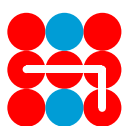


Hybrid CoE Trend Report 8

China's power politics 2.0: Regime survival and global leadership



Hybrid CoE

May-Britt U. Stumbaum – April 2022

Hybrid CoE Trend Reports highlight trends and theme clusters related to hybrid threats. They provide multiple perspectives on current security challenges and generate academic discourse on the topic. They aim to distinguish between what constitutes a threat, what appears to be a threat but is not necessarily one, and what has the potential to become one.

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Hybrid CoE's mission is to strengthen its Participating States' security by providing expertise and training for countering hybrid threats, and by enhancing EU-NATO cooperation in this respect. The Centre is an autonomous hub for practitioners and experts, located in Helsinki, Finland.

The responsibility for the views expressed ultimately rests with the authors.

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Executive summary¹

Eighteen months after the publication of Hybrid CoE's Trend Report 5 on China's power politics, the main trends identified (seeking great-power status, increased use of economic statecraft to enhance strategic interests, and regime preservation) are still valid – yet they have intensified, expanded, and changed in order of priority. This Hybrid CoE Trend Report provides an update on the trends identified in the previous report.

Regime survival is now the predominant trend. It is epitomized by Chinese President Xi Jinping and his campaign to achieve utmost control within China,² and over China issues worldwide. Regime survival makes all other intertwined trends subordinate to this one overarching strategy.

To this end, Covid-19 has worked as an ambivalent catalyst: the disastrous consequences of the pandemic have offered up ample opportunities for disinformation campaigns and initiatives to discredit the competence and methods of Western liberal democracies. Still, coping with Covid-19 is tying up enormous resources in all states affected. It has also increased pressure on the Chinese Communist Party (CCP) to deliver solutions, economic well-being, and safety to Chinese citizens in times of economic downturn. The CCP needs to legitimize its grip on power and the “mandate of heaven” more than ever.

Xi is running a historical campaign to remake Chinese society. He strives to mould a new society that is fit for the global competition ahead. Central to this campaign is ensuring that the people are absorbing the “right socialist val-

ues”. Spilling over to China's foreign policy, this approach manifests itself as a “whole-of-society approach” in hybrid threat operations, which aims to acquire control and shape an environment favourable to CCP needs. The CCP's siege mentality is part of its DNA and creation myth. Hence, understanding the role of ideology and the perceptions of the CCP is becoming essential in analyzing how domestic developments, structures, and paradigms spill over into China's foreign policy approaches.

Economic statecraft deriving from sanctions and incentives for conditioned development projects is therefore still the major instrument of choice. However, particularly given the equivocal success of sanctions to bring about policy changes in such cases as Australia and Lithuania, this might change. The focus could be shifting towards altering international norms and standards in a CCP-favourable fashion, duly changing the “rules of the game” *per se*.

The rather new trends of China-Russia cooperation and coordination, and China drawing on lessons from Russian hybrid threat operations have intensified. There is also a rise in awareness, resilience and resistance in affected states, particularly in Europe, North America and the Indo-Pacific.

After analyzing each of these trends in detail, this update concludes with an assessment of the ever-intensifying level of hybrid operations to be expected. At the same time, information exchange and expertise in and on the affected states will be boosted.

1 The author would like to thank Hybrid CoE for the terrific input received when participating in the Hybrid CoE Conference “Seeing Red” in Stockholm in November 2021, particularly Hanna Smith, Jukka Aukia and Janne Jokinen, as well as her co-panelists for their help, namely Una Bērziņa-Čerenkova, Konstantinas Andrijauskas, Filip Šebok, and Matti Puranen.

2 “China” refers to the government of the People's Republic of China (PRC), respectively the authoritarian One-Party State/the Chinese Communist Party (CCP), and does not refer to Chinese citizens as such. The CCP and PRC are used interchangeably. Taiwan refers to the Republic of China.

Key trends of the 2020 China Trend Report

The 2020 Hybrid CoE Trend Report 5 on *Trends in China's Power Politics*³ combines timely observations on the key China trends in 2020 with an analysis of their origins, identifying the underlying structures and issues that are spurring and driving these trends. Hence, it not only scrutinizes the factors behind Chinese operations per se, it also puts them in a global context to highlight the driving forces behind Chinese conduct.

The report investigates Chinese power projection through a hybrid threats lens. It aims to uncover the employed series of activities below the threshold of aggressive policies that would trigger retaliation. These activities are conducted in a broad range of domains. The report states that “China has adopted a mode of operation designed to create ambiguity by using multiple, synchronized vectors [...creating] a non-linear policy challenge by accumulating incremental objectives”.⁴ Hybrid threats are accordingly employed as force multipliers and coercion tactics. They compensate for apparently under-performing strategies and policies, and mounting challenges that China – and hence the Chinese Communist Party (CCP) – is facing.

