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MILITARY AND SECURITY DEVELOPMENTS INVOLVING THE PEOPLE'S REPUBLIC OF CHINA

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Military and Security Developments Involving the People's Republic of China

A Report to Congress
Pursuant to the National Defense Authorization Act for
Fiscal Year 2000, as amended

Section 1202 of the National Defense Authorization Act for Fiscal Year 2000, Public Law 106-65, as amended, provides that the Secretary of Defense shall submit a report "in both classified and unclassified form, on military and security developments involving the People's Republic of China. The report shall address the current and probable future course of military-technological development of the People's Liberation Army and the tenets and probable development of Chinese security strategy and military strategy, and of the military organizations and operational concepts supporting such development over the next 20 years. The report shall also address United States-China engagement and cooperation on security matters during the period covered by the report, including through United States-China military-to-military contacts, and the United States strategy for such engagement and cooperation in the future."

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PREFACE

The 2022 *National Security Strategy* states that the People's Republic of China (PRC) is the only competitor to the United States with the intent and, increasingly, the capacity to reshape the international order. As a result, the 2022 *National Defense Strategy* identifies the PRC as the "pacing challenge" for the Department of Defense (DoD). As the PRC seeks to achieve "national rejuvenation" by its centenary in 2049, Chinese Communist Party (CCP) leaders view a modern, capable, and "world-class" military as essential to achieving its revisionist aims and overcoming what Beijing sees as an increasingly turbulent international environment.

The DoD annual report on *Military and Security Developments Involving the People's Republic of China* charts the course of the PRC's national, economic, and military strategy and offers insight on the People's Liberation Army's (PLA) strategy, current capabilities, and activities as well as its future modernization goals.

In 2023, the PRC continued its efforts to form the PLA into an increasingly capable instrument of national power. Throughout the year, the PLA adopted more coercive actions in the Indo-Pacific region while accelerating its development of capabilities and concepts to strengthen the PRC's ability to "fight and win wars" against a "strong enemy," counter an intervention by a third party in a conflict along the PRC's periphery, and project power globally. Working-level and senior-level military-to-military channels of communication resumed following President Biden and PRC leader Xi Jinping meeting in November 2023.

This report illustrates the importance of meeting the pacing challenge presented by the PRC's increasingly capable military.

Report Scope: This report covers security and military developments involving the PRC through early 2024.

EXECUTIVE SUMMARY

UNDERSTANDING THE PRC'S STRATEGY

- **The PRC's National Strategy.** The PRC's longstanding national strategy is to achieve "the great rejuvenation of the Chinese nation" by 2049. This strategy determinedly pursues political, social, economic, technological, and military development to increase the PRC's national power and revise the international order in support of the PRC's system of governance and national interests.

- **The PRC's Foreign Policy.** The PRC's stated foreign policy seeks to reshape the international order into what it calls a "community of common destiny" to support its strategy to realize "rejuvenation." PRC leaders claim their power to shape world events continues to grow, presenting "new strategic opportunities" to create an environment favorable for PRC interests and national rejuvenation.

- **The PRC's Economic Policy.** The PRC acknowledges that internal and external challenges complicated its economic recovery and growth in 2023. For 2024, the PRC plans to leverage perceived favorable factors in the PRC's long-term growth trajectory while mitigating risks to economic stability. The PRC's ongoing military modernization objectives are commensurate with and part of its broader national development aspirations to invest heavily in technological self-sufficiency and concentrate on advanced manufacturing.

- **The PRC's Defense Policy and Military Strategy.** In 2023, the PRC's stated defense policy remained oriented toward advancing its sovereignty, security, and development interests while emphasizing a greater global role for itself. Beijing has demonstrated an increasing willingness to use military coercion and inducements to achieve these aims.

- **The PRC's Military Leadership.** The Central Military Commission (CMC), the PRC's top military decision-making body, consists of a civilian chair (Xi Jinping), two vice chairs, the chiefs of the Joint Staff and Political Work Departments, and the head of the Discipline Inspection Commission. For most of 2023, Li Shangfu served as the PRC's minster of National Defense before his removal in October 2023 for corruption-related offenses. In December 2023, President Xi Jinping selected Adm. Dong Jun as the PRC's new Minister of National Defense.

PLA FORCES AND CAPABILITIES

- **The PLA's Modernization and Reform.** The PLA has sought to modernize its capabilities and improve its proficiencies across all warfare domains to become a joint force capable of the full range of land, air, and maritime as well as nuclear, space, counterspace, electronic warfare, and cyberspace operations. Despite its progress, the force still has significant deficiencies including in commander proficiency, long-distance logistics, and urban warfare. In 2023, the PLA continued to adjust its military structures, field modern indigenous systems, build readiness, and strengthen its competency to conduct joint operations.

- **PLA Army (PLAA).** The PLAA continues its decades-long effort to modernize equipment and focus on combined arms and joint training to become a world-class military by 2049. The PLAA continued to demonstrate long-range joint fires capabilities during the April 2023 JOINT SWORD exercise.

- **PLA Navy (PLAN).** Numerically, the PRC has the largest navy in the world, with a battle force of over 370 ships and submarines, including more than 140 major surface combatants. The PLAN is largely composed of modern multi-mission ships and submarines. In 2023, the PLAN continued to grow its ability to perform missions beyond the First Island Chain (FIC) by conducting the first extended area deployment of its new YUSHEN-class amphibious assault ship and three deployments with CV-17 *Shandong* to the Philippine Sea, a record number for any PLAN carrier in a calendar year.

- **PLA Air Force (PLAAF).** The PLAAF is modernizing and indigenizing its aircraft and unmanned aerial systems rapidly, matching U.S. standards. In 2023, the PLA transferred significant portions of PLAN shore-based, fixed-wing combat aviation units, facilities, air defense, and radar units to the PLAAF. Given time, this shift will probably enable better command and control over the PRC's integrated air defense systems as well as the network of ground-based air domain awareness radars supporting the PRC's national integrated air defense system network.

- **PLA Rocket Force (PLARF).** The PLARF is advancing its long-term modernization plans to enhance its "strategic deterrence" capabilities. The PRC is developing new intercontinental ballistic missiles (ICBMs) that will significantly improve its nuclear-capable missile forces and will require increased nuclear warhead production. The PRC may also be exploring development of conventionally-armed intercontinental range missile systems. If developed and fielded, such capabilities would enable the PRC to threaten conventional strikes against targets in the continental United States, Hawaii, and Alaska.

- **The Former Strategic Support Force (SSF).** On 19 April 2024, Beijing announced the dissolution of the SSF, and the alignment of its subordinate forces—Aerospace Force (ASF) and Cyberspace Force (CSF)—directly under the CMC. Beijing established a new Information Support Force (ISF), under the CMC, to coordinate the management of military's networks and communications systems. The updated PLA organizational structure features four theater-

grade services—the PLAA, PLAN, PLAAF, and PLARF—and four deputy-theater-grade forces or service arms: the ASF, CSF, ISF, and the Joint Logistic Support Force (JLSF).

- **The Joint Logistic Support Force.** The JLSF is concentrating its efforts on improving joint strategic and campaign-level logistic efficiencies through training and integrating civilian products and services. The JLSF supports multimodal transportation methods to facilitate the movement of PLA forces and equipment for training. During wartime or mobilization, the JLSF probably will rely on its military representative offices and dispatch centers to route military traffic.

- **PLA Reserves, Paramilitary, and Militia Forces.** Interoperability and integration between the PLA, its reserve components, and the PRC's paramilitary forces continue to grow in scale and sophistication, including the coordination between the PLAN, the China Coast Guard (CCG), and the China Maritime Militia (CMM). The PRC primarily relies on its CCG and CMM for maritime coercion while selectively using the PLAN to provide overwatch to deter rival claimants and quickly respond with force, if necessary. The People's Armed Police (PAP) is an additional paramilitary component of the PRC's armed forces. Its primary missions include internal security, maritime security, and augmentation to the PLA during conflict.

- **Special Operations Forces (SOF).** Despite unilateral and multilateral training, all PRC SOF units lack real-world combat experience. PRC SOF do not have a national-level special operations command to oversee all SOF activities. Despite an emphasis on joint training, theater commanders have no authority over PAP units, making it difficult to incorporate PAP SOF into PLA training exercises.

- **PLA Capabilities in Development.** The PLA remains focused on developing capabilities to provide options for the PRC to dissuade, deter, or, if ordered, defeat third-party intervention in the Indo-Pacific region. The PLA continues developing the capabilities to conduct military operations deeper into the Indo-Pacific region and globally. The PLA has undertaken important structural reforms and introduced new military doctrine to strengthen joint operations and is testing joint capabilities in and beyond the FIC.

- **Joint Capabilities for Power Projection.** The PLA continues to increase its military capabilities to achieve the PRC's regional and global security objectives beyond its immediate periphery. The PLA has primarily emphasized power projection capabilities in the maritime domain while its joint operational capabilities beyond the FIC remain limited. Improvements in PLA air and naval systems enable PLA forces to operate further from the PRC for longer.

- **Advancements Toward an Informatized and Intelligentized Military.** The PLA considers information operations (IO) as a means of achieving information superiority early in a conflict, which it considers a critical requirement for the success of any military campaign, and continues to expand the scope and frequency of IO in military exercises. The PRC presents a significant, persistent cyber-enabled espionage and attack threat to an adversary's military and critical infrastructure systems. The PLA is pursuing next-generation combat capabilities based on its vision of future conflict, which it calls "intelligentized warfare," defined by the expanded

use of AI, quantum computing, big data, and other advanced technologies at every level of warfare.

- **Nuclear Capabilities.** Over the next decade, the PRC probably will continue to modernize, diversify, and expand its nuclear forces rapidly. The PLA seeks a larger and more diverse nuclear force, comprised of systems ranging from low-yield precision strike missiles to ICBMs with multi-megaton yields to provide it multiple options on the escalation ladder. In 2023, Beijing continued its rapid nuclear expansion. DoD estimates the PRC has surpassed 600 operational nuclear warheads in its stockpile as of mid-2024 and will have over 1,000 operational nuclear warheads by 2030, much of which will be deployed at higher readiness levels. The PRC will continue growing its force through at least 2035.

OPERATIONAL STRUCTURE AND ACTIVITIES ON THE PRC'S PERIPHERY

- **Theater Commands.** The PRC continues to refine military reforms associated with the establishment of the Eastern, Southern, Western, Northern, and Central Theater Commands, which are organized based on the PRC's revisionist ambitions and perception of peripheral threats. Under the direction of the CMC, each Theater Command has operational authority over conventional forces within the theater.
  - The Eastern Theater Command (ETC) is oriented toward Taiwan and the East China Sea and would likely oversee a Taiwan campaign. The ETC executed exercise JOINT SWORD, aimed at pressure Taiwan in April 2023.
  - The Southern Theater Command (STC) is oriented toward the South China Sea (SCS) and Southeast Asia border security. It responds to U.S. freedom of navigation operations in the SCS and can assume command, as needed, over all CCG and CMM ships enforcing the PRC's claimed sovereignty and supporting PLA operations. In 2023, STC units conducted multiple live-fire drills and amphibious training events near PRC-occupied features in the SCS and led live-fire drills, including the deployment of howitzers and counter-battery radars at the PRC-Burma border.
  - The Western Theater Command (WTC) is oriented toward India and counterterrorism missions along the PRC's Central Asia borders. The WTC focuses on Xinjiang and Tibet Autonomous Regions, where the CCP perceives a high threat of what it defines as the "three evils" of "separatism, terrorism, and extremism."
  - The Northern Theater Command (NTC) is oriented toward the Korean Peninsula and Russian border security.
  - The Central Theater Command's (CTC's) mission is the defense of Beijing while providing support to other theater commands.
- **Developments in the Security Situation in the Taiwan Strait.** In 2023, the PRC amplified diplomatic, political, and military pressure against Taiwan. Throughout 2023, Beijing

continued to erode longstanding norms in and around Taiwan by employing a range of pressure tactics against Taiwan: maintaining a naval presence around Taiwan, increasing crossings into Taiwan's self-declared centerline and air defense identification zone (ADIZ), and conducting highly publicized major military exercises near Taiwan.

- **Developments in Taiwan's Ability to Deter the Mainland.** Geopolitical events in 2023 continued to accelerate Taiwan's development of asymmetric concepts and capabilities to counter the PRC's improving capabilities. Taiwan seeks to balance these asymmetric capabilities with conventional ones useful for defending against PRC gray-zone operations in and around its airspace and waters. In 2023, Taiwan continued to improve defensive resilience through a whole-of-society approach.

- **Developments in the Security Situation in the South China Sea.** Throughout 2023, tensions between the PRC and the Philippines were notably higher, with the PRC maritime forces ramming and boarding Philippine vessels en route to resupply the Second Thomas Shoal. The PRC has deployed PLAN, CCG, CMM, and civilian ships to advance its illegal maritime claims, such as around the Second Thomas Shoal, Scarborough Reef, Sabina Shoal, and Sandy Cay/Thitu Island, as well as in response to oil and gas exploration operations by rival claimants in the PRC's unlawful dashed-line claim.

- **PLA Coercive and Risky Operational Behavior.** Since late 2023, the PLA has reduced the number of coercive and risky air intercepts of U.S. platforms compared to the previous two years, when the PLA engaged in notably increased aggressive activity, particularly in the East and South China Seas. However, the PLA continues to conduct unsafe maneuvers in the vicinity of allied forces operating in the region.

THE PLA'S GROWING GLOBAL PRESENCE

- **The PLA's Evolving Mission and Tasks.** PLA concepts and capabilities focus on projecting power far from China's shores. The PLAN's evolving focus from "offshore defense" to "open seas protection" and the PLAAF's interest in becoming a "strategic" air force reflect the PLA's interest in conducting operations beyond the PRC and its immediate periphery. The PLA has embraced its concept of non-war military activities (NWMA) as an effective way to secure the PRC's global interests with military force while gaining valuable operational experience.

- **PLA Overseas Military Activities.** Beijing implements its global counterterrorism strategy to develop the PLA's operational experience, secure greater access to overseas theaters, and prevent terrorist attacks in China and against PRC citizens and economic projects abroad. Citing its counterterrorism mission, since 2008, the PLA has dispatched more than 40 naval escort task forces (NETFs) to the Gulf of Aden, granting PLAN sailors important experience in overseas operations. In 2017, the PLA established an overseas base in Djibouti. The PRC is the largest contributor of peacekeepers among the five UN Security Council permanent members, having deployed about 50,000 personnel over the last 31 years. The PRC uses international outreach to garner the assistance of partner governments, routinely lobbies foreign partners to extradite alleged Uyghur extremists, and seeks public endorsement of its counterterrorism efforts in multilateral forums.

- **Military Cooperation.** The PRC uses bilateral and multilateral exercises to normalize its overseas presence and deepen defense ties. Beginning in 2014, the PRC has markedly increased participation in bilateral and multilateral exercises. Since then, Beijing has held recurring exercises, including the FALCON STRIKE air exercise with Thailand (2015), MARITIME SECURITY BELT naval exercise with Russia and Iran (2019), and BLUE SWORD with Saudi Arabia (2019). The PRC has expanded combined exercises with Russia, especially since 2018, when Beijing first participated in Russia's VOSTOK capstone exercise.

- **Overseas Basing and Access.** The PRC is seeking to expand its overseas logistics and basing infrastructure to allow the PLA to project and sustain military power at greater distances. A global PLA logistics network could disrupt U.S. military operations as the PRC's global military objectives evolve. Beyond the PLA support base in Djibouti, the PRC is very likely already considering and planning for additional military logistics facilities to support naval, air, and ground forces projection.

RESOURCES AND TECHNOLOGY FOR FORCE MODERNIZATION

- **PRC Defense Spending.** A survey of multiple models of the PRC's defense budget estimates that Beijing spends 40% to 90% more than it announces in its public defense budget, which equates to approximately $330 billion–$450 billion in total defense spending for 2024. The consensus among experts is that the PRC's publicly announced defense spending figure does not contain the entirety of PRC investment in its defense, so alternative approaches are used to assess the total value of this spending.

- **Developments in Defense Industry.** The PRC's hypersonic missile technologies have greatly advanced during the past 20 years. Many PRC missile programs are comparable to other international top-tier producers. The PRC is the world's top ship-producing nation by tonnage and is capable of producing a wide range of naval combatants, gas turbine and diesel engines, and shipboard weapons and electronic systems, making it nearly self-sufficient for all shipbuilding needs.

- **Arms Transfers.** The PRC uses foreign suppliers to overcome limitations in its domestic production capabilities, particularly for helicopters and aircraft engines. As its aerospace industry improves over the next decade, the PRC very likely will decrease its foreign acquisitions to maintain only an import relationship with foreign suppliers positioned to quickly fill niche gaps in the PRC's inventory. As of 2023, the PRC is the fourth-largest arms supplier in the world and sells nearly every category of conventional military equipment including unmanned aerial vehicles, man-portable air-defense systems (MANPADS), submarines, naval surface vessels, surface-to-air missile systems, and fighter aircraft to customers worldwide.

U.S.-PRC MILITARY-TO-MILITARY CONTACTS AND EXCHANGES

- In 2023, the PLA largely denied, cancelled, and ignored recurring bilateral engagements and DoD requests for communication until weeks before President Biden and PRC leader Xi Jinping met in November 2023. Following the Woodside Summit, where the two leaders

agreed to resume military-to-military communication at all levels, DoD and the PLA conducted several exchanges and working groups at the end of 2023 and through the end of 2024, including senior leader discussions, defense policy talks, operational safety talks, and calls between theater commanders.

- DoD remains committed to maintaining open lines of communication with the PRC to ensure competition does not veer into conflict. DoD objectives in maintaining military-to-military channels are to help prevent crisis, reduce strategic and operational risk, and clarify misperceptions.

SPECIAL TOPICS

- **Impacts of Corruption in the PLA.** In 2023, a new wave of corruption-related investigations and removals of senior leaders may have disrupted the PLA's progress toward stated 2027 modernization goals. Between July and December 2023, at least 15 high-ranking military officers and defense industry executives were removed from their posts. Several leaders investigated or removed for corruption oversaw equipment development projects related to modernizing China's ground-based nuclear and conventional missiles. The most prominent removal was that of PRC Minister of National Defense Li Shangfu in late October. Li led the CMC Equipment Development Department from 2017 to 2022, where he would have signed off on all PLA weapons acquisitions.

- **Political Training in the PLA.** The political work system and the political training featured within it have been central parts of the PLA since its founding as the party army of the CCP. A key feature of Xi Jinping's leadership has been the focus on strengthening and revitalizing political work and training in the PLA to "fight and win" wars and bolster political control over the military. Efforts to revitalize political work derive from Xi's concerns regarding political loyalty and corruption in the armed forces.

- **PRC Views of Comprehensive National Power.** For Beijing, "comprehensive national power" (CNP) represents a country's overall measure of power actualized across multiple domains that it wields in the international system. More than just military strength, it encompasses a country's full suite of economic, science and technology, diplomatic, political, cultural, natural, people, and other resources as well as ideational ethos and international influence. The term dates to at least the 1960s but, in the 1980s, as the PRC developed Deng Xiaoping Theory, it adopted the use of CNP as a measurement of China's overall development. The term CNP remains broadly used by PRC officials, strategists, and theorists. CNP is used as an internal measurement of development and a calibrated reference for competition between inimical governance systems—China's socialist system and the West's capitalist system. CNP is inexorably tied to military competition as, for the PRC, confrontation on the battlefield represents not just a contest between two countries' military systems but a systemic confrontation based on the overall strength of each country.

CHAPTER ONE: UNDERSTANDING THE PRC'S STRATEGY

Understanding the tenets of the People's Republic of China's (PRC's) national strategy is essential to understanding the drivers of the PRC's security and military strategy. This understanding, in turn, offers insights on the current and future course of People's Liberation Army (PLA) reform and modernization efforts in terms of its strength, technological advances, organization, and operational concepts—all of which could offer PRC leaders expanded military options to support national goals.

As PRC leader, Xi Jinping concurrently serves as the Chinese Communist Party (CCP) General Secretary, Central Military Commission (CMC) Chairman, and President of the PRC. The title used for Xi varies depending on whether he is acting in his capacity as party leader, military leader, or head of state.

THE PRC'S NATIONAL STRATEGY

Key Takeaways

- The PRC's national strategy is to achieve "the great rejuvenation of the Chinese nation," "China Dream," and "Chinese modernization" by 2049. The strategy determinedly pursues political, social, economic, technological, and military development to increase the PRC's national power and revise the international order to support the PRC's system of governance and national interests.
- The PRC increasingly pushed the narrative that its preferred revisions to the international order are in other countries' interests as well.
- The PRC increasingly views the United States as deploying a whole-of-government effort to contain and suppress the PRC's rise, presenting obstacles to its national strategy.
- PRC leaders are expanding domestic efforts to develop new capabilities for advantages in competition and maintain independent supply chains and strategic stockpiles in the face of Western efforts to derisk supply chains.

The PRC characterizes its view of strategic competition in terms of a rivalry among powerful nation states as well as a clash of opposing ideological systems. PRC leaders believe that structural changes in the international system and an increasingly confrontational United States are the root causes of intensifying strategic competition between the PRC and the United States.

The PRC's strategy entails deliberate and determined efforts to amass, improve, and harness internal and external elements of national power that will place the PRC in a "leading position" in an enduring competition between systems.

The CCP characterizes its strategy to achieve political, social, and economic modernity as a grand national endeavor, sweeping in scope and far-reaching in how it will transform the PRC and, in turn, the world. The CCP defines this as "the great rejuvenation of the Chinese nation" or national rejuvenation as a state in which the PRC is "prosperous, strong, democratic, culturally advanced, harmonious, and beautiful." The PRC's strategy entails efforts to amplify internal and external elements of national power that will "raise China's international influence, appeal, and power to shape events to a new level." The PRC's strategy entails a long-term planning process to attain national rejuvenation that sets objectives, priorities, and milestones across all aspects of governance and policy areas, including economics, political affairs, legal systems, public order, national security, diplomacy, defense, education, science and technology (S&T), culture, and the environment. The objective of "national rejuvenation" or "Chinese modernization" is broad enough to justify almost any policy put forth by the CCP.

