned by Mao's legendary status. Once Mao died and Deng Xiaoping came to power, the CCP's primary basis of legitimacy shifted to economic prosperity.⁷⁰

Economic considerations in China have numerous dimensions. First, there is a substantial barrier to economic mobility for those who are not members of the CCP. To consolidate its control of the economy, the CCP embeds itself into major businesses. State oversight of private industry allows the CCP to decide winners and losers in the Chinese economy and exclude those who are not part of the party establishment from gaining significant economic power.⁷¹ This creates a cleavage between the CCP and non-CCP Chinese who are excluded from economic mobility.⁷² Second, China is a multi-ethnic nation. The majority ethnicity in China is Han, which is also the group that comprises the CCP. The exclusion of minorities from economic mobility creates a second cleavage in society. Third, there is a growing gap in the economic disparity between the urban and rural populations. Approximately 850 million Chinese citizens live in urban areas, and 550 million live in rural areas.⁷³ As China continues to increase its industrial capacity, urbanization increases commensurately. Wealth and social mobility are more readily available to urban than rural populations, creating tensions between the two groups as economic disparity grows. These three cleavages present threats to CCP legitimacy and are therefore potential targets for hybrid warfare operations.

The CCP's legitimacy is also based on its ability to restore China's status as a world power, which is as much psychological as physical. China views its historical position as the central power in Asia, and in the context of globalization as a rightful global superpower. Chinese society views western colonialism and the Japanese occupation of Manchuria as a devastating period in its history. The Chinese believe these grievances occurred because China was weak economically and militarily.⁷⁴ This national narrative drives China to increase its economic and military capacity and regain control over its historical territory. The CCP is currently on a trajectory to achieve these aims, but the populous is still very sensitive to any perceived weakness of the Chinese military to return China to its rightful status. By undermining the perceived competence of the Chinese military, the US can exploit a significant cultural cleavage.

Line of Effort 1 – Countering the People's Armed Forces Maritime Militia

China's activities in the SCS threaten vital US national security interests. The tyranny of distance created by the vast expanse of the Pacific Ocean does not divorce the US from its interests as a Pacific nation. The sheer volume of global trade that transits the SCS makes freedom of navigation a vital US interest. Additionally, future US economic relationships are contingent on the US maintaining its status as the primary security guarantor for regional nations who may otherwise accede to the coercive economic power of China to the exclusion of the US. Thus far, the US has attempted to respond to China's hybrid warfare tactics with conventional force. The US's primary tool has been Freedom of Navigation Operations (FONOPS). FONOPS have allowed the US to point to concrete actions by sailing its warships through contested waters; however, they have had no effect on shaping China's behavior or shaping the operational environment.

A force capable of complex hybrid warfare operations such as JIATF-IPR is best suited to counter China's hybrid warfare operations in the SCS. By employing targeted information operations with a counter maritime militia force, the US can reshape the security situation to its favor, reassure allies, and put pressure on the CCP's need to maintain military legitimacy with an acceptable level of risk of escalation. To do so, the JIATF-IPR must focus its efforts on countering the PAFMM.

To establish a counter maritime militia force, the US must rely on its ability to effectively partner with allied nations. The US has no rival territorial claim with China in the SCS; however, several of its allies have legitimate claims that run counter to China's extra-territorial assertions. Given historical ties, location, and interests, the Philippines is the most logical partner. Other nations such as Vietnam and Japan are also suitable partners. Vietnam has already established its own maritime militia on which the US could build further capacity.⁷⁵

US SOF are accustomed to training partner forces from the GWOT. A maritime partner force is unique in principle but inside the realm of expertise found in Naval Special Warfare, particularly the Special Boat Teams. While SOF units can provide the actual training, implementing such a construct would require a whole-of-government approach suited to the previously discussed JIATF model. The aim of any such force would be threefold. First, it would directly challenge PAFMM units on the frontline of territorial disputes. Second, the units would integrate into the broader combined-joint construct of the JIATF unit and leverage the organic capabilities that complement a broader strategy against China. Third, the partner units would provide legal legitimacy to US actions. Regional nations are the aggrieved party in territorial disputes; therefore, it ultimately requires their sanction to execute.

Once established, a partner maritime militia force would be able to challenge de facto Chinese control of disputed territories and prevent further construction of islands. Such a force must have similar capabilities, professionalization, and most importantly, integration with conventional forces as the PAFMM does with the PLAN and CCG. Preferably, conventional integration would occur with US warships to ensure parity across the spectrum of maritime capabilities and establish effective deterrence from Chinese escalation. In conjunction with a dedicated campaign leveraging the other elements of US national power inherent to JIATF-IPR, the actions taken against the PAFMM by a partner force can catalyze a broader change of China's behavior in the SCS. Absent this shift in dynamics, China is likely to continue undeterred.