In this regard, the report highlights three inter-related trends in particular:

1. spill-over effects that reveal China's increasing assertion of power in areas not strictly economic;
2. economic statecraft remaining the primary instrument through which China strives to further its strategic interests; and
3. regime preservation (and thus the CCP's continuing grip on power and control).

In addition to providing a comprehensive overview of the historical path, underlying structures and policies that constitute the highlighted trends, the 2020 China Trend Report recommends key aspects and developments to monitor.

3 Hybrid CoE, *Trends in China's Power Politics*.

4 Hybrid CoE, *Trends in China's Power Politics*, p. 8

General assessment of the current context

The highlighted trends still hold true today – yet the focus of each has shifted and partly intensified, and new influential trends have surfaced. Most importantly, their ranking has changed: regime survival, and with it the externalization of internal policies, now dominates and influences all policy fields and trends.

As the 2020 China Trend Report predicted, the CCP has rapidly increased predominantly cost-efficient hybrid threat operations in scope and scale in the past two years. These “grey zone” activities have involved active measures ranging from spreading disinformation to coercive actions. Activities include para- and civil-military actions such as cyberattacks and acquiring dual-use goods and infrastructure like airports and harbours. In addition, in a 2020 report, the Australian Strategic Policy Institute (ASPI) grouped China’s coercive diplomacy into several categories: arbitrary detention or execution, restrictions on official travel (further facilitated by Covid restrictions), restrictions on investment, trade and tourism, popular boycotts, pressure on specific, singled-out companies, and state-issued threats. They confirm that Europe became a prime target for China’s coercive diplomacy, even more than Australia, New Zealand and North America in the decade between 2010 and 2020.⁵

The Covid-19 pandemic has magnified approaches, tendencies and challenges in ambivalent ways. On the one hand, the CCP and its apparatus went into overdrive to manage

the global narrative on the origins of the virus and, among other issues, became embroiled in a self-harming trade war with Australia, whose government had called for an independent investigation into the origins of the virus.⁶ On the other hand, the CCP also effectively took the opportunity to undermine Western democracies by portraying them as an incapable regime type that is ‘letting people down’. In the same vein, China promoted its own authoritarian model and practices as a panacea.⁷

At the same time, the pandemic has amplified pressure on the CCP government to deliver a remedy and continuing economic growth for the Chinese people. It must appear strong and in control of the situation – at a time when economies worldwide are facing sharp declines due to Covid-19. While still faring better than some other national economies, China’s economy did slow down in 2021 due to Covid-19, the energy crisis and property woes.⁸

US election outcomes have further intensified pressure on the CCP. The Trump presidency was perceived in sum as rather beneficial for Chinese interests, with Trump alienating allies in the Asia-Pacific and Europe alike. The incumbent President Biden’s efforts to reinvigorate alliances and his claim that “the United States is back” would appear to have closed this unique window of opportunity for China to extend its power in a more or less unhampered way. A case in point is Taiwan. The CCP perceives the country as a renegade province which – as rumour has

5 Hanson et al., *The Chinese Communist Party’s Coercive Diplomacy*.

6 Walsh, ‘Australia Called for a Covid-19 Probe. China Responded with a Trade War’.

7 Vériter, ‘European Democracy and Counter-Disinformation: Toward a New Paradigm?’; Hajdu et al., ‘The Globsec Vulnerability Index’.

8 France24, ‘China’s Economy Slows as Covid, Energy Crisis and Property Woes Take Toll’; Lee & Tang, ‘Property, Covid-19 Challenges to Remain with China’s Economic Slowdown to Continue in 2022’.

it – will be integrated into the mainland way before the 100th anniversary of the People’s Republic of China (PRC) in 2049.⁹ Yet the sharp words on Taiwan at the virtual Biden-Xi meeting bear testimony to possible confrontation in this respect.¹⁰

The experiences of an “American decline” spurred by the Trump administration alienating partners, and the struggle to cope with Covid-19 have also led to a change of plans on the Chinese side. The plan to become “a great power equal to the United States” has been modified into becoming the world’s primary great power, bigger than the United States and unrivalled. Chinese President Xi used the recent 100th anniversary of the CCP to outline his plans. He warned that everyone getting in the way “will have their heads bashed bloody against the Great Wall of Steel forged by over 1.4 billion Chinese people”.¹¹

With the rejuvenation of CCP ideology, regime differences between the rather liberal “West” and illiberal regimes such as the PRC have a much greater impact on international relations. The emphasis on “systemic rivalry” in the latest EU China Strategy¹² is a first step in realizing that peaceful coexistence might not come naturally, if at all.