CCP officials have described achieving the unification of PRC and Taiwan as "a natural requirement" for national rejuvenation.

The PRC pursues its efforts to generate greater national power by defending and advancing its sovereignty, security, and developmental interests. Consequently, the PRC's national ambitions and statecraft rest on the foundation of the CCP-dominated political ideology of enhancing "Socialism with Chinese Characteristics," which the CCP views as the only path that will lead to the rejuvenation of the Chinese nation. The objective of this CCP-led strategy is perhaps best stated in what the CCP calls its "basic line," a single sentence in the CCP's constitution that serves as the mission of the CCP and the cornerstone for its policymaking. Last amended at the 20th Party Congress in 2022, it states:

> *"The basic line of the Communist Party of China in the primary stage of socialism is to lead all the people of China together in a self-reliant and pioneering effort, making economic development the central task, upholding the Four Cardinal Principles, and remaining committed to reform and opening up, so as to see China becomes a great modern socialist country that is prosperous, strong, democratic, culturally advanced, harmonious, and beautiful."*

The 20th Party Congress, held in 2022, incorporated new developments since 2017 in "Xi Jinping Thought on Socialism with Chinese Characteristics for a New Era," after the term was adopted into the CCP's constitution. The inclusion of Xi Jinping's namesake ideology into the CCP constitution was hailed as a "guide to action for the entire Party and all the Chinese people to strive for the great rejuvenation of the Chinese nation." The 2022 changes to the CCP constitution included an obligation of party members to "uphold Xi Jinping's core position on the Party Central Committee and within the party" as a whole while "upholding the authority and centralized and unified leadership of the Party Central Committee."

Since the 20th Party Congress, the CCP has continued to stress the need for strengthening the PRC's capacity to secure its overseas interests, including improving its control over grain, energy and other resources, and key industrial and supply chains. The PRC relies heavily on imported oil. Food security has been elevated to a top national security priority by the CCP in recent years due to climate shocks, trade disruptions, uncertain global markets, and unsecure lines of transportation. The Party Congress report stressed the CCP's need to prevent digital penetration, sabotage, subversion, and separatism activities from external actors.

Throughout 2023, PRC leadership conceded that the COVID-19 pandemic posed challenges for the PRC's diplomatic, cultural, and economic influence abroad. PRC leadership took diplomatic measures to manage increased global concern about PRC rhetorical and diplomatic alignment with Russia before, immediately following, and during Russia's war against Ukraine as well as concern for the PRC's growing assertive and coercive economic and military actions. PRC leaders continue to believe that global trends, especially the perceived U.S. decline, are generally conducive to their long-term interests and, at the close of 2023, saw the "new period of turbulence and transformation" as "posing new strategic opportunities" in China's development.

As PRC leadership views a divided China as a weak China, they argue that "full reunification"—including the resolution of the "Taiwan question" by 2049 and solidifying the PRC's "overall jurisdiction" over Hong Kong—is one of the fundamental conditions of national rejuvenation. Beijing believes that the PRC must field a world-class military by 2049 that can "fight and win" and "resolutely safeguard" the country's sovereignty, security, and development interests. In support of this goal, the National People's Congress passed revisions to the PRC's National Defense Law in December 2020 to broaden the legal justification for PLA mobilization, including defense of the PRC's "development interests." The codification of this language in PRC law is intended to add legitimacy to the use of military force to protect overseas interests.

PRC leaders claim national rejuvenation requires the PRC to "take an active part in leading the reform of the global governance system" since many rules and norms were established, in the PRC's view, during a time of PRC weakness and without the PRC's consultation and input. The Party views aspects of the prevailing international rules-based system as constraining the PRC's strategic ambitions and incompatible with its sovereignty, security, political preferences, and development interests. To PRC leaders, revisions are necessary to accommodate the PRC's development and should reflect the CCP's preferred transformation in the distribution of power to forge an external environment more favorable to the PRC's political governance system and national interests. Advancing this goal has been more than a decade-long effort of Xi's since the 18th Party Congress, with many projects, such as the Belt and Road Initiative (BRI), undertaken partly in support of it.

Key Objectives and Milestones. For decades, the PRC's leaders have framed their pursuit of modernity and power as advancing the PRC along a specific trajectory, with the PRC's centenary in 2049 serving as the target for achieving national rejuvenation and becoming a "great modern socialist country." From the CCP leadership's perspective, the PRC is a developing nation that must transition into a "fully developed and highly advanced" socialist society. This trajectory involves the CCP leadership shepherding the PRC through stages of gradual but systematic modernization and development. The CCP demarcates the stages of the PRC's strategy with milestones accompanied by objectives and priorities set by the CCP's long-term planning processes.

At the 19th Party Congress in 2017, Xi laid out the PRC's strategy in the "New Era" as a broad plan to achieve national rejuvenation with a timeline linked to two symbolically important centenary milestones reached in 2021 (the CCP's centenary) and 2049 (the PRC's centenary). To bridge the lengthy gap between the two anniversaries, Xi added interim national objectives for 2035 and laid out a broad two-stage modernization plan to reach 2049. Further demonstrating the

CCP's confidence in the PRC's progress, Xi's objectives for 2035 moved up certain mid-century targets set by the CCP going back to 1987.

At his speech marking the 100th anniversary of the CCP on July 1, 2021, Xi declared that the PRC had "realized the first centenary goal of building a moderately prosperous society in all respects," by eliminating extreme poverty. Beyond 2021, the PRC will use the "moderately prosperous society" as the basis for Xi's "two-stage" plan to achieve national rejuvenation by the PRC's centenary in 2049. In the first stage from 2021 to 2035, the CCP aims for the PRC to "basically" meet its initial thresholds for becoming a "great modern socialist country." In this stage, the PRC will likely continue to prioritize economic development as "the central task" but, rather than rapid economic growth, it will seek to address its uneven economic development and inequalities that Beijing recognized as the new "principal contradiction" in PRC society in the "New Era." By 2035, the PRC seeks to increase self-reliance through enhancing its economic and technological strength, including "basically" completing its military modernization by becoming a "global leader in innovation" and enhancing self-sufficiency in key areas like food supply. The PRC intends to significantly strengthen its cultural "soft power" and improve its domestic rule of law and governance systems.

In the second stage from 2035 to 2049, the PRC aims to attain national rejuvenation and Chinese modernization, realizing an international status that Xi describes as a "global leader in terms of comprehensive national strength and international influence." A renewed PRC will have attained—among the CCP's many goals—its objectives to field a world-class military and assume a leading position in an international order revised in line with the PRC's overall foreign policy goal to establish what it refers to as a "community of common destiny" or, the PRC's preferred official English translation, "community with a shared future for mankind."

The PRC's Core Interests. The PRC considers "core interests" as issues so central to its national rejuvenation that the official position on them is not subject to negotiation or compromise. The PRC began using the term in 2003, initially in reference to sovereignty issues regarding Taiwan and later Tibet and Xinjiang. In 2009, the senior PRC official for foreign affairs publicly defined the elements of core interests: 1) preserving the PRC's political system, 2) defending the PRC's sovereignty and territorial claims, and 3) promoting the PRC's economic development.

The list of core interests has grown over the last decade with President Xi increasingly using the terms of a national security law passed in 2015 to extend the formal status of "core interest" to territorial disputes in the South China Sea (SCS), the Senkaku Islands, and the northeastern Indian state of Arunachal Pradesh. Other sources have begun listing PRC interests in new domains—space, cyber, and electro-magnetic—which, in turn, must be contested. The increasing number of issues being defined as "core interests" carries the risk of more potential sources of conflict in PRC-U.S. relations or between the PRC and neighboring states.

Origins of PRC National Rejuvenation. Understanding the origins of the PRC's national rejuvenation concept is crucial to understanding how the PRC will likely shape and pursue this strategic objective. PRC leaders have consistently framed their efforts as seeking to "restore" China to a preeminent place in the world after enduring what the Party characterizes as China's "century of humiliation" beginning in the 19th century as the Qing Dynasty began to disintegrate and lasting until the founding of the PRC in 1949. The threads of national renewal can be traced to China's reformers and nationalist revolutionary leaders in the late Qing Dynasty and emerged

as a common nationalist theme in the fractured politics of China's Republican Era. Although the CCP's exact articulation of this goal as "the great rejuvenation of the Chinese nation" first emerged in the late 1980s, the CCP has championed the cause of rebuilding China since the 1920s. Xi describes the "great rejuvenation of the Chinese nation" as a "strategy" for "achieving lasting greatness for the Chinese nation."

The CCP's narrative of national rejuvenation speaks to the deep impressions from an era defined by the disintegration of China's polity, repeated violations of China's sovereignty by foreign powers, and the prolonged absence of physical and economic security for many Chinese people. For a country that claims a history stretching back thousands of years—much of it as one of the most powerful and advanced civilization in the world—nationalist appeals to restore China's greatness are deeply rooted. This resonance is crucial to understanding why the CCP portrays the PRC's rejuvenation as a nationalist project that the CCP "shoulders" for the country. The CCP's leaders frame "Socialism with Chinese Characteristics for the New Era" and the CCP as indispensable to the PRC overcoming its historical circumstances and attaining national rejuvenation.

The CCP claims that to perform its decisive role in guiding the PRC's development into a "great modern socialist country," it must ensure that the country advances in line with "the Four Cardinal Principles." First stated by Deng Xiaoping and later written into the CCP constitution, these principles mandate the CCP "to keep to the path of socialism, to uphold the people's democratic dictatorship, to uphold the leadership of the CCP, and to uphold Marxism-Leninism and Mao Zedong Thought." The Four Cardinal Principles are the basis for political and governance reforms pursued by the CCP and the outer boundaries of its efforts to "reform" and "open up" the country.

In addition to cultivating ideological discipline and fighting corruption in the CCP, Xi has sought to advance the PRC's strategy by strengthening the CCP's primacy across the PRC's governance systems and making the CCP more effective at managing the PRC's political, economic, and social problems. Xi's emphasis on building the CCP's institutional capacity and promoting internal unity—which he views as the means for the CCP to perform its strategic role—has become a prominent feature of his tenure. Xi has increased his authority in the CCP to levels not seen since the start of the reform era after the death of Mao. He took the unprecedented step of setting himself up for a third term as leader after presidential term limits were removed in 2018 and oversaw his status as the "core position of the Party Central Committee and the core position of the whole party" written into the CCP constitution at the 2022 20th Party Congress.

PRC leaders believe that structural changes in the international system and an increasingly confrontational United States are the root causes of intensifying strategic competition between the PRC and the United States. Throughout the post-Mao reform era and particularly after the end of the Cold War, the CCP's leaders recognized their socialist system was—and would remain over the long term—an underlying source of tension with the West. Given the CCP's ambitions to "restore" the PRC's place in the world and their assessment of the PRC's relative weakness in relation to rival states, CCP leaders recognized the PRC's growing strength could threaten to aggravate tensions with others without careful management. Deng Xiaoping's reputed approach to this dilemma, as attributed by other CCP leaders, was for the PRC to "hide our capacities and bide our time, be good at maintaining a low profile; and never claim leadership." The CCP under

Xi's leadership, despite some internal dissent, no longer follows this approach and, instead, seeks to bolster the PRC's international profile through various tools of its national power.

Over time, the PRC has characterized strategic competition in terms of a rivalry among powerful nation states, most importantly the United States, as well as a clash of opposing ideological systems. Speaking to the CCP Central Committee in 2013, Xi remarked that the CCP needed to "appreciate" that "developed Western nations" would continue to possess "real, long-term advantages" over the PRC in the economic, technological, and military domains. Xi argued that the PRC would need to "prepare for a long period of cooperation and of conflict between these two social systems in each of these domains."

The PRC's Views on Sovereignty, Security, and Development Interests Related to Hong Kong, Xinjiang, Tibet, and Taiwan. The PRC is concerned that perceived separatist elements in Hong Kong, Xinjiang, and Tibet are pushing for independence, buoyed by so-called "external forces." The PRC views this as an unacceptable threat to its sovereignty and stability, imperiling its national security and national development.

The PRC is implementing its interpretation of "One Country, Two Systems" in Hong Kong and Macau, wherein individuals who Beijing deems "patriots" administer those regions respectively, thereby ensuring "law-based governance." The PRC is investing in the Guangdong-Hong Kong-Macao "Greater Bay" development zone, expanding growth of high-tech industry from Guangdong into areas previously used for agriculture and fishing on the outskirts of Hong Kong and Macau. This will integrate them more tightly into the PRC's overall economic development.

The PRC has continued efforts to systematically dilute, control, and eventually assimilate local cultures in Xinjiang and Tibet into PRC society. After two German corporations began pulling out of joint ventures in Xinjiang citing discovery of forced labor and other human rights abuses at plants, Foreign Minister Wang Yi called the charges "made up lies" intended to prevent PRC's development and revitalization. In more sparsely populated Tibet, Beijing has accelerated its efforts at assimilating the local population into PRC society. In November 2023, Beijing released a white paper on Tibet calling for increasing use of the Han Chinese term "Xizang" to refer to the province, which has now been adopted by much of PRC state media.

In March 2024, responding to questions at a press conference at the National People's Congress (NPC), Foreign Minister Wang Yi dismissed Taiwan's January presidential elections as "just local elections in one part of China" that did not change the fact that Taiwan was part of the PRC. Characterizing support for Taiwan independence as a threat to peace, Wang Yi stated that the PRC would continue to strive for peaceful reunification but that the PRC would never allow Taiwan to be separated from the motherland.

Perceptions of the External Security Environment. In the past two years, President Xi presented his thoughts on the PRC's strategic environment on multiple occasions. For example, Xi regularly warns of "growing risks" and stresses that the PRC is on the brink of "changes unseen in a century" but that the PRC will benefit from a "profound adjustment in the international balance of power." In his speech at the 100th anniversary of the CCP in 2022, Xi asserted that, as the world experienced "once-in-a-century changes," the PRC had to adopt "a holistic approach to national security that balances development and security imperatives" and implement "the national rejuvenation." Speaking to a group of delegates attending the 14th National Committee of the

Chinese People's Political Consultative Conference, Xi asserted that "western countries led by the United States have implemented all-round containment, encirclement and suppression against us." PRC leaders view U.S. security alliances and partnerships, especially those in the Indo-Pacific, as destabilizing and irreconcilable with the PRC's sovereignty, security, and development interests.

Since just prior to the dissolution of the Soviet Union, PRC leaders have consistently characterized the PRC's security environment as undergoing intense changes and viewed the international order as shifting toward a multipolar system more commensurate with the PRC's development. The CCP views a shift toward a multipolar system as consistent with its perception of global power trends. This shift is vital for the PRC to advance its strategy, perceiving U.S. power as a constraint that impedes many of the PRC's goals. The PRC's leaders have eagerly embraced narratives of the West's relative decline and the inevitability of the PRC's rise as largely consistent with their strategy and evidence of the PRC's own progress. They have adopted a narrative of a "shared future for mankind," issuing a white paper advocating a formulation echoing many aspects of the "China Dream," calling for an "open, inclusive, clean and beautiful world that enjoys lasting peace, universal security, and common prosperity." Xi echoed these themes in his 2024 News Year's call with Russian President Vladimir Putin.

Beijing has expressed concerns over growing global instability and a mounting sense of insecurity that it views as instigated by the United States. The PRC's 2019 defense white paper criticized the United States as the "principal instigator" of global instability and driver of "international strategic competition." A 2023 PRC editorial in response to U.S. derisking efforts wrote that "the United States is willfully waging war, building dollar hegemony, and creating confrontation between camps." PRC leadership views U.S. policy toward the PRC as a critical factor affecting the PRC's national objectives and increasingly views the United States as more willing to confront Beijing where U.S. and PRC interests are inimical.

Given the enduring suspicion among some in Beijing that the United States' efforts to compete with the PRC are really efforts to "suppress" or "contain" the PRC, CCP leaders hold that the accrual of the PRC's comprehensive national power (CNP) will set the conditions for the PRC's ability to confront or dissuade the United States and prevent containment. As PRC leaders seek to translate the PRC's growing economic, military, diplomatic, and technological means into influence to advance their international aspirations, they must carefully balance the PRC's expanding interests across their priorities and resources.

Major Themes from Annual Party and State Meetings

- December 2023: Central Foreign Affairs Work Conference—Past Success Provides More Strategic Autonomy, New Strategic Opportunities Ahead

  Addressing the Central Foreign Affairs Work Conference, Xi stated that while the last decade had been challenging, the PRC had gained much more strategic autonomy and initiative in its diplomacy and had new strategic opportunities ahead of it to accomplish much more. The PRC was positioned to raise its international influence, appeal, and power to shape events to a new level, creating a more favorable international environment and providing "more solid strategic support for building China into a great modern socialist country in all respects and advancing the great rejuvenation of the Chinese nation." Xi advocated for the "community of shared future for mankind" characterized by greater multipolarity.

- March 2024: Second Session of the NPC in March 2024—Continued Moderate Growth; Emphasis on National Security, Food Security, Supply Chains, Resilience

  At the second session of the NPC in March 2024, the head of the State Council Premier Li Qiang reported that, despite an "unusually complex international environment," the PRC had managed to meet GDP growth goals and progress in implementing major science and research programs while achieving a record grain output of 695 million metric tons as it recovered from the pandemic. Objectives for the coming year included increasing efforts to improve self-reliance in S&T, enhancing the resilience and competitiveness of industrial and supply chains, and building a unified national market while ensuring energy and resource security. The government stated that it would increase internet and data security and take a holistic approach to uncovering and countering risks to national security.

  Addressing the PLA and People's Armed Police (PAP) delegates to the NPC, Xi emphasized the need to focus on advanced research in S&T, describing this as a "rare opportunity for the construction of strategic capabilities in emerging fields." In addition, he called for greater preparations for military struggle at sea, advancing the construction of the PRC's space system, building a cyberspace defense, and coordinating implementation of major intelligent technology.

THE PRC'S FOREIGN POLICY

Key Takeaways

- The PRC's stated foreign policy seeks to reshape the international order into what it calls a "community of common destiny" that supports its strategy to realize "the great rejuvenation of the Chinese nation." The PRC's ambition to reshape the international order derives from the objectives of its national strategy and its political and governing systems.

- At the end of 2023, PRC leaders claimed their power to shape world events continues to grow, presenting "new strategic opportunities" to create an environment favorable for PRC interests and national rejuvenation. At the 2023 Central Foreign Affairs Work Conference, Xi claimed PRC diplomacy was now better positioned to raise the PRC's international influence and facilitate national rejuvenation.

- The PRC employed a wide range of diplomatic tools throughout 2023 intended to erode U.S. influence globally and dilute U.S.-backed security partnerships, such as the Five Eyes and AUKUS, which Beijing perceives as avenues to constrain its rise.

- The PRC responded to the outbreak of the Israel-Hamas war by seeking to position itself as an advocate for peace in alignment with the Global South in support of the Palestinian cause. The PRC has criticized U.S. support for Israel's response in Gaza as fueling the fire of the conflict; it views the Red Sea crisis as a spillover effect from the Gaza conflict and has been critical of U.S. military activities in the Red Sea as contributing to regional insecurity.

- Although Russia's invasion of Ukraine continues to test the strength of Russia and China's strategic partnership, Beijing has sought to preserve its close ties with Moscow while

promoting its own image as a responsible great power, maintaining its "neutrality" in the war. Beijing has sought to balance its support to Moscow's defense industry while avoiding reputational or economic costs resulting from its assistance. Beijing has parroted Russian narratives when they align with China's criticism of the United States and has refrained from condemning its conduct or referring to Moscow's invasion as a "war." In 2024, China has sought to garner support for its joint six-point peace proposal, coauthored with Brazil, among developing countries in the Global South, probably seeking to position itself as a global peacemaker.

- Beijing continues to aggressively enforce extraterritorial sovereignty claims across the Pacific, and, in 2023, used water cannons, aggressive maneuvers and ramming, and military-grade lasers against SCS claimant nation ships—most prominently the Philippines—carrying out lawful maritime operations in the PRC's dashed-line claim.

Foreign Policy Goals in 2023. According to CCP officials, the overall goal of the PRC's foreign policy is to build a "community of common destiny" that aligns the international system governance architecture with the CCP's principles for how nations should interact. This goal is essential to how the PRC's foreign policy supports its broader strategy to achieve national rejuvenation. From the PRC's perspective, establishing this "community" is necessary to set the external security and economic conditions for the PRCs national rejuvenation by "safeguarding world peace" and "promoting common development" according to the CCP's principles. The PRC seeks to build a global network of partnerships to support this goal. PRC officials acknowledge that aspects of the existing international order are inconsistent with these objectives. The PRC's diplomatic framework seeks to remedy this by promoting changes in a more "fairer and more equitable direction."

The PRC has increasingly sought to use its growing diplomatic clout to promote a more prominent, global leadership role for Beijing in international affairs. The PRC continued to advance a diplomatic framework that it terms "major country diplomacy with Chinese Characteristics," based on the foreign policy direction determined by the CCP Central Committee and reaffirmed at the 2022 20th Party Congress and the 2023 Central Conference on Work Relation to Foreign Affairs. This framework seeks to advance the PRC's strategy of national rejuvenation by achieving the CCP's two centenary goals, improving the coordination of the PRC's major domestic and international policies, reforming aspects of the international order, adhering to the CCP Central Committee's direction, and defending the PRC's major interests. PRC leaders are increasingly aware that the PRC foreign security environment is becoming more unstable and dangerous, especially after the outbreak of the Israel-Hamas conflict and as Russia's war of aggression in Ukraine continues, which could disrupt the PRC's foreign policy objectives.