Line of Effort 2 – Countering Chinese Economic Coercion

President Xi Jinping launched the Chinese Belt and Road Initiative (BRI) in 2013 as one of his first acts as President. The stated goal of the BRI is to create an economic network spanning from the Middle East to Southeast Asia. China is the center of the network, with imports and exports flowing freely from its shores.⁷⁶ Conceptually, the BRI appears to be a net positive to the global economy; however, China's intentions are not innocuous. By establishing itself as the center of the system, China can dictate the system's rules. This allows China to exclude or punish other nations for non-economic activities as a means of coercive diplomacy.

Additionally, China has utilized predatory lending practices that trap nations in debt they cannot repay. Once nations default on the loans, China simply takes control of the infrastructure projects as a means of repayment.⁷⁷ The BRI upends the concept of global free markets and provides China with the requisite global infrastructure to expand its military presence. By creating a viable alternative to the current US-led international order, China threatens to upend

US dominance. The US initially attempted to counter the BRI through its participation in and leadership of the Trans-Pacific Partnership (TPP).⁷⁸ The goal of the TPP was to integrate trade and establish a common set of standards across member nations that ensured the US access to Asian markets. As the largest economy in the world, the US naturally enjoys a dominant position in shaping the terms of trade. Domestic political concerns prevented either major US political party from ratifying the treaty. China, which was previously excluded from the TPP, is now considering joining the trade agreement's successor, the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTTP).⁷⁹

Although agreements such as the TPP are usually negotiated at the highest levels of government, there is a complex relationship between localized and international economic agreements. JIATF-IPR can influence the local economic environment in favor of broader US economic interests. China has proven adept at transforming local economic agreements into broader economic and military relationships successfully for a few key reasons. First, the US offers aid with contingencies that reflect its broader ideological beliefs. These beliefs are arguably valid morally but view interactions between nations on a short-term basis. By demanding near-term capitulation on ideological grounds, the US fails to consider the realities developing nations face. Nations often instead opt to develop relationships with China, whose aid comes with few preconditions outside of future cooperation on a strictly economic basis.

The US has also fallen behind China in economic influence as a matter of physical presence. Chinese activity has emerged in several nations that caught the US by surprise. Nations with a minuscule economic impact on the US often hold significant strategic value due to their location. During the "unipolar moment," the US grew complacent, leaving a power vacuum China has eagerly exploited. Relationships with nations such as Micronesia, Palau, Vanuatu,

New Caledonia, and the Marshall Islands are major strategic issues in the event of a conflict between the US and China.

Countering China requires a blend of geoeconomic tools. JIATF-IPR can employ smaller-scale operational tools effectively. As a starting point, JIATF-IPR can facilitate projects that resemble typical aid, such as the building of schools, health facilities, or stadiums. The rapport gained from these projects then opens up opportunities for further cooperation on substantial military or dual-use projects such as port infrastructure. These gains can then be translated into broader economic and military influence and agreements.

While economic influence may seem disjointed as a hybrid warfare mission, it falls squarely into the proposed definition of hybrid warfare. Perhaps more than any other instrument of national power, the economic dimension can alter the status quo significantly without resorting to force. Additionally, the hybrid warfare capabilities resident to JIATF-IPR are not mutually exclusive. Actively shaping public opinion through covert means, collecting intelligence on Chinese activities, and managing the diplomatic implications of economic activity are all important to the overall success of the operation.

Operational Vignette

This thesis concludes with a notional scenario to illustrate how the paper's main arguments might play out. The hypothetical vignette, in the form of a fictional memo, aims to translate the thesis's complex and interrelated concepts into a practical narrative that helps convince readers of the utility in carrying out the paper's recommendations.

To: Director, Joint Interagency Task Force Indo-Pacific Region (JIATF-IPR)

From: Deputy Director, JIATF-IPR

Re: After Action Report – April Taiwan Incursion

Director,

Given the gravity of the recent events in Taiwan, I am certain you are consumed with questions from the President and Congress. In order to assist you with those inquiries, I want to provide you an accounting of the actions that took place from the perspective of our organization. While I hope to highlight the outstanding efforts on the part of our team, I also hope to provide an honest assessment of our shortcomings in order to continue the evolution of JIATF-IPR. Bottom line up front: under a framework of hybrid warfare concepts, fusing disparate US agencies and levers of power under a JIATF put us in a better position for competition.