In sum, these contextual conditions have fuelled what Charon and Jeangène Vilmer call China’s Machiavellian Moment – as Machiavelli’s *The Prince* states that “it is much safer to be feared than loved”.¹³ As they explain, the CCP has extended its external policies from seducing and subjugating – including employing the charming narrative of ‘5000 years of history’ and an emphasis on ‘not losing face’ – to infiltration and coercion.¹⁴

9 Some experts say that the CCP has learned from the 1989 Tiananmen Massacre that the world needs 20 years to forget (given that the 2008 Olympic Games happened 20 years later). This would narrow down the window for taking over Taiwan to the years 2025–2029.

10 The White House, ‘Readout of President Biden’s Virtual Meeting with President Xi Jinping’; Borger, ‘Biden-Xi Virtual Summit: Leaders Warn Each Other over Future of Taiwan’.

11 Davidson, ‘Xi Jinping Warns China Won’t Be Bullied’; BBC, ‘CCP 100: Xi Warns China Will Not Be “Oppressed”’; Schuman, ‘Xi Jinping’s Terrifying New China’; *The Independent*, ‘China Reveals Plan to Become World’s Biggest Superpower within 30 Years’.

12 European Commission, *EU-China – a Strategic Outlook*.

13 Machiavelli, *The Prince*, p. 44.

14 Charon & Vilmer, *Chinese Influence Operations*, pp. 147, 161, 619.

Trend 1: Regime preservation as the most dominant trend

The previous Trend Report cites regime preservation as a vital strategic interest for China.¹⁵ The report rightly states that this is not a new trend, as regime survival in authoritarian state systems has always been a priority. Yet this particular trend has increased in scope enormously, and now predominates, influencing all others to the extent that they can be seen as instruments serving this prime objective.

More than before, domestic developments and circumstances in the PRC are shaping external policies today. The change from Hu to Xi was fundamental: former Chinese President Hu Jintao advocated the mantra of rising within the existing system (Hu's 'Harmonious World' with multilateralism for common security, win-win cooperation for common prosperity, inclusiveness for the coexistence of all civilizations, and UN reform without questioning the UN in its centrality).¹⁶ Instead, current Chinese President Xi Jinping proposes "changing or replacing the existing system to accommodate CCP interests". This harbinger a comprehensive re-engineering of Chinese foreign policy as well as Chinese society as such.

Two efforts have long run in parallel: internally, Xi aims to "mould a new Chinese society that will be instilled with proper socialist values – as he defines them – purged of corrupting individualism and other bad habits that have seeped in

from foreign (read: Western) cultures, and thus girded for the next phase of national struggle: the quest for global greatness".¹⁷ Externally, his initiatives strive to (re-)shape the international system.

These initiatives encompass the provision of alternative institutions (from the Asian Infrastructure and Investment Bank, BRICS, and the Conference on Interaction and Confidence Building Measures in Asia, all the way to Chinese Bitcoin, the "e-yuan"). They also feature grand schemes such as the "New Type of Great Power Relationship" offered to the United States in 2014.¹⁸ Most profoundly, they promote the 'China model' as a "new option for other countries [...] Chinese wisdom and a Chinese approach to solving the problems of mankind" (as stated at the 19th CCP National Congress and now enshrined in the CCP Constitution as Xi's thought¹⁹). The "Tian Xia" discussion that sees China at the core of a tributary system is also part of this grand design for a China-led new world.²⁰

Xi's "attempt to completely recast the economy and society to push it in a more socialist direction"²¹ is underpinned by a campaign fusing core parts of CCP practices. Historically, these include a "deep strain of paternalism" where the party "sees itself as the moral arbiter of state and society".²² The first signs of this were already evident in Document No. 9.²³ Widely circulated in

15 Hybrid CoE, *Trends in China's Power Politics*, p. 22.

16 Zheng & Tok, 'Harmonious Society'; PRC Embassy, Namibia, 'Harmonious World'.

17 Schuman, 'Xi Jinping's Terrifying New China'.

18 Carnegie, 'A New Type of Great Power Relations'.

19 Xinhua, 'Xi's Thought Enshrined in CPC Constitution'.

20 Rigby, 'Tianxia'; Puranen, 'All under Heaven as One Family'.

21 Schuman, 'Xi Jinping's Terrifying New China'; Saich, *From Rebel to Ruler*.

22 Schuman, *ibid*.

23 ChinaFile, 'How Much is a Hardline Party Directive Shaping China's Current Political Climate?'

CCP circles in 2013 and “bearing the unmistakable imprimatur of Xi Jinping”,²⁴ the document warns of the infiltration of Western values. It forbids teaching on seven dangerous Western values, including media freedom and judicial independence. A crackdown on media freedom, think tanks, journalists and lawyers duly ensued.