The CCP's theory of "socialism with Chinese characteristics"—how to adapt Marxism to the Chinese context—underpins the conduct of the PRC's foreign affairs. Since Xi assumed power in 2012, the CCP Central Committee has placed greater emphasis on PRC's foreign policy advancing "the cause of socialism with Chinese characteristics." In 2017, Xi defined 14 principles fundamental to this theory's success, including ensuring CCP leadership over all work and a whole-of-government approach to national security. In May 2023, Xi emphasized that understanding this theory was a "fundamental requirement" for advancing Beijing's causes, including foreign relations.

The PRC employed a wide range of diplomatic tools throughout 2023 to erode U.S. influence globally and dilute U.S.-backed security partnerships, such as the Five Eyes and AUKUS, which Beijing perceives as avenues to constrain its rise. The CCP remains frustrated by Washington's perceived use of an exaggerated PRC threat picture to cultivate an international coalition willing to constrain the PRC's foreign policy objectives. PRC leaders and officials have increasingly sought to bolster the PRC's relations with developing countries in Africa, Southeast Asia, Latin America, and the Middle East; co-opt regional multilateral organizations, such as the Association of Southeast Asian Nations (ASEAN); expand regional multilateral organizations, such as BRICS, to counterbalance Western institutions; and assert its status as the self-appointed de facto leader of the Global South. PRC officials have continued information operations (IO) and disinformation campaigns to mischaracterize AUKUS as a vehicle for nuclear proliferation and threat to regional stability to stoke international concerns about—and press countries to denounce—the trilateral security partnership. Through these engagements, Beijing aims to internationally isolate Washington and persuade countries that the United States is the sole party responsible for escalating U.S.-PRC tensions, as well as other global conflicts, primarily to deflect criticism of the PRC's efforts to reshape the international environment to protect its interests.

In recent years, global public opinion of the PRC has fallen. In 2023, the Pew Research Center reported that 67% of 30,000 respondents surveyed across Europe, Africa, Asia, and the Americas reported unfavorable views on the PRC—marking near- and record highs in its two decades of polling. Pew surveys showed that 81% of global respondents did not trust Xi Jinping to do the right thing regarding world affairs and that 76% of global respondents did not view the PRC as contributing to peace and stability around the world.

PRC Global Initiatives. The PRC's foreign policy framework is based around its entrenched perception that the East is rising and the West is in decline while noting that the concentration of power in international governance and institutions in the West creates an imbalance. As such, Beijing aims to promote and accelerate a transformation in the global order, including changing the distribution of power among states, revising the principles of interstate relations, and reforming global governance structures to better align with Beijing's vision. Since President Xi's first term in office, he and other PRC officials have described a desire to create a "Community of Shared Future for Mankind," contrasting this vision against the current global governance arrangement. According to then PRC State Councilor and Foreign Minister Wang Yi, global governance suffers from "weaknesses and deficiencies," highlighted by the COVID-19 pandemic, necessitating a new approach. To "seize opportunities" for reform, the PRC is actively pursuing the creation of new multinational organizations, forums, and a series of key global initiatives to uphold the authority of the CCP and the PRC's national sovereignty, security, and development interests.

The PRC has three major initiatives to realize this global vision—the Global Development Initiative (GDI), Global Security Initiative (GSI), and the Global Civilization Initiative (GCI). Since 2021, the PRC has reclassified its historical efforts under these new broad umbrellas.

Xi announced the GDI at the 76th session of the United Nations General Assembly in September 2021. Subsequent concept papers and updates have defined it as a global effort for "inclusive economic growth for all nations" to "coordinate policies among major economies" and promote "true multilateralism." The BRI, active since 2013, has been deemed part of the GDI in subsequent concept papers.

Xi announced the GSI at the Bo'ao Forum in April 2022. Beijing published a concept paper on the GSI in February 2023 that loosely defined GSI as an effort to uphold state sovereignty, "common security," and the United Nations charter, with a focus on multilateral security. It enumerates what the PRC calls its "20 Priorities" for cooperation, which place established international institutions and frameworks Beijing supports, such as the Biological Weapons Convention and ASEAN, under the GSI framework while omitting those it does not support, like the United Nations Convention on the Law of the Sea (UNCLOS). This framing aims to build global support for GSI by integrating successful international frameworks and initiatives into Beijing's foreign policy organizing principles. Beijing almost certainly uses the GSI as a foundational baseline for its proposed peace plan to end Russia's war against Ukraine.

President Xi announced the GCI in March of 2023. While it remains the least-defined of the global initiatives, Wang Yi has described it as an effort to "Promote mutual understanding and affinity between people of different countries." PRC media and representatives have noted the Confucius Institutes, operating globally since 2014, as an example of the GCI in practice.

At the CCP's 20th Party Congress in October 2022, Xi further advertised GSI and GDI, emphasizing that realizing the "great rejuvenation of the Chinese nation" required equal prioritization of both security and development. Despite the publication of the GSI concept paper in February 2023, the GSI remains poorly-defined. The concept paper primarily repeats standard PRC talking points about "win-win cooperation," eliminating the "root causes" of conflicts, and ending the "Cold War Mentality" it ascribes to the United States and the West. Beijing has promoted GSI extensively and attempted to insert GSI language into multilateral forums and documents, particularly in international institutions like the UN, and has ascribed PRC success in 2023 mediating the Saudi Arabia-Iran normalization deal to the principles of the GSI. GDI's link to BRI has made the initiative more attractive to some developing countries while GSI's vagueness, lack of concrete deliverables, and implicit criticisms of the United States and excluding of international norms have made more countries hesitant to sign on to it.

Belt and Road Initiative. First announced in 2013, the BRI is Xi's signature foreign and economic policy that rebranded and further expanded the PRC's global outreach. Beijing uses the BRI to support its strategy of national rejuvenation by seeking to expand global transportation and trade links to support its development and deepen its economic integration with nations along its periphery and beyond. The PRC implements BRI by financing, constructing, and developing transportation infrastructure, natural gas pipelines, hydropower projects, digital connectivity, and technology and industrial parks worldwide. As of 2023, at least 149 countries had signed BRI cooperation documents—up from 147 countries in 2022, 146 in 2021, 138 in 2020, and 125 in 2019.

In support of its national strategy, Beijing leverages BRI to strengthen its energy security, build export markets, project power, and increase international influence. The PRC aims to improve stability and diminish threats, for example, by investing in projects along its western and southern periphery. Similarly, through BRI projects associated with pipelines and port construction in Pakistan, the PRC seeks to become less reliant on transporting energy resources through strategic choke points, such as the Strait of Malacca. It also attempts to exploit the relationships it builds through the BRI to pursue additional economic cooperation and trade with participating countries.

Over the past decade, overall BRI investments peaked in 2016 to 2018 then sharply retracted in 2020 due to the economic impact of the COVID-19 global pandemic. Overall investment remains well below the 2016 to 2018 peak. In 2023, the relative composition of BRI investment across financial investment and construction continued trends that started in 2022 with financial investment at 52% of overall BRI investments and the remaining 48% dedicated to construction. By comparison, more than 70% of BRI investment in 2021 went toward construction.

BRI construction projects are typically backed by Beijing and include loans from PRC financial institutions. Recently, BRI construction projects have been smaller and, in 2023, they had the second-lowest average value of any year since 2013. Conversely, projects considered investments, in which PRC investors take equity stakes with higher risks, continue to grow from 2020 lows, as PRC investors' risk appetites grow.

Regionally, Africa received the greatest share of BRI investment in 2023, more than doubling its 2022 levels and surpassing the Middle East. In December 2023, Italy opted to end its BRI participation, becoming the first country to officially withdraw from the BRI. Rome cited the lack of tangible economic benefits promised by BRI membership as the primary reason for its withdrawal. Prior to its withdrawal, Italy was the largest economy signed to the BRI.

As the BRI has expanded, Beijing has introduced three sub-efforts: the Health Silk Road (HSR), the Green Silk Road (GSR), and the Digital Silk Road (DSR), which it describes as "sub-initiatives" to expand beyond the BRI's traditional infrastructure focus.

The HSR is the PRC's World Health Organization–supported initiative for providing medical assistance through BRI transportation networks. In the future, it may help the PRC expand the international market share of PRC medical products, strengthen its bid for a role as a global public health leader, and identify—and justify—the need for new BRI projects in traditional infrastructure and healthcare investment.

The GSR aims to support low-carbon infrastructure, energy, and finance projects; this initiative aligns with the PRC's own goal of achieving carbon neutrality before 2060 and presents Beijing as a responsible party in working toward the 2030 Agenda for Sustainable Development Goals established by the United Nations General Assembly.

The DSR is one of the primary ways Beijing seeks to transfer PRC technology to partner countries to build strategic dependencies, which the PRC leverages to propagate its own technology standards as it seeks to set global standards for next-generation technology. Announced in 2015 as a digital subset of BRI, the DSR seeks to build a PRC-centric digital infrastructure, export industrial overcapacity, facilitate expansion of the PRC's technology corporations, and access large repositories of data. As of 2016, 16 countries had signed memorandums of understanding with Beijing to participate in the DSR. The PRC hopes the DSR will increase international e-commerce by reducing cross-border trade barriers and establishing regional logistics centers by promoting e-commerce through digital free trade zones.

Another goal of the DSR is to reduce PRC dependence on foreign tech leaders by providing markets for PRC goods, thereby creating production opportunities for PRC tech firms. The PRC is investing in digital infrastructure abroad, including next-generation cellular networks—such as fifth-generation (5G) networks—fiber optic cables, undersea cables, and data centers. The initiative includes developing advanced technologies, such as satellite navigation systems, artificial intelligence (AI), and quantum computing for domestic use and export. International

critics of the DSR are concerned that Beijing will encourage recipient countries to use this technology as a tool of repression modeled on the PRC's authoritarian-style government. Host country political elites could be vulnerable to espionage and political blackmail.

Since BRI's inception, its long-term viability has faced challenges from international concerns over corruption, debt sustainability, and environmental effects, coupled with suspicion of the PRC's motives and the risk inherent in operating in politically unstable areas. These international concerns have prompted promises from President Xi at the third Belt and Road Forum in October 2023 that the PRC would address debt, corruption, and financial risk in BRI projects. The PRC has applied military, intelligence, diplomatic, and economic tools to counter perceived threats but party-state leaders lack the expertise to assess comprehensive risks in most participating countries.

As overseas development and security interests have expanded under BRI, the PRC has signaled that its overseas security footprint will increase to protect those interests, which Beijing recognizes may provoke pushback from other states. Some of BRI's planned or active economic projects and corridors transit regions prone to violence, separatism, armed conflict, and instability, putting BRI-related projects and PRC citizens working overseas at risk. In 2024, attacks on PRC citizens supporting the development of BRI projects along the China-Pakistan Economic Corridor prompted Beijing to lobby Pakistan for a joint security agreement to protect PRC citizens in Pakistan. In 2023, three PRC citizens were kidnapped and nine were killed within a week near a mine in the Central African Republic, marking the deadliest-ever attack on PRC citizens in Africa.

The PRC has, therefore, sought to extend its ability to safeguard its overseas interests, including BRI, by developing closer regional and bilateral counterterrorism cooperation and supporting host-nation security forces through military aid, including military equipment donations. In an October 2022 speech to the National Party Congress, Xi spoke of the need to become more adept at deploying the PLA to protect the PRC's national security interests. The PRC's 2023 National Defense Concept notes that the PLA must "safeguard China's overseas interests."

PRC EFFORTS TO PROMOTE GSI ABROAD

PRC state-run media outlets publish multiple articles daily to promote the GSI abroad, including in English, Spanish, French, and Russian. These reports frequently quote local voices as well as current and former PRC and non-PRC government officials expressing support for GSI. PRC diplomats publish signed articles promoting GSI in local newspapers all around the world. While some foreign-language PRC media reports and signed articles are tailored to local audiences, most reports emphasize four key themes: (1) the GSI promotes world peace and shared prosperity; (2) the West's security framework is based on a hegemonic, Cold-War mindset that leads to crises; (3) the "International Community" supports GSI, especially in Africa, the Middle East, Latin America, parts of Asia; and (4) the GSI represents "true multilateralism." Although these reports state that the GSI "seeks concrete actions and tangible results," they do not articulate a framework, mechanisms, list of signatories, or other specifics about how and what the GSI does.

Relationship Between PRC Foreign Policy and Defense Policy. At the 2023 Central Conference on Work Relating to Foreign Affairs, Xi emphasized that the PRC must "advance the cause of socialism with Chinese characteristics" in a "new period of turbulence and transformation." This goal probably informs the PRC's view of how its security apparatus serves foreign policy: as a tool for managing an increasingly unstable external security environment to better protect PRC interests.

Managing that security environment takes a variety of forms. With some of its strategic partners, the PRC routinely engages in military cooperation (e.g., high-level military visits, combined exercises, and exchanges) to maintain or strengthen bilateral ties it perceives can help achieve its foreign policy goals. The PRC's extensive military relationships with Pakistan and Russia, for example, support partnerships it considers key to success in strategic competition. Likewise, its growing military relationship with Gabon in 2023—conducting a PLAN goodwill visit and seeking to secure military access in the Gulf of Guinea—reflects Beijing's sustained interest in winning African support for its global policy proposals. With other strategic partners, however—such as Saudi Arabia or the United Arab Emirates—the PRC gives less priority to military cooperation, probably, in part, because it finds diplomatic and economic channels as more effective in achieving its foreign policy goals.

With countries like the United States, which the PRC views as a competitor, the PRC focuses military cooperation—primarily military diplomacy—on conflict avoidance. From the PRC perspective, such engagements can help maintain stable relations that quell the "turbulence" that threatens PRC interests. The lack of such engagements can telegraph Beijing's displeasure. Following the August 2022 Congressional Delegation (CODEL) to Taiwan, the PRC rebuffed or ignored outreach from a variety of defense officials until tensions began to ease in August 2023 and Xi agreed that November to resume military-to-military communications.

PRC-Russia Relationship. In 2023, the PRC continued partnering with Russia to counter the United States and advance its preferred vision for the international system. Most notably, PRC support for Russia's war against Ukraine, including significant trade in dual-use goods to rebuild Russia's defense industrial base, remained robust. During 2023, Beijing promoted Russian narratives blaming the United States and NATO for the war, buoyed Russia's economy against international sanctions by purchasing energy, increasing trade to record levels, and selling Russia necessary dual-use inputs that Russia's military industries rely on, such as microelectronics, precision machine tools, spare parts, titanium and magnesium alloys, and chemical inputs for munitions production. In Europe, Beijing and Moscow have jointly called for a shift away from the continent's Western-led security apparatus toward a Eurasian-led security architecture. However, Beijing probably will struggle to pursue this aim in Europe due to its tacit support for Russia's invasion of Ukraine.

Beijing was largely unresponsive to international criticism over its support to Russia, barring a few exceptions. This year, the PRC special envoy for Eurasian Affairs, Li Hui attended the Ukraine peace conference in Jeddah, Saudi Arabia, which Russia was not invited to, and claimed to have "further consolidated international consensus." The PRC restricted and then loosened export controls on unmanned aerial vehicle (UAV) exports after international scrutiny of the PRC's supply of commercial UAVs to the Russian war effort.

Despite the strain of Russia's war against Ukraine, the PRC and Russia maintained their bilateral military exercise schedule at 2022 levels. Exercises during 2023 included two combined bomber patrols, a new naval exercise called NORTH COOPERATION and combined naval patrols into the Bering Sea. In September 2024, China and Russia conducted the second iteration of NORTHERN COOPERATION, likely followed by a combined naval patrol to the Sea of Japan, which likely included anti-submarine defense and sea rescue training. Although these activities probably modestly improved their capabilities and interoperability, their main effect signaled the strength of the PRC-Russian partnership. The PRC and Russia participated together in trilateral naval exercises with South Africa and separately with Iran, both aimed at improving participants' military cooperation and maritime security.

The PRC almost certainly is applying lessons from Russia's war against Ukraine toward countering what it perceives as a U.S.-led containment strategy. Diplomatically Russia's war against Ukraine probably reaffirmed to Beijing the importance of persuading countries Beijing considers the Global South in Africa, Latin America, the Middle East, and the Indo-Pacific region to accept PRC narratives about global dynamics. The PLA probably seeks to incorporate lessons from how Russia and Ukraine are employing influence operations in the conflict into its own doctrine. The effects of Western sanctions against Russia almost certainly have amplified the PRC's push for defense and technological self-sufficiency as well as economic and energy resilience.

Evolving PRC-DPRK-Russia Relationship. Since the fall of the Soviet Union, the PRC has been the Democratic People's Republic of Korea's (DPRK's), or North Korea's, principal supporter. The PRC constitutes the vast majority of the DPRK's external trade and North Korea depends on the PRC for energy, fertilizer, and food imports. Beijing values the DPRK as a buffer between the PRC and South Korea and the U.S. forces stationed there. Beijing is reluctant to economically punish North Korea because it fears punitive measures could destabilize the Kim regime.

Though it is a partner to the DPRK and Russia, Beijing has publicly distanced itself from Moscow and Pyongyang's growing defense cooperation, referring to it as a strictly bilateral matter. Beijing probably views close association with North Korea-Russia cooperation as a risk to its desired reputation as a responsible great power, especially as Russia and North Korea collaborate to violate UN sanctions that the PRC supports. The possibility that Russia might transfer weapons technology or dual-use items, which could support Pyongyang's nuclear weapons program, runs counter to Beijing's stated opposition to nuclear weapons on the Peninsula.

While distancing itself from Russia-North Korea cooperation, the PRC has deepened engagement with Pyongyang, in December 2023 holding the first high-level PRC-North Korea meeting since 2019 and announcing that 2024 would be a "Year of Friendship" between the PRC and North Korea. These efforts are probably an effort to counterbalance Russian engagement with the DPRK.

Relationship and Engagement with the Pacific Island Region. Since 2015, the PRC has probably viewed engagement and deliberate corruption in the Pacific Island Countries (PICs) as an opportunity to expand its regional influence, press countries to switch diplomatic recognition from Taipei to Beijing, increase influence with regional security forces, and advance the PRC's responsible great power narrative. In November 2023, the PRC completed a 10,000-seat stadium, in addition to other sports facilities, for the Solomon Islands in preparation for the 2023 Pacific Games. The PRC has made efforts to improve its police cooperation in the region—since 2022,

the PRC has held ministerial dialogues on police cooperation and capacity building with the Solomon Islands, Fiji, Vanuatu, Kiribati, Tonga, and Papua New Guinea. In July 2023, the PRC and the Solomon Islands signed a police cooperation agreement as part of an upgrade to their bilateral comprehensive strategic partnership. In August 2023, the PRC and Vanuatu increased police cooperation through the placement of a police liaison team in Vanuatu. The PRC has resorted to corruption, bribery, and personal threats to advance its influence in the PICs. In March 2023, outgoing Federated States of Micronesia President David Panuelo criticized the PRC for its widespread bribes of Micronesian officials and reported PRC officials made direct threats to his personal safety. In January 2024, the PRC re-established diplomatic relations with Nauru.

Relationship with Iranian Proxies. The PRC balances its broader regional interests with limited engagement of Iranian proxies, such as Hezbollah in Lebanon, the Houthis in Yemen, or Iranian-backed militia groups in Iraq. PRC officials, including the PRC's Special Envoy to Syria, publicly met with Hezbollah officials to discuss the Syrian civil war in 2016 but such engagements almost certainly are perfunctory and focused on advancing the PRC's responsible great power narrative rather than the PRC seeking to expand ties with these groups. PRC officials probably calculate that publicly or overtly expanding relations with Iranian proxies, especially Iranian-backed militia groups in Iraq, would alienate regional governments and disrupt the PRC's policy avoiding entanglement in the Middle East. Yet, the PRC has avoided publicly criticizing some of these proxies. The PRC has avoided blaming the Houthis—and Iranian support—for attacks on Red Sea shipping, instead framing disruption in the Red Sea as a byproduct of Israeli military activity in Gaza and criticizing subsequent U.S. strikes in Yemen. However, Houthi procurement networks rely on PRC-based suppliers to supply and facilitate shipments of dual-use components and equipment for Houthi missile and UAV manufacturing.

The PRC has maintained diplomatic, economic, and some security ties with the Assad regime in Syria. Since 2016, the PRC's special envoy to Syria has focused the PRC's efforts on political support to the Assad regime, facilitating a political resolution to the civil war, humanitarian assistance, reconstruction, and counterterrorism. In 2022, the PRC reached an agreement with Syria to join the BRI; no significant BRI infrastructure development in Syria has been observed.

Military Engagements with Taliban Government in Afghanistan. There were no known PLA military engagements with the Taliban government in 2023. However, in May 2023, the PRC foreign minister met in Islamabad with his Afghan and Pakistani counterparts to discuss stability in Afghanistan, regional peace, counterterrorism, security for PRC nationals, institutions, and projects in the region. Beijing remains concerned about perceived threats to domestic stability in Xinjiang posed by armed Islamic militants in Afghanistan, particularly Uyghur extremists. PRC security concerns continue to preclude official recognition of the Taliban regime and expanded economic investments in Afghanistan, according to Hong Kong press reporting.

Stance on Israel-Hamas War. Since the outbreak of the Israel-Hamas conflict, the PRC has sought to position itself as an advocate for peace in the region and aligned with the Global South in support of the Palestinian cause. In press statements and international fora, the PRC has repeatedly called for an immediate ceasefire in Gaza and negotiations leading to a two-state solution to the Palestinian crisis. The PRC made Gaza the focal point of UN Security Council proceedings when it held the rotating presidency at the UN in November 2023. Beijing has avoided assuming a direct diplomatic and military role in the conflict. The PRC has implicitly criticized

U.S. support for Israel's response in Gaza as fueling the fire of the conflict, and that Israeli military actions in Gaza have exceeded Israel's right to self-defense.

The PRC views the Red Sea crisis—characterized by Yemen-based Houthi militants firing missiles at transiting maritime vessels they perceive to be associated with Israel—as a spillover effect from the Gaza conflict and has been critical of U.S. military activities in the Red Sea as contributing to regional insecurity. Despite the PRC's own commercial interests and nearby support base in Djibouti—established explicitly to support PLA operations against piracy and other threats to maritime shipping in the region—the PLA has been unwilling to support a U.S.-led international shipping protection coalition in the Red Sea. Subsequently, its shipping costs rose as international shipping has begun to use alternative routes and avoid shipping through the Red Sea. Beijing has been unable to use its ties with Iran to compel the Houthis to cease attacking international shipping.