Admittedly, the PRC's attempts to seize Taiwan using the same tactics used by Russia in Ukraine took most of the US government by surprise. Our Intelligence Department had identified unusual activities on the part of the PLA, but even our most well-placed sources were unaware of the impending operation. On the evening of April 5th, our partner force, the Filipino Maritime Militia (FMM), observed Chinese PAFMM vessels entering Taiwanese waters outside of

Tsoying Naval Base. Two PLA *Luyang II* DDGs were located in the vicinity of Hong Kong the previous day, with one in port and one underway just outside territorial waters. While outside of their normal operating areas, their activity was not particularly conspicuous.

On the morning of April 6th, CCG vessels began arriving northwest of Taiwan in what in hindsight was a picket formation to close maritime traffic to the Taiwan Strait. By noon, the JIATF-IPR Joint Operations Center realized the activity indicated an impending operation against Taiwan as communications intercepts revealed communications between the PAFMM's Sansha Militia and the East Sea Fleet Headquarters in Dinghai discussing the "Taichung landing area." The fact that the Sansha Militia, arguably China's most capable militia unit, discussed operations outside of the South China Sea gave our team immediate pause. It soon became clear the "Taichung landing area" was a reference to Taichung City on Taiwan's western coast.

An invasion of Taiwan seemed improbable given the normal PLA naval activity levels, but it was clear something significant was occurring. Unusual protests began erupting throughout Taiwan. We quickly learned that Chinese government "trolls" were agitating on social media, and a 'deep fake' video of Taiwanese President Tsai Ing-wen was circulating online. In the convincing deep fake, President Tsai Ing-wen discussed a potential merger with Japan and how she stood to profit financially from such an agreement. However improbable, the video touched on the painful memory of the Japanese occupation of Manchuria and struck a nerve with the Taiwanese citizenry. We later learned Chinese sleeper cells had been activated to coordinate the protests.

Fortunately, JIATF-IPR's forward headquarters in Singapore allowed us to respond quickly. By 1900 hours, the Chinese had launched a cyber-attack against the Taiwanese power grid, sending the entire island into darkness. The FMM, accompanied by elements from our

organic Special Operations Detachment, immediately mobilized from their bases in the Babuyan Islands, with over 75 disguised fishing vessels and five “motherships.” The infrastructure built by our Economic Detachment on the Babuyan Islands allowed for such a quick mobilization, and the relationships they established allowed us to get three commercial refueling vessels underway a short 6 hours later. We maintained close coordination with US Seventh Fleet, in anticipation of direct US intervention of what appeared to be an unfolding crisis. We quickly learned of the decision to pull US surface combatants towards Guam to prevent a surprise strike. Admittedly, we were unprepared to coordinate with the only US naval assets able to operate inside the Chinese weapons engagement zone, submarines. The submarines could not communicate due to strict EMCON procedures to avoid detection. While the contributions of the submarine fleet were critical throughout the crisis, we found ourselves alone on the ocean’s surface.

By early morning on April 7th, our understanding of the Chinese plan was solidifying. China had taken a cue from the Russian annexation of Eastern Ukraine, and were attempting to seize Taiwan using hybrid methods that would challenge the US’s conventional ability to respond. The PAFMM mobilization went far beyond our initial understanding, and hundreds of Chinese fishing vessels dropped off over 1,000 armed, plain-clothes PLA soldiers across the western coast. They immediately joined the protests in the morning, and began leading the ransacking of government buildings in Taipei. Simultaneously, China began a concerted information campaign claiming “nationalists” in Taiwan were reclaiming their government to prevent it from being “Colonized by the neo-imperialist Japanese.”

With an understanding of the situation in Taiwan, JIATF-IPR began its concerted hybrid warfare campaign against the Chinese incursion of Taiwan. First, the FMM forced the PAFMM into its first true “People’s War at Sea.” The PAFMM vessels that transported the PLA soldiers

into Taiwan loitered near the Taiwanese coast, most likely on standby in the event the plot failed and a hasty withdrawal was required. While the Sansha Maritime Militia's more advanced ships were on scene, the bulk of the PAFMM fleet was composed of commercial fishing vessels. JIATF-IPR knew the Philippine government would be reticent to start a direct conflict with China using the FMM, which was a contingency for which we had previously planned. The FMM and PAFMM had numerous encounters at sea over the past months over the disputed Spratly Islands. The encounters had been tense but ultimately peaceful. The height of conflict was aggressive maneuvering that impeded the other side resulting in a few minor collisions but no serious violent encounters. The same tactics were optimal to our broader plan.