The most prominent recent examples of the CCP’s ambition to magnify domestic control included bringing Alibaba’s CEO Jack Ma into line; issuing a plethora of new regulations that will basically make it impossible for Chinese tech companies to raise funds abroad (which could expose the companies to non-Chinese influence); and pushing for “common prosperity”, including “adjusting excessive incomes”. The latter prompted major companies such as Tencent and Alibaba to donate more than 15 billion US dollars each to promote “common prosperity” immediately after the high-level meeting of the Central Committee for Financial and Economic Affairs where Xi had made his remarks.²⁵

Within Marxism-Leninism, forming and modelling an entire society is at the core of applying the ideology. “Remaking China” and its society has been part of the CCP’s DNA since the early days of the Party. Chinese President Xi Jinping shapes and epitomizes the CCP’s current direction of ever-tighter control and centralization. This direction breaks with decentraliza-

tion tendencies under previous presidents. The adoption of a “historical resolution”²⁶ – the third in the CCP’s history – by the 6th plenary session cements Xi’s status in political history and his claim to power. The resolution puts him on an equal footing with Mao Zedong and Deng Xiaoping, the fathers of the first two resolutions.²⁷

It should be noted, however, that this strategy towards ever-greater state control also breaks with the thus far winning formula for China’s impressive economic individual risk-taking, entrepreneurship and innovation. It was precisely the lessening of control that provided the leeway for economic growth. It boils down to a competition for the best approach to achieve a nation’s success – through liberal or illiberal structures.

In sum, Xi’s warning calls that liberal democracy is undermining the CCP’s claim to power (and stability and order in China accordingly) resonate well with a party that has felt under siege since the early days of the Long March. With domestic policy goals exerting an ever-greater impact on foreign policies, influenced by a nationalism based on narrow world views and victimization, this also means that domestic “regime preservation” increasingly affects international affairs. It essentially feeds systemic rivalry and renders the option of peaceful coexistence impossible.

24 Buckley, ‘China Takes Aim at Western Ideas’.

25 Dou, ‘Alibaba to Donate USD 15.5 Billion to Promote China’s “Common Prosperity”’; Liao, ‘Tencent to Donate USD 7.7 Billion’; Zhang, ‘Chinese Tech Giants Led by Alibaba and Tencent Donate Millions’; Xinhua, ‘Xi Stresses Promoting Common Prosperity Amid High-Quality Development’.

26 Historical resolutions are official summaries of the Party’s history from its formation in 1921 to the point of the resolution’s publication. They address leading political figures, key achievements, lessons learned, and directions for future policies. The highly important document is only the third of its kind since the Party’s foundation in 1921, with the first issued by Mao Zedong in 1945 and the second by Deng Xiaoping in 1981. It cements Xi Jinping’s role in the CCP’s history. For more information, see Wang, ‘Xi Jinping’s “historical resolution”’.

27 Yip, ‘China’s Xi Jinping Cements His Status with Historic Resolution’.

Trend 2: A “whole-of-society” approach

In line with the previous Trend Report’s prediction, the use of hybrid threats in the CCP’s modes of power projection has intensified sharply, with Covid-19 serving as an additional catalyst. Mirroring domestic developments, the CCP thereby employs in its holistic take on hybrid operations not only a “whole-of-government” approach, but a “whole-of-society” scheme. Its influence operations are executed by a variety of actors: Party bodies (e.g., the Propaganda Department, the United Front Work Department (UFWD), the International Liaison Department, the Communist Youth League and the 610 Office, and government bodies ranging from the Ministry of State Security to diplomats and the People’s Liberation Army); public and private companies; scholarly and student organizations, as well as members of the diaspora. Activities entail massive initiatives like the Belt and Road Initiative (BRI), and the strategic placement of Chinese staff in specialized UN sub-bodies and expert groups.²⁸

“Active measures” by the CCP encompass a comprehensive portfolio of legal, semi-legal and illegal operations. They are overt as well as clandestine and implemented by CCP organizations, front organizations specifically launched for such purposes, or the employment of recruited “useful idiots”. They include disinformation and manipulation, discrediting, counterfeiting and sabotage as well as destabilizing foreign governments, provocations, and so forth. They aim

at weakening social cohesion and putting foreign governments under pressure.

These activities are carried out and inspired to a large extent by the “United Front”, initially a Leninist policy incorporated by the CCP to eliminate internal and external enemies, control groups that could endanger its authority, and create a coalition around the CCP to support its interests and project its influence abroad. The United Front designated a threefold “dispositive of thoughts on society, the organisation of the CCP, and political action”.²⁹ After having purged the director of the United Front Works Department (UFWD), Ling Jihua in 2014, Xi once again put the United Front at the heart of the CCP’s activities, massively increasing its scope and resources, and urging its work to be carried out by all Party members.

Yet active measures are also supported by new instruments such as the “wolf warriors”, a handful of high-level spokespeople for the Ministry of Foreign Affairs and diplomats around the world. They aggressively attack views and statements through social media – having an “audience of one” in mind, Xi Jinping.