Territorial Disputes with India, East China Sea, and South China Sea. The PRC's use of force in territorial disputes has varied widely since 1949. Some disputes led to war, as in border conflicts with India in 1962 and Vietnam in 1979. The PRC's contested border with the Soviet Union during the 1960s raised the possibility of nuclear war. In recent cases involving land border disputes, the PRC has sometimes been willing to compromise with and offer concessions to its neighbors. Since 1998, the PRC has settled 11 land-based territorial disputes with six of its neighbors. However, in the last decade, the PRC has employed a more coercive approach to deal with disputes over maritime features, rights to potentially rich offshore oil and gas deposits, and border areas.

South China Sea. The SCS plays an important role in security considerations across East Asia because of the region's reliance on the flow of oil and commerce through SCS shipping lanes, including more than 80% of the crude oil to the PRC, Japan, South Korea, and Taiwan. The PRC maintains sweeping sovereignty claims in the SCS, including unlawful maritime claims to waters in an ambiguous "dashed line" circumscribing the vast majority of the SCS. These claims extend over the Spratly and Paracel Islands and other land features, which are disputed in whole or part by Brunei, the Philippines, Malaysia, and Vietnam. In 2016, a unanimous Arbitral Tribunal constituted under the 1982 Law of the Sea Convention determined that the PRC's expansive SCS maritime claims are inconsistent with international law. The arbitral decision is final and legally binding. The PRC continued to employ the PLAN, China Coast Guard (CCG), and China Maritime Militia (CMM) to patrol the region and aggressively enforce the PRC's unlawful claims throughout 2023. In 2023, the PRC frequently adopted unsafe and unprofessional measures, such as firing water cannons, aggressive maneuvers and ramming, and directing military-grade lasers against SCS claimant nation ships—most prominently against the Philippines—lawfully operating in the SCS, resulting in injuries to crew members and damage to government and civilian ships.

East China Sea. The PRC and Japan have overlapping claims to the continental shelf and the exclusive economic zones (EEZs) in the East China Sea (ECS). The ECS contains natural gas and oil, although hydrocarbon reserves are difficult to estimate. Japan maintains that an equidistant line from each country involved should separate the EEZs while the PRC claims an extended continental shelf beyond the equidistant line to the Okinawa Trench. The PRC continues to assert sovereignty over the Japan-administered Senkaku Islands and reiterate the importance of abiding by the four-point consensus signed in 2014, which states both sides acknowledge divergent positions over the ECS dispute but prevents escalation through dialogue, consultation, and crisis management mechanisms. PRC government ships were detected in the contiguous zone around the

Senkakus on 352 days in 2023—a record high for the period since Japan nationalized the islands in 2012. Japan remains concerned with the persistent deployment of CCG ships and fishing vessels in disputed ECS waters and contests the PRC's claim of sovereignty.

Exclusive Economic Zone. The PRC has long challenged foreign military activities in its claimed EEZ in a manner inconsistent with customary international law reflected in the UNCLOS. The PRC routinely shadows and challenges U.S., allied, and partner military assets operating outside the territorial sea of any SCS claimant and occasionally conducts risky and coercive maneuvers, such as close intercepts of aircraft or dangerous at-sea maneuvering to exert Beijing's extraterritorial sovereignty claims. The PLA has used lasing, aerobatics, acoustic devices, the discharge of objects, and other activities that impinged on the ability of nearby aircraft and vessels to maneuver safely where high seas freedoms apply. PRC survey ships are extremely active in the SCS and frequently operate in the claimed EEZs of other nations in the region, such as the Philippines, Vietnam, Indonesia, and Malaysia.

CHINA'S CLAIMED MARITIME LIMITS AND BOUNDARIES



India. Tensions with India along the Line of Actual Control (LAC)—a disputed border between the PRC's western provinces and India's northern provinces—sparked a standoff between PRC and Indian forces in mid-May 2020, which escalated on June 15, 2020, after a skirmish ensued in the Galwan Valley between Indian Army and PLA forces that ended with 20 Indian soldiers and four PRC soldiers dead. The two sides agreed to tactical pull-backs from most of the contested areas in early 2021 but standoffs continue at two locations in Ladakh on the Western Sector of the LAC. In late 2022, PRC and Indian forces engaged in an unarmed clash near Tawang along the Eastern Sector of the LAC separating Tibet and the Indian state of Arunachal Pradesh. This was the first such clash since the 2020 skirmish although local commanders quickly defused the clash and the overall standoff did not substantively escalate. These engagements coincide with a significant and sustained escalation in military infrastructure to support a long-term presence on the LAC. In late 2023, India hosted the 20th round of commander-level meetings with the PLA. Both sides agreed to maintain communication and dialogue through military and diplomatic channels.

DISPUTES OF CHINA-INDIA-BHUTAN



THE PRC'S ECONOMIC POLICY

In March 2024, Premier Li Qiang acknowledged that internal and external challenges had complicated the PRC's economic recovery and growth in 2023. Beijing's plans for 2024 include leveraging perceived favorable factors in the PRC's long-term growth trajectory while mitigating risks to economic stability.

The 20th Party Congress in October 2022 emphasized the importance of quality growth rather than the speed of growth. General Secretary Xi highlighted common prosperity, more equitable access to basic public services, a better multi-tiered social security system, and cultural and green developments as a few of the PRC's economic initiatives.

The PRC's tools of economic statecraft include inducements, such as infrastructure investments under BRI; industrial and technology policies, such as "Made in China 2025" and its Military-Civil Fusion (MCF) Development Strategy that seek to indigenize technologies and supply chains, including by pursuing foreign technology transfers in exchange for market access; protectionist policies and legal barriers for foreign firms to compete in the PRC's domestic market; selective observance of trade commitments; and economic coercion against other states.

The PRC's military modernization objectives are part of the PRC's broader national development aspirations and work in coordination with the PRC's economic policies and systems. PRC's leaders directly link the pace and scale of the PLA's modernization with the country's overall development. The PRC's economic, political, social, and military development efforts are mutually reinforcing and support its strategy of national rejuvenation. The CCP prioritizes the PRC's economic development as the "central task" and frames its economic system as the means of advancing the nation's overall political and social modernity. In particular, the PRC's economic policy focuses intensely on advancing what the CCP calls the country's "new quality productive forces" (e.g., industry, technology, infrastructure, and human capital), which it views as the means to achieve the country's political and social modernity—including building a "world-class" military.

CCP leaders have cast the PRC's partial adoption of market features—which were implemented as part of its "reform and opening up" that began in the late 1970s and, subsequently, led to an economic transformation—as evidence that its strategy to modernize the PRC has been succeeding rather than viewing the market feature adoption as a repudiation of the CCP's fundamental economic ideals. According to the CCP, the contemporary PRC remains at the beginning stage or the "primary stage of socialism" with a long process of socialist modernization ahead.

The CCP conceives of its economy as constituting the "basic economic system" in which public ownership is dominant and state, collective, and private forms of ownership develop side by side. The basic economic system comprises the PRC's public ownership economy and the multi-ownership economy.

The PRC will continue to pursue the economic policy objectives determined by the CCP Central Committee and set forth in the 14th Five-Year Plan (FYP) covering 2021–2025. The PRC's economic goals are (1) furthering supply-side structural reform, (2) making the PRC a country of innovators, (3) pursuing a rural vitalization strategy, (4) implementing the coordinated regional development strategy, (5) accelerating efforts to improve the socialist market economy, and (6) making new ground in pursuing "opening up on all fronts." The priorities and goals in the FYPs not only apply to the government and the public ownership economy but serve as implicit guidance from the CCP to the multi-ownership economy.

In March 2024, the government announced that the PRC had achieved 5.2% growth in 2023, meeting the overall growth target for the year. Beijing also announced its economic growth target of around 5% in 2024 and a debt-to-GDP ratio goal of 3%. Beijing expects to create over 12 million jobs in urban areas and keep the urban unemployment rate at around 5.5% in 2024, figures in line with 2023.

The PRC's draft of the 2024 National Economic and Social Development Plan focuses on the prevention and control of major economic and financial risks, which includes the stable development of the real estate market and building a modern industrial system with an emphasis on technological innovation. Key economic tasks for 2024 include expanding domestic demand, reforming the tax system, and supporting emerging industries—such as electric vehicles, biotechnology, and airplane manufacturing—while addressing risks in the real estate market.

Beijing may struggle to achieve these objectives. Ensuring low unemployment and stabilizing the PRC's housing markets, for example, may require policy tools that undermine efforts to address long-term financial risk or hamper efforts to focus the economy on industries of the future.

The PRC government is concerned about economic risks associated with prolonged housing market corrections and may be more inclined to deliver funding support for developers and further easing measures on the demand side to stabilize the sector amid the overall economy's slowing growth. At the same time, the PRC will continue to introduce policies aimed at longer-term debt reduction and more restricted credit requirements to address systemic risks to real estate sector stability.

The 20th Party Congress unveiled a new economic leadership team to advance Xi's goal of rejuvenation of the Chinese nation on all fronts. Economic growth is a necessary condition for the PRC to realize this goal, with more emphasis on quality and inclusive growth as well as security requirements. The Party Congress vowed to grow the PRC's per capita GDP to be on par with that of a mid-level developed country, which it defined as income of $20,000 per capita. This implies average growth of approximately 3.5% during 2022 to 2035. Xi's new economic team has broad technocratic qualifications. Of note, Xi elevated Vice Premier Zhang Guoqing to State Councilor in charge of science, technology, and industry. Zhang has a doctorate in economics, which suggests a focus in Xi's third term on increasing economic strength and scientific technological capabilities.

The PRC's introduction of market economy features in the "basic economic system" without a full transition to free and open markets has resulted in laws, regulations, and policies that generally disadvantage foreign firms compared with their PRC counterparts in terms of tradable goods, services sectors, market access, and foreign direct investment. Examples of the PRC's unfair economic policies and trade practices include its support to domestic industries at the expense of foreign counterparts, technology transfer requirements, subsidies to lower the cost of inputs, policies that contribute to excess capacity in multiple industries, sector-specific limits on foreign direct investment including partnership requirements and other barriers to investment, discriminatory cybersecurity and data transfer rules, insufficient intellectual property rights protection and enforcement, inadequate transparency, and lack of market access—particularly in the information and communications technology (ICT), agriculture, and service sectors. Market access remains difficult for some foreign firms because the PRC restricts certain inbound investment, resulting in persistent underperformance in other countries' services exports, particularly in the banking, insurance, internet-related, professional, and retail services sectors.

The PRC seeks and obtains foreign technology through foreign direct investment, overseas acquisitions, legal technology imports, the establishment of foreign research and development (R&D) centers, joint ventures, research and academic partnerships, talent recruitment, industrial espionage and theft, and cyberspace espionage and theft.

Recognizing that some of its initiatives, such as MCF, "Made in China 2025," and BRI, have sparked concerns about Beijing's intentions, PRC leaders have adopted lower profile rhetoric when promoting these initiatives without altering their fundamental strategic goals.

Made in China 2025: First announced by the PRC in May 2015, the "Made in China 2025" plan seeks to enhance PRC economic and technological capacity by setting higher targets for domestic manufacturing in strategic industries, such as robotics, power equipment, and next-generation information technology by 2020 and 2025. This plan seeks to strengthen the PRC's indigenous manufacturing capability in critical sectors and calls for government intervention to meet these objectives. Advanced countries criticized "Made in China 2025" for unfairly favoring the PRC's domestic enterprises at the expense of foreign participants in PRC markets. Increasingly aware and sensitive to these concerns, by June 2018, the PRC began avoiding references to "Made in China 2025" in major policy papers. Despite the adjustments in its narrative, the PRC has largely continued implementing the policies behind "Made in China 2025," and the most important goals of this initiative likely remain unrealized.

Dual Circulation: In 2020, Xi articulated the economic policy of dual circulation, which aims for a largely self-sufficient PRC that innovates, manufactures, and consumes from its own economy while still drawing on the international economy through exports, critical supply chains, and limited imports of capital. Dual circulation seeks to enable the internal markets and external markets to reinforce each other, with a focus on establishing the domestic market as the primary driver of economic growth.

The PRC continues to make significant investments in emerging technologies with dual-use applications, including microelectronics, AI, and quantum technologies. The PRC views these technologies as among its top priorities for economic development and almost certainly believes they are necessary contributors to its military modernization.

PRC domestic investments in emerging dual-use technologies are spread across public, private, and military sectors—challenging quantification of investment magnitude. One industry association estimated that the PRC will spend over $150 billion from 2014 to 2030 on semiconductors alone.

Legal framework. In recent years, the PRC has implemented new laws placing further restrictions on foreign firms while creating or strengthening the legal framework for the CCP's national security concepts and, in some cases, furthering its MCF Development Strategy (discussed in the next section). The PRC has used lawfare to reinforce its claims in the SCS and in the Taiwan Strait.

National Security Law: Adopted in July 2015, the law limits foreign access to provide a broad framework for safeguarding the PRC's security interests. It calls for review and monitoring of foreign participation in the ICT market in the PRC on national security grounds.

Counterterrorism Law: Adopted in December 2015, among its provisions, the law requires telecommunications operators and internet service providers to provide information, decryption, and other technical support to public and state security organizations "conducting prevention and investigation of terrorist activities."

National Defense Transportation Law: Coming into effect in 2016, the National Defense Transportation Law advances the PRC MCF Development Strategy by laying the groundwork for the PLAN to mobilize civilian maritime transportation resources and facilities to support power projection missions.

Cyber Security Law: The law, which went into effect in June 2017, promotes development of indigenous technologies and restricts sales of foreign ICT in the PRC. The law requires foreign companies to submit ICT for government-administered national security reviews, store certain data in the PRC, and seek government approval before transferring certain data outside of the PRC.

Intelligence Law: Adopted in June 2017, the law allows authorities to monitor and investigate foreign and domestic individuals and organizations to protect national security. Specifically, it allows authorities to use or seize vehicles, communication devices, and buildings to support intelligence collection efforts.

Cryptography Law: Adopted in October 2019 and coming into effect in 2020, this law requires entities working on cryptography to have management systems to ensure sufficient security for their encryption. Although the law encourages development of commercial encryption technology, those technologies' use cannot harm national security or the public good. It provides for the State Cryptography Administration and its local agencies to have complete access to cryptography systems and the data protected by those systems.

Anti-Foreign Sanctions Law: Adopted at the 29th meeting of the Standing Committee of the 13th NPC on June 10, 2021, the law was enacted to "safeguard national sovereignty, security, and development interests, and to protect the legitimate rights and interests of Chinese citizens and organizations." According to PRC media sources, the law seeks to "counter, fight, and oppose" unilateral sanctions on the PRC imposed by foreign countries. The law was likely adopted in response to sanctions on PRC officials in connection with serious human rights abuse in Xinjiang.

Data Security Law: This law went into effect on September 1, 2021, and subjects a wide range of data activities to regulatory review, as PRC officials grew concerned about the transfer of potentially sensitive data overseas. Ambiguity as to what data are subject to the provisions of this law increases difficulties for firms conducting business with the PRC.

Counterespionage Law: On April 26, 2021, the PRC adopted a counterespionage law permitting the Ministry of State Security (MSS) authority to identify companies and organizations deemed susceptible to foreign infiltration or influence and require these institutes to implement measures to prevent foreign infiltration. In July 2023, the PRC adopted an amended counterespionage law with a broader scope. The amended law expanded the definition of espionage from covering state secrets and intelligence to any documents, data, materials, or items related to national security, without defining these terms.

Export Controls: Since U.S. semiconductor-related export controls announced in October 2022, Beijing has announced export license requirements on gallium, germanium, and graphite for which the PRC controls 98%, 68%, and 65% of the global market, respectively. In 2023 and 2024, the PRC announced additional information reporting requirements for exports of other commodities, including rare earths, for which the PRC controls 85% of global processing capacity, and has imposed export restrictions on rare earths processing equipment. These mineral export restrictions

amend and expand on the PRC's 2020 Export Control Law and the related Catalog of Controlled Technologies that limit or prevent the sale of dual-use technologies, such as drones and aerospace technologies, to foreign entities.

State Secrets Law: Adopted in 1988, the February 2024 amendment to the law, which went into effect May 1, 2024, expanded the scope of protected sensitive information to include "work secrets," which remains undefined. The law further threatens to restrict a wide range of legitimate commercial, academic, and research activities and exchanges.

Coast Guard Law: The Standing Committee of the PRC's NPC passed the Coast Guard Law, which took effect on February 1, 2021. The legislation regulates the duties of the CCG, including the use of force, and applies those duties to seas under the jurisdiction of the PRC.

Taiwan Anti-Secession Law: In 2005, the National Party Congress passed the Anti-Secession Law, providing legal justification for Beijing to employ non-peaceful measure to prevent the permanent separation of Taiwan. According to the law, Beijing noted a need to respond to three conditions: (1) secession "in any name by any means," (2) a "major incident" entailing secession, and (3) circumstances in which the "possibilities for a peaceful reunification" are "completely exhausted."

THE PRC'S MILITARY-CIVIL FUSION

Key Takeaway

- The PRC pursues its MCF (军民融合) Development Strategy to "fuse" its security and development systems into its Integrated National Strategic System and Capabilities (INSS&C) in support of the PRC's national rejuvenation goals.

The PRC's MCF strategy includes objectives to develop and acquire advanced dual-use technology for military purposes and deepen reform of the national defense S&T industries and serves a broader purpose to strengthen all the PRC's instruments of national power. Beijing's national strategy focuses on specific civilian and military technologies, including AI; quantum information; brain science; biotechnology; clinical medicine; deep space, deep sea, and deep earth technology; and integrated circuits. The PRC is invested in photonics, nanoelectronics, network communications, robotics, and new energy systems.

The PRC's MCF Development Strategy encompasses six interrelated efforts: (1) fusing the PRC's defense industrial base to its civilian technology and industrial base, (2) integrating and leveraging S&T innovations across military and civilian sectors, (3) cultivating talent and blending military and civilian expertise and knowledge, (4) building military requirements into civilian infrastructure and leveraging civilian construction for military purposes, (5) leveraging civilian service and logistics capabilities for military purposes, and (6) expanding and deepening the PRC's national defense mobilization system to include all relevant aspects of its society and economy for use in competition and war.

The CCP's leaders view MCF as a critical element of their strategy for the PRC to become a "great modern socialist country," which includes becoming a world leader in S&T and developing a "world-class" military.

Although the PRC's MCF strategy includes objectives to develop and acquire advanced dual-use technology for military purposes and deepen reform of the national defense S&T industries, its broader purpose is to strengthen all the PRC's instruments of national power by melding aspects of its economic, military, and social governance. MCF strives to establish an infrastructure that connects the military and civilian sectors as a catalyst for innovation and economic development, yields an effective unity of effort in advancing dual-use technologies, especially those suited for "intelligentized" warfare, and facilitates effective industrial mobilization during wartime.

The PRC's 13th and 14th FYPs call for the mechanization, informationization, and intelligentization of key civilian and military technologies, including AI; quantum information; brain science; biotechnology; clinical medicine; deep space, deep sea, and deep earth technology; and integrated circuits. The PRC announced plans to build more state labs for research on photonics, nanoelectronics, network communications, robotics, and new energy systems. PRC leaders prioritize development and integration of state-level laboratories, both civilian and defense, as an integral part of the National Strategic S&T Enterprise and MCF strategy.

The PRC seeks to achieve a "state of deep MCF development" in the near term, specifically focusing on improving the PRC's industrial ecosystem. As such, the CCP has continued to elevate MCF's importance. In 2015, the CCP Central Committee elevated the MCF Development Strategy to a national-level strategy serving as a bridge between the PRC's national development strategy and its national security strategy, later adding building "integrated national strategic systems and capabilities" (一体化的国家战略体系和能力), which support the PRC's goal of national rejuvenation.

The elevation of MCF Development Strategy was followed by the establishment of the Central Commission for Military Civilian Fusion Development (CCMCFD) in 2017, chaired by General Secretary Xi Jinping, Premier Li Qiang, several other members of the Politburo Standing Committee, two State Councilors, both CMC Vice Chairmen, 12 Ministry-level leaders, and others. The stated objective of the CCMCFD is to build the PRC's "national strategic system and capabilities." This commission works to improve the "top-level design" of MCF and overcome impediments to implementation. The elevation of the MCF Development Strategy and the creation of the CCMCFD signals the importance that CCP leaders place on MCF and the scope and scale of the strategy's ambitions. As a national-level organ, the CCMCFD is endowed with sufficient authority to break through bureaucratic barriers in the pursuit of implementing MCF.

Since early 2022, the CCP appears to have been deemphasizing the term MCF in public, in favor of "integrated national strategic systems and capabilities." This term appears to have originated in June 2017 when Xi addressed the first meeting of the Central Committee's Central Commission for Military-Civil Fusion Development and charged them with gradually building up "China's integrated national strategic systems and capabilities." Xi used "integrated national strategic systems and capabilities" in conjunction with "military-civilian fusion" in his 2017 speech to the 19th Party Congress, suggesting that completion of major projects, achievements in defense

research, and improved MCF would contribute to building the PRC's overarching integrated national strategic systems and capabilities.

Xi's work report to the 20th Party Congress in October 2022 omitted any mention of MCF, only calling for "consolidating and enhancing integrated national security strategies and capabilities," and then addressing many of the components traditionally associated with MCF. This same formulation was used in March 2023 by Xi and CMC Vice Chairman Zhang Youxia in their separate addresses to PLA and PAP delegates to the 14th NPC. Provincial party officials responsible for MCF were already publicly using the phrase "integrated national strategic systems and capabilities" and avoiding the term MCF in the months leading up to the 20th Party Congress.