The PAFMM and FMM began their normal routine when encountering one another, which quickly drew the PAFMM's focus into the tactical situation. The more professional Sansha Maritime Militia ships attempted to get the Chinese fishermen to disengage from the skirmishes, but some derogatory radio transmissions quickly drowned out any reason. Occupied with the FMM, the PAFMM and Chinese Coast Guard missed the quiet approach of *MV ENDURANCE* and *MV SUNRISE* into the Taiwan Strait. The two covered platforms were clandestinely operated by JIATF-IPR, and appeared to be mid-size commercial cargo vessels. JIATF-IPR's Logistics Detachment had provided the ships with several capabilities that proved decisive in halting China's efforts to invade Taiwan.

By 1400, *MV ENDURANCE*'s advanced jamming systems had scrambled the GPS and radio signals of the entire PAFMM fleet. The FMM was equipped with encrypted satellite communications equipment, which allowed the motherships to continue directing the FMM vessels. After receiving orders to withdraw from *MV SUNRISE*, the FMM consolidated towards

the Chinese coast, which confused the PAFMM. *MV SUNRISE* then unleashed its swarm of aerial drones and UUVs that quickly began disabling PAFMM vessels.

The loss of communications with the PAFMM caused the PLA to send one of its LUYANG II DDGs from Hong Kong into the Taiwan Strait to investigate. As PAFMM vessels fled, we feared they would alert the ship to the presence of the *MV ENDURANCE* and *MV SUNRISE*, which were defenseless against a conventional warship. Fortunately, US Seventh Fleet was able to transmit our locations to the *USS Minnesota*. A few well-timed pings of the submarine's active sonar convinced the Chinese to return to Hong Kong before entering the Taiwan Strait, lest they be left defenseless against the submarine's torpedos.

Simultaneous with the events at sea, JIATF-IPR began addressing the issues ashore in Taiwan. The Taiwanese government restored power to the island by mid-day on April 7th, albeit at a reduced capacity as Chinese cyberattacks continued in isolated portions of the network. President Tsai Ing-wen's cabinet was near revolt over the now-viral fake video of her discussing Taiwanese annexation by Japan. Our Diplomatic Detachment was in close communications with the Taiwanese government and was aware of the challenges facing their President politically. To prove the video was a fake, our Information Operations Detachment created several convincing deep fakes of members of the cabinet saying verbatim the dialogue of the video of President Tsai Ing-wen. Representatives from the Diplomatic Detachment quietly shared the videos with the Executive Yuan's key members, which quickly ended any internal division.

With signs of Chinese intent to send a second landing force into Taiwan, JIATF-IPR knew it would need to counteract the Chinese propaganda campaign to prevent further aggression. We later learned China was beginning to have doubts given the chaotic maritime situation in the Taiwan Strait, but there were signs of massing of amphibious forces that

indicated an operation was still a real possibility. The Information Operations Detachment quickly developed a deep fake video of President Xi Jinping discussing how stupid the Taiwanese were for falling for their propaganda campaign. At the conclusion of the video, Xi transformed into Winnie the Pooh, which made certain the video would go viral given the previous controversy over such a depiction of the Chinese President. The video was amplified by an automated army of ‘bots’ that spread the video on social media.

Additionally, the Information Operations Detachment began circulating hacked bank records for key CCP officials showing just how wealthy the bureaucrats had become at the expense of normal Chinese citizens. The tide finally turned when Taiwanese officials captured several of the PLA agitators, who the Information Operations Detachment gladly took soundbites from describing their instructions and how they had arrived on the island, and provided them to the US State Department. The international outrage and immediate sanctions by most western nations drastically changed China’s decision-making, and they decided to forego landing more troops into Taiwan. With the PAFMM unable to extract the PLA soldiers, the Taiwanese army quickly captured most of them. The international media narrative of the situation quickly morphed from Taiwanese nationalist protests to the “Chinese Bay of Pigs.” As you are aware, the diplomatic fallout on the part of the CCP has destabilized the regime to an extent that makes further aggression unlikely for the foreseeable future.

JIATF-IPR’s efforts during the April Taiwan Incursion demonstrated the utility of our organization. Lastly, I want to thank you for your steadfast support of organization from its founding. I am keenly aware of the political difficulties you faced while advocating for our increased funding and authorities. I hope our performance in preventing the Chinese incursion of

Taiwan vindicates further criticisms, and allows our organization and its hybrid warfare mission to continue to grow as a tool of national statecraft.

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