The “Three Warfares” doctrine (psychological, legal, and public opinion)³⁰ adopted in 2003 as the core of the CCP’s political warfare thereby strives in a non-kinetic sense to create – in the best Sun Tzu spirit – an environment favourable to China, which enables it to overcome an adversary without a fight. This undertaking continues in both wartime and peacetime.

28 Charon & Vilmer, ‘Chinese Influence Operations’; Chhabra et al., ‘Global China’.

29 Charon & Vilmer, ‘Chinese Influence Operations’, p. 35; Jourda, ‘Les Usages Post-révolutionnaires D’un Canon Orthodoxe’.

30 “Three warfares” is an official political and information pre-kinetic warfare strategy of the People’s Liberation Army (PLA) employing media or public opinion warfare, psychological warfare, and legal warfare. Announced as work regulations, three warfares was introduced in the amended Political Work Regulations of the PLA in 2003. For further information, see e.g. USNN, “‘3 Warfares’ Doctrine Underpins CCP’s Sprawling Campaign’.

Key to these ambitions of controlling the discourse – and hence the narrative – and thereby winning the systemic competition (without firing a shot) is Xi's request to amplify Chinese discourse power. This discourse power is characterized in the Chinese sense as "power-to-structure"³¹ and will ostensibly enable the CCP to promote China's domestic political and global governance model abroad. At the same time, discourse power will help the CCP to undermine and actively discredit alternative systems, including democracy.

Hong Kong and Taiwan have been identified as a testing ground for Chinese influence operations – ostensibly with the CCP's concerted attempts to meddle both during and prior to the Taiwan 2020 presidential election, for example. Australia and New Zealand, on the other hand, seem to be the first front for practising these grey-zone influence operations.³²

Massive media and social media campaigns with varying degrees of success could also be identified in most European countries. Themes covered a broad range extending from EU-US relations all the way to Covid-19, with the aim of quelling CCP-targeted criticism, building positive China narratives, and weakening EU-US relations.³³ An in-depth Twitter analysis in Latvia, for example, identified frames provided by Chinese official sources, such as "lucrative

partner", "global leader", "Uighurs are treated well" and "culture and history wonderland". Yet the analysis showed that the positive frames that Latvian media picked up were paired with counter-frames, such as "suppressor of democracy" and "human rights violator".³⁴

The playbook for Chinese influence operations via the media encompasses several core tactics. Firstly, media investments: between 2008 and 2018, Chinese investments in buying up shares in European media houses totalled up to 2.8 bn euros, 1% of the total Chinese investments in Europe.³⁵ Secondly, training journalists and wooing them with expensive trips. Thirdly, "borrowing a boat" by paying for inserting content not easily identifiable as paid content into quality papers. In 2018, the *Guardian* identified distinguished papers such as *Handelsblatt*, *Le Figaro*, *El País* and the *Daily Telegraph*, with the *Telegraph* having about a third of its annual budget covered by Chinese payments.³⁶ Contrary to Russian influence campaigns via media platforms, Chinese-driven articles still seem to follow Chinese demands (in the sense that they follow rules of writing that are applied within China) rather than local paradigms. Still, there are increasing efforts to "localize" narratives by using local China-friendly actors to legitimize Chinese narratives, and to employ local journalists to write opinion pieces.³⁷

31 Godehardt, 'Wie China Weltpolitik Formt'; Atlantic Council, Chinese Discourse Power.

32 In a very useful differentiation, Knoll identifies "four elements" of grey for these operations: Implausible Deniability; Goldilocks Competition; Sub-Provocative Action; and Cumulative Effect (Knoll 2021).

33 Schliebs, 'The Covid-19 "Infodemic"'; Schliebs et al., *China's Public Diplomacy Operations*; Cook, 'Welcome in a New Era of Chinese Government Disinformation'; Karāšková et al., *China's Propaganda and Disinformation Campaigns*.

34 Bērziņa Čerenkova et al., *China's Influence in the Nordic-Baltic Information Environment*.

35 RSF, 'China's Pursuit of a New Media Order'.

36 Lim & Bergin, 'Inside China's Audacious Global Propaganda Campaign'.

37 Sebok, 'Czechia: A Case Study of China's Changing Overseas Propaganda Efforts'; Sebok and Turcsányi, *China as a Narrative Challenge for Nato Member States*.

Trend 3: Economic statecraft and the setting of norms and standards

The third trend is closely entangled with the second but merits its own category as it entails a major tool employed by the CCP, the use of economic statecraft, which continues to be the prime instrument. Moreover, it increasingly extends to the use of economic and diplomatic power to change norms and standards per se, duly shaping an environment favourable to Chinese interests.