The Second Session of the March 2024 NPC reaffirmed the PLA's commitment to military-civilian integration and modernization milestones. The PLA is preparing for a "revolution in military affairs," a concept describing modern battlefield conditions and conflict domains across the digital and physical landscape. The CCP believes dual-use technologies, including those outlined in the 14th FYP, are necessary to achieve victory in modern warfare.

Artificial Intelligence. The PRC is prioritizing the development of AI-enabled capabilities because of its belief that AI is leading to the next revolution in military affairs. To actualize the level of AI integration that the PLA is envisioning, Beijing recognizes the need to leverage developments from across its commercial and academic sectors. By 2030, the PLA expects to field a range of "algorithmic warfare" and "network-centric warfare" capabilities operating at different levels of human-machine integration. CCP leaders believe AI and machine learning will enhance information, surveillance, and reconnaissance capabilities and enable a range of new defense applications, including autonomous and precision-strike weapons.

The PRC is invested in autonomous vehicles, predictive maintenance and logistics, and automated target recognition. The PLAN is interested in unmanned underwater vehicles, similar to the PRC's commercial unmanned boats. The PLA plans to use AI and machine learning to enhance missile sensors, which may make those missiles more accurate. Major General Hu Xiaofeng, a PLA National Defense University (NDU) professor, recommended using generative AI software for wargames and training operations. The PLA and other defense organizations have hosted AI competitions and used public purchasing platforms to improve military access to civilian AI research and capabilities in areas such as AI-enabled unmanned vehicles, image and object recognition, and intelligent decision support.

Quantum. The PRC defense industry and universities are developing quantum imaging, navigation, and radar applications to enhance intelligence, surveillance, and reconnaissance (ISR) capabilities, including position, navigation, and timing (PNT). PLA leaders view quantum sensing capabilities as tools to improve submarine detection. Judging from the build out of the PRC's quantum communication infrastructure, the PLA may leverage integrated quantum networks and quantum key distribution to reinforce command, control, and communications systems.

Biotechnology. Biotechnology is another core component of the PRC's modernization objectives, driving commercial and military innovation throughout the bioeconomy. The PRC's 14th FYP for Bioeconomy Development identifies DNA sequencing, gene editing, and synthetic biology as examples of cutting-edge biotechnology. The PLA's medical institutions have emerged as major centers for research in gene editing and other new frontiers of biotechnology. In 2016, the PRC

instituted the China Brain Project (2016–2030) to understand cognitive functions and neural pathways. The project focuses on R&D of various dual-use technologies, including brain-computer interfaces (BCI), an emerging technology which enables humans and computers to exchange information through devices implanted in the brain or placed on the skull. Noninvasive BCI devices are available for a variety of commercial applications, including remote control of devices and emotion detection. PLA scientists have investigated a variety of military applications of brain research, such as improved mental agility, mobility, physical safety, and situational awareness of combatants. The PLA is exploring a range of "neurocognitive warfare" capabilities that exploit adversaries using neuroscience and psychology.

The PRC pursues MCF through six interrelated efforts. Each effort overlaps with the others and has domestic and international components. The CCP seeks to implement the MCF Development Strategy across every level of the PRC from the highest national-level organs down to provinces and townships, creating top-down financing and regulatory mechanisms to incentivize civilian and military stakeholders—such as local governments, academia, research institutions, private investors, and military organizations—to combine efforts on dual-use technologies. The PRC refers to these six aspects as "systems," which may be understood as mutually supporting lines of effort or components.

The Advanced Defense Science, Technology, and Industrial system focuses on fusing the PRC's defense industrial base and its civilian technology and industrial base. This includes expanding the private sector's participation in the PRC's defense industrial base and supply chains as well as improving the efficiency, capacity, and flexibility of defense and civilian industrial and manufacturing processes. This broader participation seeks to transfer mature technologies across military and civilian sectors to produce outsized benefits for both. This system aims to increase competitiveness in the PRC's defense industrial base in which one or two defense state-owned enterprises (SOEs) dominate an entire sector. This MCF system seeks to advance the PRC's self-reliance in manufacturing key industrial technologies, equipment, and materials to reduce its dependence on imports, including those with dual uses. The PRC's MCF-influenced industrial and technology endeavors include "Made in China 2025," which sets targets to achieve greater self-sufficiency in key industrial areas, such as aerospace, communications, and transportation.

The MCF Coordinated Technology Innovation system seeks to maximize the full benefits and potential of the country's S&T development. Consistent with the CCP leadership's view that high technology and innovation are critical to strengthening the PRC's CNP, this system develops and integrates advanced technologies across civilian and military entities, projects, and initiatives—with benefits flowing in both directions. This system includes using cutting-edge civilian technology for military applications or more broadly advancing military S&T as well as using military advancements to push civilian economic development. Although related to the Advanced Defense Science, Technology, and Industrial System, this system largely focuses on fusing innovations and advances in basic and applied research. Specific efforts in this MCF system include strengthening and promoting civilian and military R&D in advanced dual-use technologies and cross-pollinating military and civilian basic research. Additional efforts include promoting the sharing of scientific resources, expanding the institutions involved in defense research, and fostering greater collaboration across defense and civilian research communities. This system seeks to foster "new-type" research institutions with mixed funding sources and lean management structures that are more dynamic, efficient, and effective than the PRC's wholly state-owned

research bodies. Examples of MCF-influenced dual-use S&T endeavors include the PRC's Innovation Driven Development Strategy and Artificial Intelligence National Project.

The Fundamental Domain Resource Sharing system includes building military requirements into the construction of civilian infrastructure from the ground up as well as leveraging the PRC's civilian construction and logistics capacities and capabilities for military purposes. This system factors military requirements and dual-use purposes into building civilian private and public transportation infrastructure, such as airports, port facilities, railways, roads, and communications networks. This extends to infrastructure projects in dual-use domains, such as space and undersea, as well as mobile communications networks and topographical and meteorological systems. Another element seeks to set common military and civilian standards to make infrastructure easier to use in emergencies and wartime. This aspect of MCF has arguably the greatest reach into the PRC's local governance systems as military requirements inform infrastructure construction at the province, county, and township levels. The influence of this aspect of MCF is visible in the PRC's major land reclamations and military construction activities in the SCS, which brought together numerous government entities, the PLA, law enforcement, construction companies, and commercial entities. It may have important implications for the PRC's overseas infrastructure projects and investments under BRI as the PRC seeks to establish a more robust overseas logistics and basing infrastructure to allow the PLA to project and sustain military power.

The Military Personnel (Talent) Cultivation MCF system seeks to blend and cultivate military and civilian S&T expertise through education programs, personnel exchanges, and knowledge sharing. The purpose of this effort is to improve the use of experts able to participate in S&T projects irrespective of whether they are military or civilian (or foreign) experts and enables expertise to flow more freely across sectors. This aspect of MCF seeks to reform the PRC's talent cultivation system, which encompasses hundreds of talent recruitment plans, to improve the PRC's human capital, build a highly skilled workforce, and recruit foreign experts to provide access to know-how, expertise, and foreign technology. It considers all levels of education from the CCP's nationwide "patriotic education" programs for children to the matriculation of post-doctorate researchers in the PRC and at institutions abroad. Many of the PRC's named talent programs are likely influenced by MCF planning as are reforms in its military academies, national universities, and research institutes.

The PLA Socialized Support and Sustainment system entails two major efforts to shift the PLA away from its inefficient self-contained logistics and sustainment systems toward modern streamlined logistics and support services. First, it seeks to harness civilian public sector and private-sector resources to improve the PLA's basic services and support functions—ranging from food, housing, and healthcare services. The concept is to gain efficiencies in costs and personnel by outsourcing non-military services previously performed by the PLA while improving the quality of life for military personnel. Second, it seeks to further the construction of a modern military logistics system that can support and sustain the PLA in joint operations and for overseas operations. This system seeks to fuse the PLA Joint Logistic Support Force's (JLSF's) efforts to integrate the military's joint logistics functions with the PRC's advanced civilian logistics, infrastructure, and delivery service companies and networks. These arrangements seek to provide the PLA with modern transportation and distribution, warehousing, information sharing, and other types of support in peacetime and wartime. This fusion also seeks to provide the PLA with a more efficient, higher capacity, and higher quality logistics system with global reach.

The National Defense Mobilization MCF system binds the other systems as it seeks to mobilize the PRC's military, economic, and social resources to defend or advance PRC sovereignty, security, and development interests. The CCP views the PRC's growing strength as useful only to the extent that the party-state can mobilize it. The PRC characterizes mobilization as the ability to use precisely the instrument, capability, or resource needed, when needed, for the duration needed. In the PLA, 2015–2016 reforms elevated defense mobilization to the National Defense Mobilization Department (NDMD), which reports directly to the CMC. The NDMD plays an important role in this system by organizing and overseeing the PLA's reserve forces, militia, and provincial military districts and below. This system seeks to integrate the state emergency management system into the national defense mobilization system in order to achieve a coordinated military-civilian response during a crisis. Consistent with the CCP's view of international competition, many MCF mobilization initiatives not only seek to reform how the PRC mobilizes for war and responds to emergencies but how to leverage the economy and society to support the PRC's strategic needs for international competition.

Each MCF system entails linkages between dozens of organizations and government entities, including the following:

- *Ministry-level organizations from the State Council:* The National Development and Reform Commission, Ministry of Foreign Affairs, Ministry of Science and Technology, Ministry of Industry and Information Technology, Ministry of Education, and key state entities, such as the State Administration of Science, Technology, and Industry for National Defense.

- *Lead military organs subordinate to the CMC*: S&T Commission; CMC Strategic Planning Office, Joint Political, Logistics, and Equipment Development Departments (EDD) as well as operational units and the regional military structure at the military district and sub-district levels and military universities and academies, such as NDU, Academy of Military Science, National University of Defense Technology, and service institutions.

- *State-sponsored educational institutions, research centers, and key laboratories*: Prominent examples include the "Seven Sons of National Defense" (Harbin Institute of Technology, Nanjing University of Science and Technology, Northwestern Polytechnical Institute, Beijing Institute of Technology, Harbin Engineering University, Beijing University, Nanjing University of Aeronautics and Astronautics) as well as certain PLA-affiliated laboratories of Tsinghua University, Beijing University, and Shanghai Jiaotong University, North University of China, and others.

- *Defense industry*: The 10 major defense SOEs continue to fill their traditional roles providing weapons and equipment to the military services. Many defense SOEs consist of dozens of subsidiaries, subcontractors, and subordinate research institutes.

- *Other SOEs and quasi-private companies*: High profile examples include PRC high-tech corporations and important SOEs like COSCO, China National Offshore Oil Company, and major construction companies that have roles in BRI projects as well as helping the PRC build out occupied terrain features in the SCS.

- *Private companies:* MCF efforts also seek to increase the proportion of private companies that contribute to military projects and procurements. These enterprises include technology companies that specialize in unmanned systems, robotics, artificial intelligence, cybersecurity, and big data.

- *Multi-stakeholder partnerships*: In practice, many MCF efforts involve partnerships between central, provincial, or city government entities with military district departments, PLA departments, academia, research entities, and companies. Most provincial and local governments have announced MCF industrial plans and more than 35 national-level MCF industrial zones have been established across the PRC. MCF-linked investments funds created by central and local governments and private investors total in the tens of billions of dollars.

THE PRC'S DEFENSE POLICY AND MILITARY STRATEGY

Key Takeaways

- In 2023, the PRC's stated defense policy aims remained oriented toward advancing its sovereignty, security, and development interests while emphasizing a greater global role for itself.

- PRC leaders stress the imperative of strengthening the PLA into a "world-class" military by the end of 2049 as an essential element of its strategy to rejuvenate the PRC into a "great modern socialist country."

PRC leaders continue to demonstrate a growing willingness to use military coercion and inducements to achieve its defense policy aims. PRC leaders cast the armed forces as a practical instrument to defend the PRC's expanding global interests and to advance its foreign policy goals in the framework of "Great Power Diplomacy with Chinese characteristics."

In 2020, the PLA added a new milestone for modernization in 2027: to accelerate the integrated development of mechanization, informatization, and intelligentization of the PRC's armed forces, which, if realized, could give the PLA capabilities to be a more credible military tool for its Taiwan unification efforts.

The PLA's "core operational concept," Multi-Domain Precision Warfare (MDPW), is intended to leverage a command, control, communications, computers, intelligence, surveillance, and reconnaissance (C4ISR) network that incorporates advances in big data and AI, what the PLA calls the "network information system-of-systems," to rapidly identify key vulnerabilities in the U.S. operational system and then combine joint forces across domains to launch precision strikes against those vulnerabilities.

The PRC has stated its defense policy aims to safeguard its national sovereignty, security, and development interests. PRC leaders view these interests as foundational to their national strategy. The modernization of the armed forces is an indispensable element of the CCP's national strategy to modernize the country. The PRC's defense policy and military strategy primarily orients the

PLA toward "safeguarding" its perceived "sovereignty and security" interests in the region while countering to the United States.

To adapt the PRC's armed forces to long-term trends in global military affairs and meet the country's evolving national security needs, PRC leaders stress the imperative of meeting key military transformation targets set for 2027 and 2035. These milestones seek to align the PLA's transformation with the PRC's overall national modernization so that, by the end of 2049, the PRC will field a "world-class" military. In March 2023, Xi issued a series of calls to accelerate the build-up of self-reliance in S&T, make supply chains more resilient, and bolster national reserves to be "more capable of safeguarding national security." Defense S&T has been crucial in the PRC's technological innovation. Institutional reform in the PRC's national S&T enterprise will drive national defense modernization.

A key driver of the PRC's defense policy is how PRC leaders perceive the relative threats and opportunities facing the country's comprehensive national development. During Chairman Xi's CCP centenary speech, he called for the full implementation of the CCP's idea of strengthening the army in the new era. The last defense white paper, *China's National Defense in the New Era*, published in 2019, reaffirmed that the PRC's armed forces are aligned with and contribute to the strategies of the CCP, stating that ongoing military reforms "ensure absolute leadership of the CCP over the military." According to the paper, Beijing views the international environment as undergoing "profound changes unseen in a century." The CCP concludes that "international strategic competition is on the rise" and expresses deep concerns at what it sees as growing sources of instability in the near term.

Beijing offers no introspection on its role in stirring geopolitical tensions through its economic practices, military activities and modernization, excessive maritime territorial claims, assertive diplomacy, or efforts to revise aspects of global governance. Rather, the PRC describes the international system as being "…undermined by growing hegemonism, power politics, unilateralism and constant regional conflicts and wars." Similarly, the PRC contends that global military competition is intensifying and that "major countries" are adjusting their security and military strategies, reorganizing their militaries, and developing new types of combat forces to "seize the strategic commanding heights in military competition."

The PRC's stated defense policy is to "resolutely safeguard" its sovereignty, security, and development interests, according to its 2019 defense white paper, which provides continuity with past statements by PRC senior leaders and other official documents. In practice, the PRC's military power is increasingly a central feature of the CCP's regional and global ambitions. The 2019 defense white paper identifies the PRC's national defense aims that support these interests, in likely order of importance:

- Deter and resist aggression.
- Safeguard national political security, the people's security, and social stability.
- Oppose and contain "Taiwan independence."
- Crack down on proponents of separatist movements, such as "Tibet independence" and the creation of "East Turkistan."

- Safeguard national sovereignty, unity, territorial integrity, and security.
- Safeguard the PRC's maritime rights and interests.
- Safeguard the PRC's security interests in outer space, the electromagnetic spectrum, and cyberspace.
- Safeguard the PRC's overseas interests.
- Support the sustainable development of the country.

Key changes in defense policy for the "New Era" include efforts to improve coordination across the party-state to leverage all organs of national power in a unified approach to support the CCP's ambitions of a global military capability. Unlike previous defense white papers, *China's National Defense in the New Era* explicitly stressed the PRC's armed forces' alignment and support to the CCP's broader societal and foreign policy objectives. The white paper states that the PRC's armed forces must be ready to, "provide strong strategic support for the realization of the Chinese Dream of national rejuvenation, and to make new and greater contributions to the building of a shared future for mankind." Also notable is the explicit alignment between the PRC's defense and foreign policies, particularly in the armed forces' role in protecting the PRC's overseas interests and furthering the CCP's concept of "strategic partnerships" with other countries.

The Chairman of the CMC issues military strategic guidelines to the PLA as the foundation of the PRC's military strategy. The military strategic guidelines set the general principles and concepts for the use of force in support of the CCP's strategic objectives, offer guidance on the threats and conditions the armed forces should be prepared to face, and set priorities for planning, modernization, force structure, and readiness. The CCP leadership issues new military strategic guidelines or adjusts existing guidelines whenever they perceive it necessary to shift the PLA's priorities based on the CCP's perceptions of the PRC's security environment or changes in the character of warfare.

Since 2019, trends indicate the PRC has reviewed and adjusted its military strategic guidelines. In early 2019, PRC state media indicated that Beijing held senior-level meetings to "establish the military strategy of the 'New Era.'" The PRC's 2019 defense white paper states that the PLA is implementing guidelines for the "New Era" that, "…actively adapt to the new landscape of strategic competition, the new demands of national security, and new developments in modern warfare…" Documents released following the Fifth Plenum of the 19th Central Committee in October 2020 hailed progress in the "comprehensive and in-depth" implementation of the "New Era military strategic guidelines."

These developments are notable because the CCP leadership has issued new military strategic guidelines or adjusted its guidelines only a few times since the end of the Cold War. In 1993, the CMC under Jiang Zemin directed the PLA to prepare to win "local wars" under "high-tech conditions" after observing U.S. military operations in the Gulf War. In 2004, the CMC under Hu Jintao ordered the military to focus on winning "local wars under informationized conditions." In 2014, the CMC placed greater focus on conflicts in the maritime domain and fighting "informatized local wars."

The PRC's military strategy is based on what it describes as "active defense," a concept that combines the principles of strategic defense with offensive action at the operational and tactical levels. Active defense is neither a purely defensive strategy nor limited to territorial defense. Active defense encompasses offensive and preemptive aspects. It can apply to the PRC acting externally to defend its interests. Active defense is rooted on the principle of avoiding initiating armed conflict but responding forcefully if challenged. The PRC's 2019 defense white paper reaffirmed active defense as the basis for its military strategy.

Contemporary PRC writings describe the tenets of active defense as follows:

- *Adhere to a position of self-defense and stay with striking back*. This describes the basic principle for the use of military force under active defense. The PRC's 2019 defense white paper describes this principle as, "We will not attack unless we are attacked, but we will surely counterattack if attacked." Active defense may entail defensive counterattacks in response to an attack or preemptively striking an adversary that the PRC judges is preparing to attack.

- *Combine strategic defense with operational and tactical offense*. This aspect offers two approaches to warfare influenced by Mao Zedong's notion of using defense and offense in turns. First, active defense may involve offensive campaigns, operations, and tactical actions in support of the strategic defense. These may occur rapidly and along "external lines." Second, it uses strategic defense to weaken the enemy and set the conditions to transition into strategic offense to secure victory. Strategic defense is not equivalent to deterrence but includes deterrence. Strategic defense also includes actions taken after deterrence has failed, such as conventional strikes against an adversary.

- *Take the operational initiative*. This aspect emphasizes the effective use of offensives at the operational and tactical levels, avoiding enemy strengths, and building asymmetric advantages against enemy weaknesses to "change what is inferior into what is superior."

- *Strive for the best possibilities*. This calls for thorough peacetime military preparations and planning based on fighting the most challenging threat under the most complicated circumstances "in order to get the best results." This aspect stresses the importance of setting conditions in advance and suggests it is preferable to be prepared and not fight, than to fight unprepared.

- *The dialectical unity of restraining war and winning war*. This tenet seeks to resolve the dilemma that using too little force may protract a war instead of stopping it while the unconstrained use of force may worsen a war and make it harder to stop. Calling for the "effective restraint of warfare," this tenet seeks to avoid war first through sufficient military preparations and powerful conventional and strategic forces that act in concert with political and diplomatic efforts to "subdue the enemy's troops without fighting." If war is unavoidable, however, this aspect calls for restraining war by taking the "opening move" and "using war to stop war."

- *Soldiers and the people are the source of victory*. This integrates the concept of active defense with the concept of "people's war." People's war comprises subordinate military strategies,

"guerrilla war," and "protracted war," which Mao saw as a means to harness the capacity of China's populace as a source of political legitimacy and mobilization to generate military power. Contemporary PRC writings link "people's war" to national mobilization and participation in wartime as a whole-of-nation concept of warfare.

The CMC directs the PLA to be ready and able to perform specific missions and tasks to support the CCP's strategy and defend the PRC's sovereignty, security, and development interests. The PLA's missions and tasks in the "New Era" include safeguarding the PRC's territorial sovereignty and maritime rights and interests, maintaining combat readiness, conducting military training under real combat conditions, safeguarding the PRC's nuclear weapons and its interests in the space and cyberspace domains, countering terrorism and maintaining stability, protecting the PRC's overseas interests, and participating in emergency response and disaster relief.

In his speech at the 20th Party Congress, Xi detailed the PLA goals of enhancing party loyalty in the military while simultaneously strengthening the military through reform, S&T, personnel training, mechanization, informatization, and modernized military strategies.

In a March 2021 speech, Xi detailed that the 2027 modernization goal is the first step in a broader modernization effort. The PLA's 2027 modernization goal aligns with the 100th anniversary of the PLA's founding. PLA writings note the "three-step" modernization plan connects "near-, medium-, and long-term goals" in 2027, 2035, and 2049, respectively.

The PRC's goals for modernizing its armed forces in the "New Era" are as follows:

- **By 2027**: "Accelerate the integrated development of mechanization, informatization, and intelligentization" while boosting the speed of modernization in military theories, organizations, personnel, and weapons and equipment.

- **By 2035**: "To comprehensively advance the modernization of military theory, organizational structure, military personnel, and weaponry and equipment in step with the modernization of the country and basically complete the modernization of national defense and the military …"

- **By 2049**: "To fully transform the people's armed forces into world-class forces."

The 5th Plenum communique holds that the 2027 goal means that the PRC military should comprehensively push forward the modernization of military theories, military organizational form, military personnel, and weapons and equipment. PRC media, citing a military source, connected the PLA's 2027 goals to developing the capabilities to counter the U.S. military in the Indo-Pacific region and compel Taiwan's leadership to the negotiation table on the PRC's terms.

Although PRC leaders view building military strength as a strategic imperative, they place important caveats on these objectives. For example, Chairman Xi's direction to the PLA to "basically complete" modernization by 2035 should occur "in step with the modernization of the country." These qualifications serve several purposes that highlight the interlocking nature of the CCP's strategic planning. First, as the PRC's interests continue to expand, the CCP expects the PLA to keep pace with the country's evolving interests and be ready and able to defend its progress. Second, linking the PLA's transformation to the country's transformation allows CCP leaders to signal the scope and scale of the internal changes they expect the PLA to implement, particularly

given its historic resistance to reforms that challenge its risk-adverse organizational culture or threaten vested bureaucratic interests. These qualifications provide flexibility to the CCP's leaders to calibrate military resources and defense objectives based on the conditions of the country's overall development. This lets PRC leaders adapt to changing economic or international conditions and ensure military investments support—rather than compromise—the strategy.

The CCP has not defined what it means by its ambition to have a "world-class" military by the end of 2049. Within the context of the PRC's national strategy, however, it is likely that the PRC will seek to develop a military by mid-century that is equal to—or, in some cases, superior to—the U.S. military and that of any other great power that Beijing views as a threat to its sovereignty, security, and development interests. It is unlikely that the CCP would aim for an end state in which the PRC would remain in a position of military inferiority to the United States or any other potential rival. However, this does not mean that the PRC will aim for the PLA to mirror the U.S. military in capacity, capability, or readiness. The PRC will likely seek to develop its "world-class" military in a manner that it believes best suits the needs of its armed forces to defend and advance the country's interests and how the PLA—guided by the CCP—adapts to the changing character of warfare.

The PLA increasingly views warfare as a confrontation between opposing operational systems, rather than annihilation of opposing mechanized military forces. Following this logic, PLA writings refer to systems destruction warfare as the next way of war, transforming from mechanized warfare to an informatized and intelligentized style. Although not a new PLA approach, systems destruction warfare likely continues to be the principal theory guiding its way of war.

In November 2020, the CMC issued the "Chinese People's Liberation Army Joint Operations Outline (Trial)." The outline establishes a system for the PLA's joint operations and focuses on clarifying basic issues regarding the organization and implementation of joint operations, command rights and responsibilities, and the principles, requirements, and procedures for joint operations, combat support, national defense mobilization, and political work. According to PLA writings, the outline describes how the combat style of the PLA will integrate joint operations under the unified command of a joint operations command system. PLA writers emphasize that winning future wars will require a high degree of joint integration of various combat forces and combat elements from across the PLA services and other arms and across all domains, with jointness deepened at the operational and tactical levels. The PLA's "operational regulations" were last updated in 1999 and PLA leaders and PLA-affiliated academics have pointed to the lack of updated doctrine, which is out of step with the 2015-era structural command and organizational reforms and an obstacle to advancing the next steps in building a unified joint PLA.

Since the CMC issued the outline, the PLA has launched a force-wide effort to study and implement it, including through joint operations undertaken during exercises. The PLA aims to turn the outline's vision of joint operations into reality by breaking down institutional barriers and standardizing command systems. Along the way, the PLA seeks to identify shortcoming, develop solutions, and facilitate the adoption of modern operational concepts.

Multi-Domain Precision Warfare. In 2021, the PLA began discussing a new "core operational concept," MDPW. MDPW is intended to leverage a C4ISR network that incorporates advances in big data and AI, what the PLA calls the "network information system-of-systems," to rapidly

identify key vulnerabilities in the U.S. operational system and then combine joint forces across domains to launch precision strikes against those vulnerabilities. MDPW is meant to sit atop an "operational conceptual system-of-systems," suggesting the PLA will develop additional subordinate operational concepts and use simulations, war games, and exercises to test, evaluate, and improve these future-oriented operational concepts. The timing of MDPW's appearance in the PRC's updated doctrine and military strategic guidelines suggests that MDPW serves as a connection between them, likely amplifying themes and guidance in both while focusing on the contours of what the PLA must do to win future wars.

PLA writings have long emphasized the importance of joint firepower strikes as a component of large-scale operations. Joint firepower strikes include multiple services combining to use their firepower capabilities to create substantial effect and have been explicitly tied to a Taiwan invasion in PLA writings. During the August 2022 CODEL visit to Taiwan, the PLARF fired multiple ballistic missiles into impact zones in waters around Taiwan, including at least four missiles that overflew Taiwan, which was unprecedented. Also during the 2022 CODEL visit, the PLAA conducted live fire events using the new PCH191 long-range rocket artillery system, which can strike Taiwan from mainland China. The military drills afforded the PLA an opportunity to train simulated joint firepower strike operations.

War Control. PLA strategists' interrelated concepts of "effective control" and "war control" describe a multifaceted effort for controlling the timing, pace, scope, and scale of escalation from peacetime through crisis and war. At the 20th Party Congress as he did at the 19th Party Congress, Xi emphasized the necessity of the PRC being able to execute effective control's basic formulation—"shape our security situation, contain crises and conflicts, and win local wars"—a validation of the concept as national policy, not just PLA theory. PLA writings on war control highlight the importance of avoiding war when possible, ensuring one fights a winnable war, and, if war is unavoidable, seizing the initiative and minimizing the cost and duration. During crisis, war control calls on the PLA to prevent war but seize opportunities—which could inadvertently escalate the crisis. Alongside modernizing the PLA's capabilities and organizational reform, PRC's leaders have identified enhancing the combat readiness of the armed forces as an important element in developing the PRC's military strength. In recent years, Xi and senior military leaders have emphasized the need to evolve how the PLA trains to increase force readiness, focusing on more rigorous and realistic training as well as addressing issues in the PLA's training and education systems relating to conducting complex joint operations and adapting to other aspects of modern warfare. It probably has led to an increasing standardization of a combat readiness system across the PLA to enable the PRC to quickly transition to a wartime posture.

Along with the CCP leadership's focus on improving the PLA's combat readiness, in recent years, PLA media outlets have noted shortcomings in the military's training and education systems that reportedly left some commanders—particularly at the operational level—inadequately prepared for modern warfare. In response to perceived personnel deficiencies in the PLA, Xi approved and issued a new series of regulations in July 2022 regarding the management of PLA soldiers seeking to improve recruiting, training, promotions, benefits, and demobilization efforts for NCOs. In recent years, PLA media outlets have identified the need for the military to address the "Five Incapables" problem: that some commanders cannot (1) judge situations, (2) understand higher authorities' intentions, (3) make operational decisions, (4) deploy forces, and (5) manage unexpected situations. Senior CCP and PLA leaders are keenly aware that the military has not

experienced combat in decades nor fought with its current suite of capabilities and organizational structures. PLA leaders and state media frequently call on the force to remedy the "peacetime disease" that manifests in the form of what it characterizes as lax training attitudes and practices that are viewed as hindering combat readiness.

INFLUENCE OPERATIONS

Key Takeaways

- The creation of the PLA Strategic Support Force (SSF) in 2015 reflected the CCP's understandings of cyber operations as the primary means for psychological manipulation. Even as the SSF was dissolved in 2024 in favor of support forces across the PLA's other military departments, psychological warfare remains prominent in CCP thinking of the military's evolving roles and responsibilities.
- The PLA concept of cognitive domain operations (CDO) combines psychological warfare with cyber operations to shape adversary behavior and decision-making.
- The PLA probably intends to use CDO as an asymmetric capability to deter U.S. or third-party entry into a future conflict or as an offensive capability to shape perceptions or polarize a society.

The PLA views controlling the information spectrum in the modern battlespace as a critical enabler of information dominance early in a conflict. Beginning in the early 2000s, as part of the PRC's overall influence operations, the PLA began developing the "Three Warfares" concept, which calls for the coordinated use of public opinion warfare, psychological warfare, and legal warfare.

- Public opinion warfare creates and disseminates information to guide an adversary's public opinion and gain support from domestic and foreign audiences.
- Psychological warfare uses propaganda, deception, and coercion to induce pressure and affect the behavior of the target audience.
- Legal warfare uses domestic and international laws to shape narratives that advance PRC interests and undermine those of an adversary.

The PLA likely seeks to combine digital influence activities with the "Three Warfares" concept to demoralize adversaries and influence domestic and foreign audiences, creating an environment advantageous to the PRC. Since at least the mid-2010s, the PLA has been incorporating the concept of cognitive warfare or CDO into PLA frameworks for conducting influence operations. While the concept of cognitive warfare appears to be a PLA specific, overall PRC influence operations reflect a whole-of-government approach to shaping the information environment.

From the PRC's perspective, all nations—especially the United States—that use digital narratives to undermine the CCP's authoritarian system and employ offensive influence operations. Hence, the PRC considers its influence operations that counter this perceived subversion as defensive to protect the party and the military.

Another primary goal of the PRC's influence operations is to maintain domestic stability and protect CCP rule. Domestically, the CCP uses influence activities to protect its image with the public and garner popular support for the military. Internationally, Beijing aims to create an information environment favorable to the PRC and its strategic foreign policy objectives. PRC influence operations target media organizations, businesses, academic and cultural institutions, and policy communities of the United States, other countries, and international organizations to achieve outcomes favorable to its strategic and military objectives.

CDO. The creation of the PLA SSF in 2015 reflected that the CCP understands cyber operations as the primary means for psychological manipulation. As the PLA seeks to expand the reach of its influence operations around the world and seize information dominance on the battlefield, it is researching and developing what it believes to be the next evolution of psychological warfare, which it calls CDO. CDO blends previous PRC concepts, such as public opinion guidance and psychological warfare, with modern internet technologies and communication platforms and is designed to achieve strategic national security goals by affecting a target's cognition to change the target's behavior and decision-making. The PLA has recognized the importance of incorporating emerging technologies, such as AI, big data, brain science, and neuroscience into CDO as the PLA perceives that these technologies will lead to profound changes in the ability to subvert human cognition.

The goal of CDO is to achieve what the PLA refers to as "mind dominance," which the PLA defines as the use of information to influence public opinion to affect change in a nation's social system, likely to create an environment favorable to the PRC and reduce civilian and military resistance to PLA actions. The PLA probably intends to use CDO as an asymmetric capability to deter U.S. or third-party entry into a potential conflict, or as an offensive capability to shape perceptions or polarize a society. Authoritative PLA documents describe one aspect of deterrence as the ability to bring about psychological pressure and fear on an opponent and force them to surrender. PLA articles on CDO state that seizing mind dominance in the cognitive domain and subduing the enemy without fighting is the highest realm of warfare.

Synthetic Media in CDO. An aspect of cognitive warfare and CDO calls for the use of emerging technologies—such as AI and big data—to enhance operations, including the production and use of deepfakes. Deepfakes are a type of synthetic media where a person in an image or video is swapped with another person's likeness. PLA researchers have been interested in developing this technology since 2011, when National University of Defense Technology researchers proposed using audio-visual technology to imitate voices of foreign senior political and military leadership to mislead adversaries and shape their decision-making process. The researchers identified what they called "voice information synthesis technology" as a key enabling technology to accomplish this, indicating the development of underlying technologies used in deepfakes. In 2018, PLA researchers found that the PLA needed to improve other AI techniques, such as deep learning and natural language processing, to employ voice information synthesis technology to spread content online. In 2020, elements of the PLA had reportedly created a deepfake to mislead the U.S. public. The PLA has identified that using deepfakes presents the PLA with a low cost and quick-to-develop capability to shape the information environment with a low threshold for use in operations.

In 2023, PLA publications argued that cutting-edge generative AI applications, such as large language models, can enhance CDO by increasing the efficiency of creating synthetic media,

including deepfakes. Leading generative AI technologies have greater authenticity and require less human input than previous AI technologies used for deepfake creation. PRC military researchers have complained that the PLA lacks the necessary staff with adequate foreign-language skills and cross-cultural understanding for authentic content generation. Leading generative AI technologies offer a potential technical solution to overcome this deficiency. Numerous PRC institutions, including leading technology companies, such as Baidu, Alibaba, and Huawei, are developing generative AI technologies for capabilities such as text, image, audio, and video creation.

THE PRC'S MILITARY LEADERSHIP

Key Takeaway

- The CMC, the PRC's top military decision-making body, consists of a civilian chair, two vice chairs, the chiefs of the Joint Staff and Political Work Departments, and the head of the Discipline Inspection Commission; CCP General Secretary and PRC President Xi Jinping is currently serving his third term as CMC Chairman.

For a majority of 2023, Li Shangfu served as the PRC's Minster of National Defense before being removed in October 2023 on corruption-related charges. In December 2023, President Xi Jinping selected Adm. Dong Jun as the PRC's new Minister of National Defense. As of May 2024, Dong has yet to be appointed as a CMC member or State Councilor, two positions his predecessor held.

As the military's highest decision-making body, the CMC is technically a department of the CCP Central Committee. The CMC Chairman is a civilian, currently, though not always concurrently serving as the General Secretary of the CCP and President of the PRC. CMC members are appointed at Party Congresses every 5 years. In fall 2022 at the 20th Party Congress, General Zhang Youxia ascended to the first Vice Chairman position, joined by General He Weidong as the second Vice Chairman. Other CMC members include General Liu Zhenli and returning members Admiral Miao Hua and General Zhang Shengmin. General Li Shangfu was appointed to the CMC and, in March 2023, to the position of Minister of National Defense but, in October 2023, Beijing removed Li from his role without explanation, probably because of corruption relating to the PLA's weapons and acquisitions program during his previous role as head of the CMC EDD. At the end of 2023, the CMC consisted of two vice chairs, the chiefs of the Joint Staff and Political Work Departments, and the head of the Discipline Inspection Commission.

Chairman Xi Jinping concurrently serves as the CCP General Secretary, CMC Chairman, and President of the PRC. Xi was first appointed as Party General Secretary and CMC Chairman in 2012 and as President in the spring of 2013. Xi was reappointed to all his positions for an unprecedented third term at 2022's 20th Party Congress and the 2023 NPC. In 2016, Xi was announced as the commander in chief of the CMC's Joint Operations Command Center (JOCC) and was named "core" leader of the CCP Central Committee. Prior to becoming CMC Chairman, Xi served as the CMC's only civilian Vice Chairman under Hu Jintao.

Vice Chairman General Zhang Youxia is the PRC's top uniformed official and former junior vice chairman. Zhang was first appointed to the CMC in 2012 as the head of the General Armaments Department—now the EDD—where he oversaw the PLA's manned space program as well as MCF

and military modernization efforts. Zhang gained rare experience as a combat commander during the PRC's brief war with Vietnam in 1979. Zhang formerly commanded the Shenyang military region, which shares a border with North Korea and Russia. Zhang is one of the PLA's "princelings." His father, a well-known military figure in the PRC, served with Xi's father at the close of Chinese Civil War in 1949. Zhang, age 73 in 2023, was expected to retire following his second CMC term due to previously followed age norms. However, Zhang's retention on the CMC for a third term probably reflects Xi's desire to keep a close and experienced ally as his top military advisor.

Vice Chairman General He Weidong is the PRC's second-most senior uniformed officer and a former commander of the PLA's Eastern Theater. His ascent to a vice chairman position absent prior CMC membership is unusual and probably a testament to his extensive operational experience focused on Taiwan. Before his selection as vice chairman, He served briefly in the CMC JOCC, where he played a key role in planning live-fire drills in the Taiwan Strait as part of the PLA response to the then-U.S. House Speaker's August 2022 visit to Taipei. He may have close ties to Xi due to their overlapping service in Fujian and Zhejiang provinces in the late 1990s and early 2000s.

For a majority of 2023, Li Shangfu served as the PRC's Minster of National Defense before being removed in October 2023 for corruption-related charges (*refer to the Special Topics section for more information on PLA corruption*). General Li Shangfu was appointed to the CMC at the 20th Party Congress in October 2022 and as the Minister of National Defense at the NPC in March 2023. Li previously headed the EDD, where he managed the PLA's weapons development and acquisition efforts and the PRC's manned space program. In 2018, Li was sanctioned by the United States for his role as EDD director overseeing the purchase of Russian fighter jets and surface-to-air missile (SAM) systems.

In December 2023, President Xi Jinping selected Adm. Dong Jun as the PRC's new Minister of National Defense. Adm. Dong Jun is the fifth defense minister to serve under Xi since 2012. Dong is the PLA's third-most senior officer and manages its relationship with state bureaucracies and foreign militaries. Unlike the U.S. Secretary of Defense, he is not part of the chain of command, but instead leads the PLA's international engagement. Dong is the first career naval officer to rise to the role of defense minister and previously had been commander of the PLAN since 2021. Prior to taking command of the service, Dong served as the deputy commander of the PLA's Southern Theatre Command, overseeing operations in the SCS. As of March 2024, Dong has yet to be appointed as a CMC member or State Councilor, two positions his predecessor held.

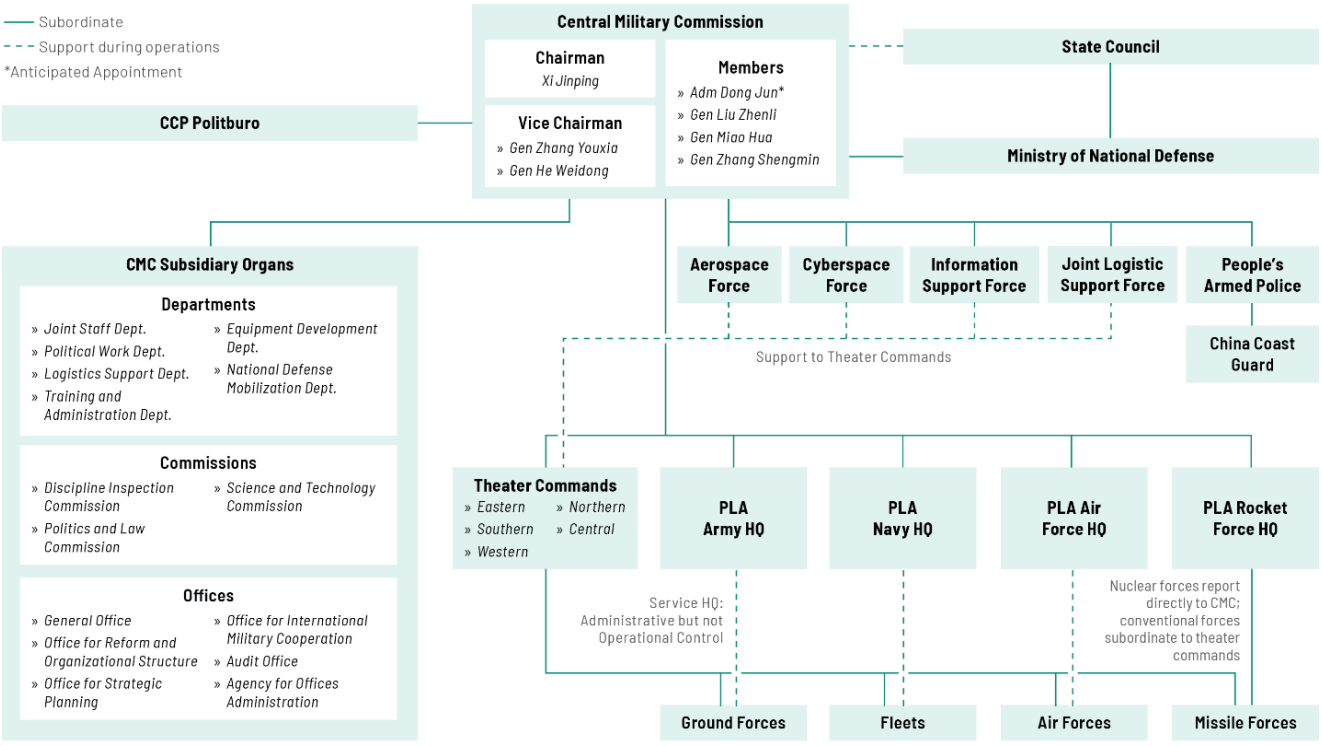
Joint Staff Department Chief General Liu Zhenli oversees PLA joint operations, a narrowing of the wider responsibilities held by the former General Staff Department prior to reforms initiated in 2015. Liu is one of few remaining active-duty PLA officers with combat experience and is recognized as a combat hero for his service in the PRC's border war with Vietnam. Like his predecessor Li Zuocheng, Liu rose through the ranks of the PLAA, assuming command of the service in 2021. Beginning in 2015 as Army chief of staff, Liu guided the service through a major period of reform with ground force downgraded to an equal standing with the other branches. Liu, at age 59 in 2023, is the youngest CMC member.

Political Work Department Director Admiral Miao Hua oversees the PLA's political work, including propaganda, organization, and education. Miao is a former Army officer who switched

services to the Navy in December 2014 when he became political commissar of the PLAN. Miao may have ties to Xi from his time serving in the 31st Group Army (GA) in Fujian Province, when his career overlapped with Xi's. Miao participated as the PLAN political commissar during the Navy's BRI cruise in mid-2017. Miao Hua, at age 67 in 2023, retained his position following the 20th Party Congress.

Secretary of the Discipline Inspection Commission General Zhang Shengmin oversees the highest-level organization responsible for investigating military violations of CCP discipline, including corrupt practices. Zhang is a deputy secretary and third-ranking member on the standing committee of the CCP's Discipline Inspection Commission. Zhang's reappointment reflects the CCP's continued commitment to the anticorruption campaign in the military. Zhang, at age 66 in 2023, remained on the CMC in his current position following the 20th Party Congress.

MILITARY LEADERSHIP AND ORGANIZATION



THE PRC'S NATIONAL SECURITY CONCEPT AND MANAGEMENT

In recent years, the PRC has articulated its view of national security as a broad concept that spans the confluence of internal and external threats to the PRC's interests. CCP leaders have identified national security as encompassing traditional and non-traditional domestic and foreign threats; the intersection of external influences on internal stability; and economic, cultural, societal, and environmental threats. Beijing has taken steps to define a concept for national security; improve the CCP's ability to develop and coordinate national security policy across party, military, and state organs; and raise domestic awareness of national security concerns. These efforts seek to address longstanding concerns of PRC leadership that the country's legacy system of stove-piped party-state organizations is ill equipped to meet the growing national security challenges that the PRC faces.