The economic dependence of companies and countries is still the main tool deployed by Beijing. On the business side, Xi Jinping's "dual circulation" / "offensive decoupling" strategy³⁸ and the latest five-year plan approved in March 2021 aim for greater Chinese autarky from abroad while increasing global dependency on China. Chinese "sharp power"³⁹ often leads to self-censorship, also and particularly in the business realm. A case in point here was the German publishing house Carlsen, which had published a children's book on Covid-19, linking the origin of the virus to China, and which was forced to withdraw the book from the market.⁴⁰

On the international development aid side, with USD 85 billion a year, the PRC spends twice as much as the United States. Accordingly, the CCP has been able to vastly expand its influence worldwide: debtors must not recognize Taiwan, must use Chinese companies and accept opaque loans that contain unusual confidentiality clauses, and other measures that permit

"the lenders to influence debtors' domestic and foreign policies".⁴¹ A 2021 AidData study concluded that 42 countries are already indebted to China by as much as 10% of their GDP. The primarily loan-driven BRI in particular has become a symbol of Chinese "debt-trap diplomacy". An estimated USD 385 billion "hidden debt" is tied to the BRI. The Sri Lankan port of Hambantota and Zambia's Kenneth Kaunda International Airport were handed over to Chinese control when the states could no longer pay the loan rates.⁴² Beijing's emphasis on bilateral relations further ameliorates its power position in asymmetrical relationships.

However, the CCP's power of economic deterrence has suffered from the relatively unsuccessful coercion campaigns against Australia and Lithuania. Beijing ignited an unprecedented trade war of sanctions against Australia in 2020 after Canberra's request for an independent investigation into the origins of Covid-19. The same happened with Lithuania, which announced its departure from the 17+1 format in 2021, and the establishment of mutual offices of representation with Taiwan.

Both attempts to coerce foreign governments into the Beijing line failed. Australia was able to offset losses by redirecting goods to other markets, with China facing one of its worst energy crises without high-quality coal from Australia.⁴³ Lithuania, for its part, continued its path with

38 *The Economist*, 'China's "dual-circulation" strategy means relying less on foreigners'.

39 'Sharp power', coined in a report by Juan Pablo Cardenal et al. in 2017 and since widely debated, is wielded by authoritarian regimes to "manipulate and co-opt culture, education systems, and media" (Cardenal et al., *Sharp Power: Rising Authoritarian Influence*).

40 Dege, 'China Gets German Children's Book About Covid Withdrawn'.

41 Gelpert, *How China Lends*.

42 Singh, 'Major Setback for China's African Safari'; Russel & Berger, 'Weaponizing the Belt and Road Initiative'; Gelpert et al., *How China Lends*; Charon and Jeangène Vilmer, *Chinese Influence Operations*.

43 Aizhu, 'China Turns to Stranded Australian Coal to Combat Power Crunch Trade'.

only minor losses due to the lack of dependency on the Chinese market. Beijing even started to threaten third-country companies that make use of Lithuanian production and products – thus far to no avail. In sum, while an increasing proclivity to dish out sanctions has been observed in the past two years, the consequences have not been in Beijing's favour, and have even hurt the Chinese economy to some extent.⁴⁴

Changing the overall framework conditions, Beijing increasingly engages in norm- and standard-setting and active norm-diffusion processes. It thereby creates different "rules of the game" that are more favourable to the CCP's interests.⁴⁵ Chinese President Xi emphasized at the 2018 CCP Central Foreign Policy Work Conference that China needs to "lead the reform of the global governance system", transforming institutions and norms in order to reflect Beijing's values and priorities.⁴⁶ As early as 2016, experts highlighted China's enhancement of normative power through its establishment of institutions like the AIIB in an effort to influence

other international institutions to adapt to Chinese norms.⁴⁷ Strategic staff placements in UN expert working groups have provided ample avenues for influence by framing – putting a certain spin on words – and replacing official parlance. Examples include replacing "democracy" throughout with "social systems", pressing for exceptions due to models "with Chinese characteristics", and changing the text in final write-ups.⁴⁸

Current key targets are international expert groups setting norms for cyber and space as well as information technology (IT). Even Beijing's initial attempt to bully acceptance of Chinese vaccines Sinopharm and Sinovac without an official acknowledgement by the European Medical Agency (EMA; EMA approval requires the passing of its official examination process) can be seen as a part of this overall ambition to internationally set Chinese standards and norms, and replace existing ones if they are not in the CCP's interests.

44 Sheftalovich and Lau, 'How Xi Jinping Lost Australia'; Walsh, 'Australia Called for a Covid-19 Probe'; Wilson, 'Australia Shows the World What Decoupling from China Looks Like'; Andrijauskas, 'Context Behind Lithuania's Review of Its Relationship with China'; Andrijauskas, *Lithuania's Decoupling from China*; Lowy Institute, 'Lowy Institute Poll 2021: Views of China'; Rajah, 'The Big Bark but Small Bite of China's Trade Coercion'.