National Security Concept: The CCP's "Overall National Security Concept" (总体国家安全观), first proposed by Xi in 2014, provides the framework for the PRC's national security system, the mission of the Central National Security Commission (CNSC), and the basis of the PRC's national security strategy. According to the CCP, the premise of the concept is that "The people's security is the purpose of national security, political security is the root of national security, and priority in national interests is the norm of national security." PRC leaders consider people's security, political security, and national interests as mutually reinforcing aspects of national security. CCP outlets describe people's security as the purpose because national security fundamentally must serve the PRC people and nation. Similarly, the CCP's view of political security as the foundation of national security is described in terms of the maintenance and "ruling status" of the CCP and the system of "Socialism with Chinese Characteristics." This reflects the CCP's certainty that its leadership and systems are indispensable to the PRC's national rejuvenation. CCP leaders assess the supremacy of national interests as the criterion or standard by which the CCP expects its stewardship of the PRC's national security will be judged: its ability to "resolutely safeguard" the PRC's sovereignty, security, and development interests. The PRC's concept views development and security as mutually supporting aspects of national security in which "Security guarantees development, and development is the goal of security."

CNSC: To improve coordination on national security matters, the CCP created the CNSC (中央国家安全委员会) in 2013. The CNSC advises the Politburo; oversees the coordination of national security issues across the government; manages crises; fights terrorism, separatism, and religious extremism; and interacts with foreign counterparts. Embracing the CCP's expansive concept of national security, the CNSC's purview covers internal and external national security matters. The CNSC's mission, codification in law, sprawling definition of national security, and powerful leadership has led the CNSC to become an important party-state organ, exemplified by its promulgating regulations in 2021 on the "National Security Work of the CCP" and outlining who, what, and how the CCP will lead national security in the PRC.

CNSC Membership: The PRC's top three leaders lead the CNSC: Xi, who serves as the CNSC Chairman; Li Qiang (Premier of the State Council); and probably Zhao Leji (Chairman of the Standing Committee of the NPC). CNSC membership may include Politburo members, senior government leaders, and senior PLA leaders (including the two Vice Chairmen of the CMC). The CNSC General Office is responsible for the commission's daily work and is run by senior CCP officials serving in dual-

hatted roles in other positions. As of March 2023, the Director of the CNSC General Office likely continued to be Ding Xuexiang, a longtime political aide to Xi. Ding also serves as the Director of the General Office of the Central Committee and is a member of the Politburo Standing Committee. In October 2022, Chen Wenqing was elevated to Secretary of the Central Politics and Law Commission at the 20th Party Congress and is unlikely to stay on at the CNSC where he has served as Deputy Director of the CNSC General Office since 2018.

National Security Strategy: By 2015, the CCP had adopted the PRC's first national security strategy outline following the CNSC's establishment. Official media noted the strategy intends to unify efforts by various departments under the central leadership's guidance. Since 2015, the PRC's leaders and media have indicated national security sub-strategies that cover a variety of issues, including political security, homeland security, military security, economic security, cultural security, societal security, technology security, network security, nuclear safety, ecological security, resource security, and biosecurity. In November 2021, the Politburo deliberated and, soon thereafter, passed the PRC's National Security Strategy (2021–2025) (国家安全战略).

National Security Law: With the establishment of the CNSC and the CCP's adoption of the National Security Strategy, in 2015, the NPC passed the *National Security Law* (国家安全法). This law encapsulated the CCP's overall national security concept and swept a broad range of issues beneath a new legal framework of "national security" while strengthening the formal role of central authorities. In recent years, the NPC has passed a series of laws intended to address more specific national security concerns, including counterespionage (2014, updated in 2023), counterterrorism (2015), cybersecurity (2016), foreign non-governmental organizations in the PRC (2016), intelligence (2017), cryptography (2019), and the coast guard (2021). While these laws address more specific national security concerns, they remain sweeping in scope and authorities.

In an effort to raise public awareness of the CCP's national security concepts and emphasize national security as a civic responsibility, the 2015 *National Security Law* designated April 15 of each year as National Security Education Day. Indicating the reach and depth the CCP desires its national security concepts to penetrate the party-state, the 2015 *National Security Law* made provincial, autonomous regions, and municipalities responsible for national security work in their administrative areas. This has led to the creation of national security committees in the CCP's provincial-level organizations, each headed by the province's party chief.

CHAPTER TWO: PLA FORCES AND CAPABILITIES

THE PLA'S MODERNIZATION AND REFORM

The PRC maintains its goal to achieve a fully modernized national defense and military force by 2035 and for the PLA to become a world-class military by 2049. The force is progressing toward its 2027 benchmark of military modernization that aligns with the 100th anniversary of the PLA's founding on August 1, 1927. The 2027 benchmark, introduced in late 2020 as leaders discussed the 14th FYP (2021–2025), represents the start of the new three-step development strategy. The original three-step modernization strategy sought to achieve mechanization by 2020; modernization of military theory, organization, personnel, and equipment by 2035; and become a world-class force by mid-century. With basic mechanization considered achieved in 2020, the 2027 goal is a short-term marker and represents a modification, not a compression in timeline, for the PRC's ambition to achieve complete military modernization of the PLA by 2035. The PLA centenary goal set by the CCP accelerates the integrated development of mechanization, informatization, and intelligentization and fielding of a combat-ready force with improved strategic capabilities to defend national sovereignty, security, and development interests by 2027.

Key Takeaways

- The PLA has sought to modernize its capabilities and improve its proficiencies across all warfare domains to become a joint force able to conduct the full range of land, air, and maritime as well as nuclear, space, counterspace, electronic warfare (EW), and cyberspace operations.
- The PLA's evolving capabilities and concepts continue to strengthen the PRC's ability to "fight and win wars" against a "strong enemy" (referring to the United States), counter an intervention by a third party in a conflict along the PRC's periphery, and project power globally.
- In 2023, the PLA continued to adjust its military structures, field modern indigenous systems, build readiness, and strengthen its competency in joint operations.

The PLA is the world's largest active-duty military force and comprised of approximately 2.035 million active, 510,000 reserve, and 500,000 paramilitary personnel for a total force of 3.045 million.[1] In efforts to create a leaner, more mobile force, the PLAA has steadily reduced active-duty personnel in the last three decades but still outnumbers other services with 965,000 soldiers in 2023. In 2023, the PLAA transferred three brigades (BDEs) to the PLAN Marine Corps (PLANMC). The addition of these three BDEs, supplemented by previous additions

[1] These figures, which are smaller than those in last year's report, reflect a reversion to a previous methodology, not an assessed change in the size of the PLA.

of aviation and special forces BDEs, brings the PLANMC up to a total of 11 BDEs. These BDEs provide improved expeditionary force capabilities to the PLANMC.

Weaknesses and Deficiencies. The PLA regularly identifies shortcomings in the force's warfighting and command capabilities in official media. These critiques guide its modernization efforts. Despite its rapid progress, the force has not yet demonstrated the type and scale of sophisticated urban warfare or long-distance logistics capabilities that would likely be required for operations against Taiwan or major contingencies overseas. The way that leaders critique officers suggest challenges with decentralized command. One prominent example is the "Five Incapables" slogan the PLA uses to highlight pitfalls for the officer corps to avoid. The slogan critiques officers who cannot judge situations, understand higher authorities' intentions, make operational decisions, deploy troops, or deal with unexpected situations. The PLA is targeting modernization efforts to address some of these challenges. In 2021, the PLA announced a new training system with the goal of improving exercise realism and developing officers capable of operating in a joint environment.

PEOPLE'S LIBERATION ARMY ARMY (PLAA)

Key Takeaways

- The PLAA continues to modernize equipment and focus on combined arms and joint training to meet the goal of becoming a world-class military by 2049.
- The PLAA has continued to demonstrate long-range joint fires capability, such as during the April 2023 JOINT SWORD exercise in response to Taiwan's President Tsai Ing-wen's meeting with the U.S. Speaker of the House.

Service PLAA Roles and Missions. As the primary ground force in the PLA, the PLAA plays a key role in maintaining the PRC's national sovereignty, security, and development interests. The PLAA is tasked with transitioning from a regional defense to a global combat force, capable of multi-dimensional, trans-theater, multi-functional, sustained operations.

PLAA Structure and Organization. The PLAA has approximately 965,000 active-duty personnel in its service. The PLAA is organized into five Theater Army Commands, the Xinjiang Military District, and the Tibet Military District. The PLAA has 13 group armies, which comprise multiple combined-arms BDEs that serve as the PLAA's primary maneuver force. The BDEs vary in size and composition. The PLAA delineates its combined-arms BDEs into three types: light (high-mobility, mountain, air assault, and motorized), medium (wheeled armored vehicles), and heavy (tracked armored vehicles and amphibious variants), with sizes ranging from approximately 4,500 to 5,000 personnel. Each GA controls six additional BDEs responsible for operational element functions: an artillery BDE, an air defense BDE, an army aviation (or air assault) BDE, a SOF BDE, an engineer and chemical defense BDE, and a sustainment BDE; however, some variations exist with at least one GA per theater separating its engineering and chemical defense BDEs into separate units. Although the PLAA has standardized its GAs, it does retain nonstandard divisions and BDEs that exist outside of the GAs. These units are typically located in areas the CCP considers sensitive, including Xinjiang, Tibet, Hong Kong, and Beijing. The PLAA

commands border and coastal defense BDEs under the Theater Army Commands and regiments under the Xinjiang and Tibet Military Districts.

PLAA Capabilities and Modernization. To meet the stated ambitions to become a "world-class" military, the PLAA continues systems modernization and combined arms and joint training. However, it still employs a mix of modern and legacy military equipment. The PLAA continues focusing training on fighting as combined arms formations while adapting to the twice-yearly conscript induction change.

The PLAA's 15 SOF BDEs provide GA commanders with an organic unit capable of executing special operations. Typical PLAA SOF BDE missions include raids, harassment operations, target seizure and control, special reconnaissance, precision strike guidance, and rescue operations. The PLA continues to prioritize SOF for modernization with the fielding of the new QBZ-191 military service rifle and the CSK-series of vehicles. Observed SOF training has included airborne parachuting, small unit tactics, and maritime operations.

PLAA Aviation and Air Assault units remained a focus of development in 2023. PLAA training events and reports in PRC media show that support to amphibious operations, multi-dimensional assaults, developing close air support tactics, and manned-unmanned teaming are now a standard part of training. Training included numerous examples of helicopters executing nighttime flight operations, over water maneuver, and ultra-low altitude flying. PLAA Aviation works with ground units to enhance its ability to support air assault operations and conduct air strikes. PLAA Aviation continued to refine the capability to operate onboard PLAN and commercial vessels. The two PLAA Air Assault BDEs trained extensively on helicopter insertion, area security, and aerial reconnaissance. The PLAA envisions its aviation and air assault units employing their three-dimensional maneuver, firepower, and assault capabilities to act as a main combat force, support a greater joint operation, or conduct non-war military operations outside the PRC.

PLAA air defense units in 2023 continued to improve their tactical air defense against low and slow threats like UAS and loitering munitions to meet evolving air defense requirements. Hybrid self-propelled air defense artillery systems, gun air defense artillery, small focused EW systems, and MANPADs form the core of the PRC's evolving solution to countering tactical UAS. One of the systems with high counter UAS potential being fielded to light combined arms BDEs is armed with a six-barreled, 25-mm rotary cannon, which possibly uses Programmable Timed Fuse Pre-Fragmented rounds and mounts four FN-16 MANPADS on its turret.

The PLAA has continued to emphasize the fielding and application of modern EW capabilities designed to maximize a unit's combat effectiveness to detect, degrade, and disrupt adversary command and control (C2) communications and an adversary's ability to use its tactical ISR systems. Similar to the combined arms BDE's fielding of EW capabilities, the PLAA's air defense forces continue to field new counter-air electronic attack capabilities to complement traditional air defense and support the PLA-wide anti-access, area-denial (A2AD) mission.

PLAA Readiness. The PLAA continued to improve its methods and standards of training combined arms units. Training encompassed individual to collective soldier events integrating reconnaissance, infantry, artillery, armor, engineers, and signal units. In addition to continued PLAA deployments to the Indian border and Burma, the PLAA conducted multiple large-scale exercises in training areas throughout the country.

In April 2023, the PLA executed the JOINT SWORD exercise following Taiwan's President Tsai Ing-wen's meeting with the U.S. Speaker of the House. According to reports, the PCH-191 rocket launcher of the Army of the Eastern Theater Command (ETC) performed an exercise mission in the camp area/position of Xinshadi Village, Shishi City, Quanzhou, Fujian Province, and was loaded with 300 mm rockets. The PCH-191's use in the August 2022 U.S. CODEL visit and the 2023 JOINT SWORD exercise show the important role the system is expected to play in joint fires during a Taiwan campaign. In November of 2023, the PRC hosted the Peace and Friendship-2023 [Aman Youyi-2023] military exercises with five ASEAN countries. The multinational exercises were primarily focused on counterterrorism and anti-piracy.

MAJOR GROUND UNITS



PEOPLE'S LIBERATION ARMY NAVY (PLAN)

Key Takeaways

- Numerically, the PRC has the largest navy in the world with a battle force of over 370 ships and submarines, including more than 140 major surface combatants. The PLAN is largely composed of modern multi-mission ships and submarines.
- The PLAN is continuing construction of RENHAI class guided-missile cruisers (CG), LUYANG III MOD class guided-missile destroyers (DDG), and JIANGKAI II MOD and JIANGKAI III classes of guided-missile frigates as of the first half of 2024.
- A fourth YUSHEN (Type 075) class amphibious assault ship (LHA) is outfitting as of early 2024 and will begin sea trials in late summer. The PLAN began constructing the new YULAN class (Type 076) LHA in early 2024, which will be fitted with an electromagnetic catapult for UAVs.
- In 2022, the PLAN launched its third aircraft carrier, CV-18 *Fujian*, which began sea trials in mid-2024 and is expected to enter operational service in 2025.
- In the near term, the PLAN will have the ability to conduct long-range precision strikes against land targets from its submarine and surface combatants using land-attack cruise missiles (LACMs), notably enhancing the PRC's power projection capability.
- The PRC continues to challenge foreign military activities in its maritime zones in a manner inconsistent with customary international law in the UNCLOS. The PLAN conducts activities in the EEZs of other countries, including the United States, Australia, the Philippines, Vietnam, and Malaysia.
- In 2023, two PRC icebreakers and one cargo vessel conducted the 40th PRC Antarctic research expedition with a key task of building its fifth research station in Antarctica.
- In 2023, the PLAN continued to grow its ability to perform missions beyond the First Island Chain (FIC) by conducting the first extended area deployment of its new YUSHEN-class LHA and carrying out three deployments with CV-17 *Shandong* to the Philippine Sea, a record number for any PLAN carrier in a calendar year.

Numerically, the PRC has the largest navy in the world with a battle force of over 370 ships and submarines, including over 140 major surface combatants. The PLAN is largely composed of modern multi-mission ships and submarines. As of mid-2024, the PLAN is outfitting the 9th and 10th RENHAI CG units. As many as 10 LUYANG III MOD DDGs are in various stages of construction, outfitting, or sea trials. The first two JIANGKAI III FFGs will conduct sea trials during summer 2024. The PRC will build more of these units as well as the smaller and less capable JIANGKAI II MOD FFG, at least two of which are under construction as of mid-2024. The PLAN is outfitting a fourth YUSHEN LHA which launched in late 2023 and will likely begin sea trials in the second half of 2024. The PLAN began construction on the new YULAN class (Type 076)

LHA by early 2024, which is expected to be fitted with an electromagnetic catapult for UAVs. The PLAN's third aircraft carrier, *Fujian*, began its sea trials in the first half of 2024 and remains on track for a 2025 operational capability.

The PRC has long challenged foreign military activities in its territorial seas and EEZ in a manner inconsistent with customary international law in the UNCLOS. However, in recent years, the PLA has begun conducting the same types of military activities inside and outside the FIC in the EEZs of other countries, including the United States. This activity highlights the PRC's double standard in the application of its interpretation of international law. Examples include sending intelligence collection ships to collect on military exercises, such as the Rim of the Pacific exercises off Hawaii in 2014, 2018, and 2022, and the TALISMAN SABER exercises off Australia in 2017, 2019, and 2021, as well as operating near Alaska in 2017 and 2021. PRC intelligence collection ships operated near sensitive defense facilities off Australia's west coast in May 2022 and near Japan in July 2022. PRC survey ships are extremely active in the SCS, frequently operating in the claimed EEZs of other nations in the region, such as the Philippines, Vietnam, and Malaysia.

The PRC's 2019 defense white paper described the PLAN as adjusting to changes in the strategic requirements of near seas defense and far seas protection, noting that it was "speeding up the transition of its tasks from defense on the near seas to protection missions on the far seas..." Toward the PRC's goal of building a "strong and modernized navy force," the PLAN has replaced or updated its previous generations of platforms that had limited capabilities in favor of larger, modern multi-mission combatants. Today, the PLAN is largely composed of modern multi-role platforms featuring advanced anti-ship, anti-air, and anti-submarine weapons and sensors. The PLAN is emphasizing maritime joint operations and joint integration with the other branches of the PLA. This modernization aligns with the PRC's growing emphasis on the maritime domain and increasing demands for the PLAN to operate at greater distances from mainland China.

The PLAN organizes, mans, trains, and equips the PLA's naval and naval aviation forces as well as the PLANMC, which is subordinate to the PLAN. The PLAN continues to implement structural reforms that began in late 2015 and early 2016. The PLA-wide reforms removed the PLAN headquarters from conducting operations, which became the purview of the PLA's joint theater commands, focusing it instead on organizing, manning, training, and equipping naval forces.

Service Roles and Missions. The PLAN continues to develop into a global force, gradually extending its operational reach beyond East Asia into a sustained ability to operate at increasingly longer ranges, including a continuous presence in the Gulf of Aden. The PLAN's latest surface and subsurface platforms enable combat operations beyond the reach of the PRC's land-based defenses. In particular, the PRC's growing force of aircraft carriers extend air defense coverage of deployed task groups beyond the range of land-based defenses, enabling operations farther from China's shore. The PLAN's emerging requirement for sea-based land-attack systems will enhance the PRC's ability to project power. Furthermore, the PLAN has a sizable force of highly capable logistical replenishment ships to support long-distance, long-duration deployments, including two new FUYU class fast combat support ships (AOEs) built specifically to support aircraft carrier and large-deck amphibious ship operations. The PLAN's expanding fleet of large modern amphibious warships enable it to conduct a wide range of expeditionary operations wherever PRC interests are threatened or in support of PRC participation in internationally sanctioned operations. The

expansion of naval operations beyond the PRC's immediate region facilitates its NWMA and further legitimizes the PRC's growing global military posture, including at its base in Djibouti.

The PRC is in the beginning stages of operating its "multi-carrier force." The PRC continues to learn lessons from operating its first aircraft carrier, *Liaoning*. Its first domestically-built aircraft carrier, *Shandong*, was launched in 2017 and commissioned in December 2019. The PRC's next generation of carriers, the new FUJIAN class—the first of which it is outfitting—will have greater endurance and an electromagnetic catapult launch system, making them capable of launching various types of specialized fixed-wing aircraft for missions, such as airborne early warning (AEW) and EW. This will increase the striking power of a potential PLAN carrier battle group when deployed to areas beyond the PRC's immediate periphery. CV-18 *Fujian* launched in June 2022 and is expected to enter operational service in 2025.

The PLAN's newest amphibious ships, the YUSHEN LHA and YUZHAO amphibious transport docks (LPD), are modern platforms capable of regional and global expeditionary missions in support of wartime and non-war contingency operations singly or as part of capable and flexible task groups composed of multiple amphibious ships and surface combatants. An even larger expeditionary ship, the YULAN LHA (Type 076) is expected to join the fleet in the second half of the decade and provide additional sea control via catapult-launched UAVs.

The PLAN continues to build multiple new, large auxiliary ships to support force projection operations, including large logistic ships, such as the FUYU AOE, the large DAKAI and DAFENG-class submarine support ships, and specialized platforms for intelligence collection ships and ocean surveillance ships.

The PLAN's ability to perform missions beyond the FIC is modest but growing as it gains more experience operating in distant waters and acquires larger and more advanced platforms. The PRC's experience in extended range operations primarily comes from extended task group deployments and its ongoing counterpiracy mission in the Gulf of Aden. Other recent extended-range PLAN operations include the following:

- The PLAN deployed CV-17 to the Philippine Sea three times in 2023, a record for a single PLAN CV in a single calendar year.
- In June 2023, a PLAN task group, including YUSHEN-class LHA-32, trained in the SCS and Western Pacific, marking the first extended range deployment for the newly commissioned LHA.
- In September, the PLAN conducted a large training event in the Philippine Sea involving CV-17, dozens of surface ships, and multiple aircraft.
- In July and August 2023, a PLAN task force participated in the PRC-Russia exercise NORTHERN/INTERACTION, and then conducted a joint patrol with an RFN task force in the Pacific Ocean, including the Bering Sea. Overall, according to PRC state media, the PLAN has expanded its original mission of escorting PRC-flagged vessels and merchant ships from other countries as well.

- The PLAN sustained its counter-piracy task groups in the Gulf of Aden through 2023, a 15-year effort that is the PRC's first enduring naval operation beyond the Indo-Pacific region. In April 2023, ships from the 43rd Naval Escort Task Force (NETF) conducted a multiday noncombatant evacuation operation from Sudan to Saudi Arabia.