45 Stumbaum, 'Chinese Norm Diffusion in International Relations'; Economy & Rolland, 'A "China Model?"'.

46 Kevin Rudd, 'Xi Jinping, China and the Global Order'.

47 Peng & Tok, 'The AIIB and China's Normative Power in International Financial Governance Structure'.

48 Ultes and Wientzek, 'Voting Behaviour in the UN Human Rights Council in 2021: In Relation to Germany and China'; Feltman, 'China's Expanding Influence at the United Nations'; Fung & Lam, 'Why the Increase in Chinese Staff at the United Nations Matters'; Larsen, 'Balancing China at the United Nations'.

Trend 4: Increasing cooperation between Russia and China

Increasing cooperation between Russia and China in hybrid threat operations can be observed in two ways. Firstly, there is a rapid rise in cooperation in paramilitary exercises and, in particular, in high technology and dual-use technology in line with the global development in de-globalizing the spread of disruptive technologies.⁴⁹ Secondly, there can be observed what Charon and Jeangène Vilmer call the “Russification” of Chinese influence operations, manifesting itself in three components: Beijing drawing on Moscow in various ways, differences in approach, and cooperation between both sides.⁵⁰

For the time being, the notion of a “Russian Playbook” remains disputed, with some experts referring instead to a Leninist playbook.⁵¹ However, despite information on Sino-Russian cooperation remaining limited, experts agree that “the CCP’s propaganda apparatus has been watching the tactics and impact of Russian disinformation”.⁵² Beijing has been studying Russian activities and drawing lessons for a long period of time, with the PLA explicitly endorsing the model.⁵³

There have been striking similarities and evidence of learning processes. Both actors have tested their portfolio first in their near abroad

before going global. As for China, the first indications of clearly aiming to influence another country’s policy appeared during the Taiwan local elections in 2018, then during the Hong Kong protests, and finally – going global – with the massive campaign to shape the Covid narrative. In Europe in particular, efforts were targeted at discrediting the ability of Western democracies to manage the crisis, while obfuscating reports on China as the country of origin of the virus.⁵⁴

Differences remain, however, with China using notably more human actors, while Russia tends to rely on bots and troll factories. Beijing also seems to focus more on quantity rather than localized quality, with articles following domestic / Chinese demands and principles,⁵⁵ although localization is increasing.⁵⁶ Accordingly, Beijing’s operations in this realm have thus far been less successful in comparison. Finally, evidence of cooperation is also increasing, as is apparent, for example, in the Western Balkans and Central Europe, where the interplay between pro-China and pro-Russia narratives can also be observed, and “where China has utilized the same alternative media outlets which often spread Russian narratives”.⁵⁷

49 Forrest et al., ‘China and Russia Military Cooperation Raises Prospect of New Challenge to American Power’; Weidacher Hsiung, ‘China’s Technology Cooperation with Russia’; Weitz, ‘Assessing Chinese-Russian Military Exercises’.

50 Charon and Jeangène Vilmer, *Chinese Influence Operations*.

51 Allen-Ebrahimian, ‘China Takes a Page from Russia’s Disinformation Playbook’; François, ‘Moving Beyond Fears of the ‘Russian Playbook’; Economy & Rolland, ‘A ‘China Model?’.

52 Wallis et al., *Retweeting through the Great Firewall*, p. 5.

53 Cole, ‘A Conversation About China’s Sharp Power and Taiwan’; Chen, ‘China Learning from Russia’s “Emerging Great Power”’.

54 Horton, ‘Specter of Meddling by Beijing Looms over Taiwan’s Elections’; Rogin, ‘China’s Interference in the 2018 Elections Succeeded – in Taiwan’; Jeangène Vilmer & Charon, ‘Russia as a Hurricane, China as Climate Change’.

55 Fowdy, ‘Why China Is Losing the War of Words with the West’; Karásková et al., *China’s Propaganda and Disinformation Campaigns*.

56 Sebok, ‘Czechia: A Case Study of China’.

57 Karásková et al. *China’s Propaganda and Disinformation Campaigns*, p. 7; Shopov, *Decade of Patience; The Balkan Times*, ‘The Western Balkans: Low Hanging Fruit for China?’; Karásková et al., ‘Empty Shell No More’.

Trend 5: Increasing awareness, resistance, and resilience in affected states

Since the previous China Trend Report was published in 2020, awareness among affected states and societies has been on the rise. There is a growing level of exchanges on lessons learned and best practices, as well as the introduction of counter-instruments. The fierce debate on 5G has further prompted awareness and discussion. The controversy stirred up ongoing deliberations and provided an initial insight into different perceptions and prevailing positions.

Questions on how to deal with China and hybrid threat operations have now become a mainstream element of NATO's discussion. The 2021 communiqué expresses concerns about "China's stated ambitions and assertive behaviour" presenting "systemic challenges to the rules-based international order and to areas relevant to Alliance security", while emphasizing the persistent desire to engage in "constructive dialogue".⁵⁸ The topic is part of ongoing consultations on the new Strategic Concept 2030. The European Union has designated China a "systemic rival"⁵⁹ and called Beijing out as a source of (online) disinformation, particularly in reference to Covid-19 and vaccines.⁶⁰ The European Parliament has set out a vision for a new EU strategy on China, calling for more resources to monitor and tackle Chinese disinformation, and for excluding companies from 5G/6G that do not fulfil

'security standards'.⁶¹ Among other agencies, the European Centre of Excellence for Countering Hybrid Threats (Hybrid CoE in Helsinki) and the NATO Strategic Communications Centre of Excellence (NATO StratCom COE in Riga) have further spurred related analysis and debate.⁶² In addition to the fora and instruments launched at the NATO / EU level, individual member states of both entities have started frequent, bi- and pluri-lateral exchange fora.

In addition to concerns being expressed by the United States and other like-minded countries, European countries are also feeling China's increasing security-related footprint, which is affecting European interests at home and abroad. With 40% of EU trade passing through the South China Sea, China's military build-up in these waters is viewed with growing consternation.

Information on China's transformation of assets into dual-use resources is an additional cause for concern. More than 10% of all European port capacities are under Chinese control. This number is constantly increasing, as evidenced, for example, by COSCO's recent acquisition of a 35% stake in the Container Terminal Tollerort (CTT) in the Port of Hamburg.⁶³ Germany's only deep-sea port – JadeWeserPort with its recent substantial Chinese investments –

58 NATO, 'Brussels Summit Communiqué'.

59 European Commission, *EU-China – a Strategic Outlook*.

60 EEAS, *Short Assessment of Narratives and Disinformation around the Covid-19 Pandemic*; Emmott, 'Russia, China Sow Disinformation to Undermine Trust in Western Vaccines'; Euronews, 'EU Slams Russia and China for Western Vaccines Disinformation Campaign'.

61 European Parliament, 'Parliament Sets out Its Vision for a New EU Strategy on China'.

62 See, among others: Aukia, *China as a Hybrid Influencer*; Giannopoulos et al., *The Landscape of Hybrid Threats*; Hybrid CoE, *Trends in China's Power Politics*; Bērziņa Čerenkova et al., *China's Influence in the Nordic-Baltic*; Sebok and Turcsányi, *China as a Narrative Challenge*.

63 The Maritime Executive, 'Cosco Buys Stake in Hamburg Container Terminal for European Hub'.

is located right next to the Wilhelmshaven naval base.⁶⁴

Even in more conventional security terms, the potential threat is increasing, with the Chinese government setting up new missile depots in western China and testing hypersonic weapons.⁶⁵

64 Nicolai, 'Deutschlands Problemhafen'; Hutchings, 'Chinese Maritime Expansion'; Wang, 'The Realities of China's Overseas Port Push'.

65 Duster, 'Top Military Leader Says China's Hypersonic Missile Test "Went around the World"'; Erickson and Collins, 'A Dangerous Decade of Chinese Power Is Here'; Moore, 'China Says New Hypersonic Missile a Blow to US "Strategic Superiority"':

Conclusion and outlook

Control will tighten and social re-engineering will continue to be fortified within China. Correspondingly, there will be a further increase in hybrid threat operations in foreign policy with a whole-of-society approach. Operations will strive to create an environment ever-more conducive to the CCP's interests, and support the CCP's quest to control the narrative on China and China-related issues at home and abroad.

The statement in the 2020 China Trend Report about "hybrid threats as force multipliers and coercion tactics to compensate for other under-performing policies and strategies, as well as the increasing difficulties that China has been facing" will continue to apply to the CCP. In the same vein, "the use of ambiguous and ubiquitous modes of operation by China to create confusion to obfuscate meaningful responses will continue to structure the country's pattern of projection of power".⁶⁶

With heightened awareness by like-minded states that the very foundation of the liberal

rules-based order is at stake, there will also be increasing resilience and resistance. This might in turn lead to high intensity in all China-related matters, albeit still short of war.

Key for Western stakeholders will be a better understanding of the ideology, structure, and internal dynamics that are driving Chinese foreign policy now much more than before. A thorough understanding of drivers, overarching objectives and the roles of actors will be essential in order to develop joint actions and concerted approaches. These are important building blocks in achieving an acceptable modus operandi with global power China. Collaboration with China will be inevitable to effectively tackle global challenges, from climate change all the way to developing a sustainable green economy. Coordinated action and exchanges among like-minded partners will be imperative in order to defend the rules-based international order, and particularly to protect the heart of liberal democracies: safe, diverse and open societies.

⁶⁶ Hybrid CoE, *Trends in China's Power Politics*, p. 27

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