Service Force Structure and Organization. The PLAN is the largest navy in the world with a battle force of over 370 platforms, including major surface combatants, submarines, ocean-going amphibious ships, mine warfare ships, aircraft carriers, and fleet auxiliaries. Notably, this figure does not include approximately 60 HOUBEI class patrol combatants that carry anti-ship cruise missiles (ASCM). The PLAN's overall battle force is expected to grow to 395 ships by 2025 and 435 ships by 2030. Much of this growth will be in major surface combatants. The PLAN's force structure consists of theater navies with subordinate submarine flotillas, surface ship flotillas, aviation units, and naval bases. The PLAN's Northern Theater Navy is subordinate to the NTC, the Eastern Theater Navy is subordinate to the ETC, and the Southern Theater Navy is subordinate to the STC.

MAJOR NAVAL UNITS



Service Capabilities and Modernization. The PLAN has highly prioritized modernizing its submarine force but its force structure continues to grow modestly as it matures its force, integrates new technologies, and expands its shipyards. The PLAN operates six nuclear-powered ballistic missile submarines (SSBN), six nuclear-powered attack submarines (SSN), and 48 diesel-powered/air-independent powered attack submarines (SS). Despite the ongoing retirement of older hulls, the PLAN's submarine force is expected to grow to 65 units by 2025 and 80 units by 2035 due to an expansion of submarine construction capacity.

The PRC continues to increase its inventory of conventional submarines capable of firing advanced ASCMs. Between the mid-1990s and mid-2000s, the PLAN purchased 12 Russian-built KILO

class SS units, eight of which can launch ASCMs. PRC shipyards have delivered 13 SONG class SS units (Type 039) and 21 YUAN class diesel-electric air-independent propulsion attack submarines (SSP) (Type 039A/B). The PRC is expected to produce 25 or more YUAN class submarines by 2025. In late 2021, the PLAN retired the first two KILO class submarines (both non-ASCM capable) purchased from Russia in the 1990s.

Over the past 15 years, the PLAN has constructed 12 nuclear-powered submarines—two SHANG I class SSNs (Type 093), four SHANG II class SSNs (Type 093A), and six JIN class SSBNs (Type 094). Equipped with the CSS-N-14 (JL-2) submarine-launched ballistic missile (SLBM) (3,900 nm) or the CSS-N-20 (JL-3) SLBM (5,400 nm), the PLAN's six operational JIN class SSBNs represent the PRC's first credible sea-based nuclear deterrent. Each JIN class SSBN can carry up to 12 missiles. In 2019, Beijing displayed these missiles at the PRC's 70th founding anniversary parade. The PRC's next-generation Type 096 SSBN will reportedly be armed with follow-on longer range SLBM. The Type 096 will likely begin construction soon. Considering the projected 30-plus-year service life of the platforms, the PRC will operate its JIN and Type 096 SSBN fleets concurrently in the 2030s. This would align with Xi's 2018 directive for the SSBN force to achieve "stronger growth."

The PRC launched four SHANG III class (Type 093B) guided-missile nuclear-powered attack submarines (SSGN) between May 2022 and January 2023 and could have three hulls of this class operational by 2025. This new SHANG class variant enhances the PLAN's anti-surface warfare capability and could provide a clandestine land-attack option if equipped with LACMs. The PLAN is improving its anti-submarine warfare (ASW) capabilities through the development of its surface combatants and special mission aircraft but continues to lack a robust deep-water ASW capability.

The PLAN remains engaged in a robust shipbuilding program for surface combatants. As of early 2024, the PLAN is building a new batch of CG, DDG, and two different classes of guided-missile frigates, including a larger, more capable variant: designated JIANGKAI III (054B). These assets will significantly upgrade the PLAN's air defense, anti-ship, and anti-submarine capabilities and will be critical as the PLAN expands its operations beyond the range of the PLA's shore-based air defense systems. By the end of 2023, the PLAN had commissioned its 40th JIANGKAI II class FFG and is building additional units with minor updates. The PLAN augmented its littoral warfare capabilities, especially for operations in the ECS and SCS, with the high-rate production of the JIANGDAO class corvettes (FFLs) (Type 056 and Type 056A). The PLAN commissioned the 72nd JIANGDAO in February 2021, completing the production run. The PLAN subsequently transferred the early flight Type 056 variants, likely 22 ships total, to the CCG in 2021, probably due to the early models' lack of towed-array sonar. The remaining JIANGDAOs (056A) are equipped with a towed-array sonar and are, thus, capable of contributing to ASW operations. The PRC continues to operate 60 HOUBEI (Type 022) missile boats, largely in a coastal defense role.

The PLAN has expanded its force of large surface combatants with two programs, the LUYANG III DDG and the RENHAI CG. By the end of 2023, the PRC had commissioned 25 LUYANG III DDGs—including 12 lengthened LUYANG III MOD DDGs—with additional hulls under construction. Both the standard LUYANG III and the LUYANG III MOD have a 64-cell multipurpose vertical launch system (VLS) capable of launching cruise missiles, SAMs, and anti-submarine missiles, and the Mod variants can carry the new Z-20 anti-submarine helicopter. By mid-2024, eight RENHAI-class CGs were in commission in the PLAN with additional hulls under

construction. The RENHAI has 112 VLS cells and can carry a large load out of weapons, including ASCMs, SAMs, torpedoes, and anti-submarine weapons along with likely LACMs and anti-ship ballistic missiles (ASBM) when those become operational. In early 2022, the PLAN released a video of RENHAI CG test launching an ASBM with a reported/estimated range of 540 nm. The new ship-launched ASBM can possibly be launched by the LUYANG III and LUYANG III MOD DDGs.

The PLAN continues to emphasize anti-surface warfare capabilities in its force developments. The PLAN's frigates and corvettes, as well as modernized older combatants, carry variants of the YJ-83/YJ-83J ASCM (135 nm) while newer surface combatants, such as the LUYANG II-class DDGs, are fitted with the YJ-62 (270 nm). The LUYANG III class DDGs and the RENHAI class CGs are fitted with a variant of the PRC's newest ASCM, the YJ-18A (290 nm). A few modernized destroyers have been retrofitted with the supersonic YJ-12A ASCM (270 nm), and the next-generation frigates may receive this missile. Eight of the PLAN's 12 KILO class SSs are equipped with the Russian built SS-N-27b ASCM (120 nm). The PRC's SONG-class SS, YUAN class SSP, and SHANG class SSN field the PLAN's newest domestic submarine-launched ASCM, the YJ-18, which constitutes an improvement over the SS-N-27b ASCM. It is possible the PRC is developing a launcher that can fit inside a standard commercial shipping container for covert employment of the YJ-18 aboard merchant ships.

The PLAN recognizes that long-range ASCMs require a robust, over-the-horizon (OTH) targeting capability to reach their full potential. To fill this capability gap, the PLA is investing in joint reconnaissance, surveillance, command, control, and communications systems at the strategic, operational, and tactical levels for high-fidelity targeting information for surface and subsurface launch platforms.

As the PLAN continues to transition into a global multi-mission force, the addition of land-attack capabilities to its modern array of anti-surface and anti-air capabilities is a logical next step. In the coming years, the PLAN will probably field LACMs on its newer cruisers and destroyers and the developmental SHANG III SSGN. The PLAN could retrofit its older surface combatants and submarines with land-attack capabilities. The addition of land-attack capabilities to the PLAN's surface combatants and submarines would provide the PLA with flexible long-range strike options, enabling the PRC to hold land targets at risk beyond the Indo-Pacific region.

The PRC's investment in LHA ships signals its intent to continue to develop its expeditionary warfare capabilities. In April 2021, the PRC commissioned the first YUSHEN class LHA (Type 075) followed by the commissioning of the second hull in December 2021. A third YUSHEN-class LHA was commissioned in October 2022 while the first hull achieved IOC in March 2022, and a fourth hull was outfitting during the second half of 2023 and will reach operational status during 2024.The YUSHEN class are highly capable, large-deck amphibious ships that will provide the PLAN with an all-aspect expeditionary capability, including the ability to carry a large number of landing craft, troops, armored vehicles, and helicopters. In addition, there are indications the PRC has begun construction on an even larger LHA, the YULAN (Type 076), at a shipyard in Shanghai. This ship will likely use a hybrid electric propulsion system and have electromagnetic catapults (EMALS) for launching large maritime UAVs for strike and ISR missions. In addition, the PLAN has eight large YUZHAO class LPDs (Type 071) in service. The YUZHAO class LPDs and YUSHEN class LHAs provide the PLA with greater capacity, endurance, and more flexibility

for long-range operations than the PLAN's older landing ships, which it has reduced in number over the last decade with obsolete units being decommissioned. The YUSHEN and YUZHAO can each carry several of the new YUYI class air-cushion medium landing craft and the conventional YUBU class utility landing craft as well as a variety of helicopters, tanks, armored vehicles, and PLAN marines for long-distance expeditionary deployments.

The PLAN operates two moderate-capability "ski-jump" aircraft carriers based on an old Soviet design. While limited compared to U.S. aircraft carriers, the two KUZNETSOV variants (CV-16 and CV-17) provide the PRC with substantially more sea-based air power than any other country in the region. As previously noted, the PRC launched a third aircraft, CV-18 *Fujian*, in June 2022. The ship began sea trials in the first half of 2024. *Fujian* is larger than the ski-jump carriers and fitted with an electromagnetic catapult launch system. This design enables it to support additional fighter aircraft, fixed-wing early-warning aircraft, and more rapid flight operations, thus extending the reach and effectiveness of the PRC's carrier-based strike aircraft. CV-18 is expected to be operational in the first half of 2025, with additional carriers to follow.

The PLAN operates and is developing aircraft to operate from its carriers and combatants. In addition to the standard J-15 fighter that operates from PLAN carriers, a catapult-capable J-15 variant, is in development. The aircraft is testing from land-based steam and electromagnetic catapults. Two other J-15 variants are in development—the J-15S tandem-seat variant and the J-15D EW variant, which is equipped with wingtip electronic support measures/electronic intelligence gathering pods as well as several conformal antennas. The PRC is developing a carrier-capable variant of the fifth-generation J-31 fighter, known as the J-35, which conducted its first flight in 2021. Beyond fighter aircraft, the PRC is refining the design of a carrier-borne AEW aircraft, the KJ-600. A mockup of the aircraft, which appears externally similar to the E-2C/D Hawkeye, has existed for many years. Prototypes of the KJ-600 have been in flight testing since 2020. Beijing is developing the Z-20F helicopter for the PLAN intended for the RENHAI cruisers, LUYANG III MOD destroyers, and the JIANGKAI II MOD and JIANGKAI III frigate classes. The Z-20F is similar to the U.S. Navy's SH-60 and will provide significant improvements in ASW capabilities over the smaller Z-9 and Ka-28 helicopters the PLAN operates. The Z-20F will complement the larger Z-18Fs that operate from the PLAN's aircraft carriers.

Accompanying the manned fixed-wing and rotary aircraft will be UAVs. The PLAN has conducted sea trials on multiple surface combatants with vertical take-off and landing UAVs ranging in wingspan between 3.5 and 4 meters. These UAVs, used for ISR purposes, include the SD-40, CSC-005, S-100 CAMCOPTER, and AV-500 UAV systems.

Signifying its emphasis on developing future carrier-based aviation, the PLAN transferred several shore-based aircraft to the PLAAF. This includes all its H-6J bombers and JH-7 maritime strike aircraft. These aircraft were absorbed by the PLAAF and continue to remain available for maritime strike missions. PLAAF H-6Ks have been noted training for maritime strike missions since 2020.

The PLAN continues to operate a diverse inventory of fixed-wing special mission aircraft for maritime patrol and AEW aircraft, including many of the same variants operated by the PLAAF. However, the PLAN operates a variant of the Y-9 for ASW and maritime patrol. This aircraft is equipped with a magnetic anomaly detector boom, similar to that of the U.S. Navy's P-3. This Y-9 ASW variant is equipped with surface-search radar mounted under the nose as well as multiple-blade antennas on the fuselage, probably for electronic surveillance. A small electro-

optical (EO)/infrared turret is just behind the nose wheel. This variant is equipped with an internal weapons bay in front of the main landing gear.

The PRC operates fixed-wing, medium-to-large size UAVs from land bases. These UAVs specialize in ISR and include EO/infrared imaging, SIGINT capabilities, and synthetic aperture radar (SAR). Many of these UAVs can be operated in SATCOM mode, extending the datalink and operational ranges well past traditional line-of-sight (LOS) communications. Fixed-wing UAVs include the XIANGLONG high-altitude, long-endurance UAV, the BZK-005 medium-altitude, long-endurance UAV, and the ASN-209 medium-altitude, medium-endurance UAV.

The PLAN continues to build many seagoing auxiliary and support ships, including hospital ships (AH), submarine salvage and rescue ships, and various other large auxiliaries for specialized missions. The PRC is expected to build additional fleet replenishment oilers soon to support its expanding long-duration combatant ship deployments. The PRC's first domestically built polar icebreaker, *Xue Long 2*, became operational in 2019; a new research icebreaker, *Ji Di*, was commissioned in 2024; and a former commercial icebreaking support ship, the similarly-named, *Zhong Shan Da Xue Ji Di,* was converted to PRC government use. These ships are operated or used by the Polar Research Institute of the Ministry of Natural Resources, and regularly deploy to the Antarctic in support of PRC polar research stations and for scientific/survey operations. In November 2023, *XUELONG 1* and a PRC cargo vessel departed for the PRC's 40th research mission to Antarctica, marking the fourth occasion research vessels have conducted joint missions in the Antarctic. This expedition's key task was to build a new Antarctic station near the Ross Sea, which will be fifth research station in Antarctica.

For the PLAN and CCP, the possession of SSBNs has long been an important symbol of achieving great power status. The PRC has six operational Type 094 JIN-class SSBNs. These submarines are conducting at sea deterrent patrols. The PLAN's JIN SSBNs are equipped to carry up to 12 SLBMs, JL-2 (CSS-N-14) and JL-3 (CSS-N-20), representing the PRC's first viable sea-based nuclear deterrent. With six operational SSBNs, the PLAN has the capacity to maintain a constant at sea deterrent presence. With a range of approximately 3,900 nm, a JIN equipped with the JL-2 would have to operate in the mid-Pacific Ocean to threaten targets in the western half of the continental United States (CONUS) (as well as Hawaii and Alaska) or east of Hawaii to threaten targets on the East Coast of the United States. PRC sources claim the JL-3 has a range of over 5,400 nm, which would allow a JIN armed with this missile to target portions of CONUS from PRC littoral waters. The PLAN's next generation SSBN, the Type 096, is expected to enter service the late 2020s or early 2030s. Considering the 30-plus-year service life of the PRC's first-generation SSNs, the PRC will operate the Type 094 and Type 096 SSBNs concurrently.

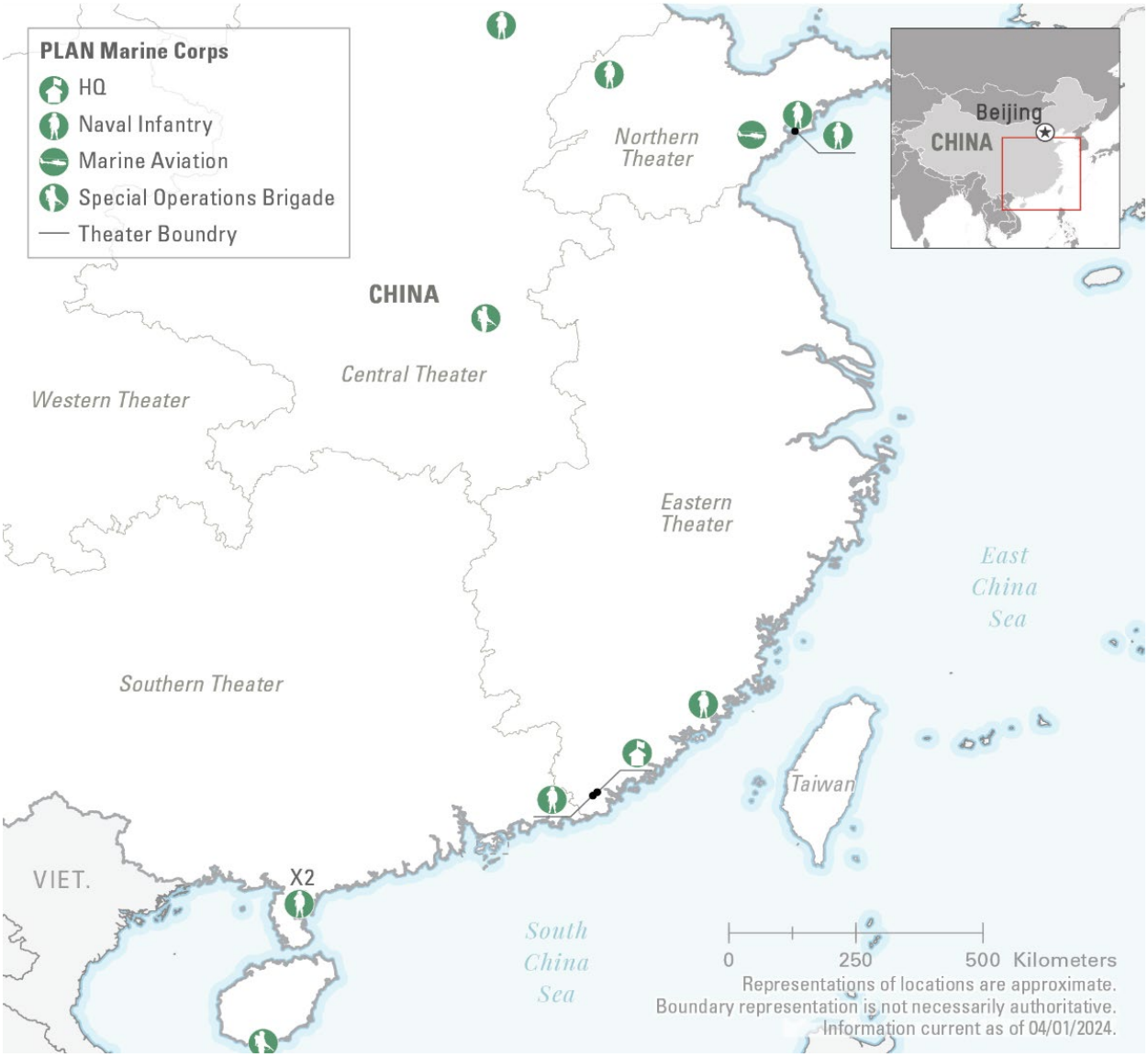
Service Readiness. The PLAN maintains its surface fleet at high readiness with an emphasis on enabling a surge capacity to respond to regional contingencies, as observed during the Speaker of the House visit to Taiwan in August 2022. Improvements to the PLAN's training system facilitates this readiness by enabling ships to return to operations soon after completing extended maintenance periods. These improvements include reforms that implemented a year-round at-sea and ashore training cycle integrated into routine operations, such as patrols and deployments, enabling the PLAN to remain poised to maximize major surface combatant availability for near seas defense. The PLAN's submarine fleet is similarly positioned to maintain high readiness, with an increasing focus on real-world contingency training further from shore for longer periods of

time. This operationally aligned training is part of regular patrols, in line with expanding maritime domain requirements to operate proficiently in near and far seas. The submarine force is aspiring toward a capability for integrated operations to enable more dynamic tasking and response to support force modernization goals.

PLAN Marine Corps. After taking possession of three PLAA BDEs in late 2022, the PLANMC now has 11 BDEs—eight maneuver, two SOF, and one aviation—and an approximate total force composition of 55,000 marines. With the assumption of the three PLAA BDEs, the PLANMC gained their legacy equipment, which the BDEs continued to train on in 2023. It is expected that the new BDEs will begin updating their inventory to match the other PLANMC BDEs in 2024. The addition of the three new BDEs places PLANMC elements in every theater except for the WTC. The PLANMC maintains a presence at the PRC's first overseas military base in Djibouti, extending the PRC's military reach and strategic influence in Africa and the Middle East. The assessed size of the PLANMC unit in Djibouti is a battalion and consists of approximately 400 marines. The PLANMC's presence in Djibouti provides the PRC with the ability to support a military response to contingencies affecting the PRC's investments and infrastructure in the region and the approximately 1 million PRC citizens in Africa and 500,000 in the Middle East, although the PLANMC in Djibouti has not been observed assisting in evacuation efforts to date. The PLANMC embarks a contingent of marines with the PLAN's Gulf of Aden counterpiracy-focused NETF that supports the PRC's trade interests. The PLANMC supports the PRC's military diplomacy. In 2023, the PLANMC trained with counterparts from Pakistan, South Africa, Russia, Thailand, Tanzania, and Saudi Arabia.

Service Roles and Missions. The PLANMC's roles and missions principally include defending PLA bases in mainland China, the SCS, and abroad; conducting amphibious operations to seize and defend small reef and island outposts; and conducting NWMA. Although the PLANMC has traditionally focused on its task to assault and defense of small islands in the SCS, more recently its focus has grown to include expeditionary operations beyond FIC. The PLANMC's roles under NWMA support protection of overseas interests, including resources, infrastructure, and citizens abroad. The missions for the PLANMC SOF BDEs are to conduct a myriad of diverse missions for the PLA, including infiltration, critical node seizure, C2 decapitation, maritime escort, and counterterrorism operations and providing precision strike guidance.

PLAN MARINE CORPS



Service Force Structure and Organization. Each of the original six maneuver BDEs possess the following battalions: air assault, reconnaissance, air defense, artillery, operational support, and a service support battalion. The amphibious BDEs possess two amphibious mechanized infantry combined arms battalions and one light mechanized infantry combined arms battalion. The non-amphibious BDE possesses two light mechanized infantry combined arms battalions and likely a light high-mobility battalion. Once the new PLANMC BDEs have finalized their transition to the marines, their structure will almost certainly resemble that of the other PLANMC BDEs. The aviation BDE maintains at least two "groups" (*da dui*), consisting of Z-8C and Z-9D helicopters and will likely possess a naval variant of the Z-8L and Z-20J helicopters soon. The PLANMC SOF BDE has at least three special operations battalions and one reconnaissance battalion and consists of approximately 3,000 marines.

Service Capabilities and Modernization. While the aviation BDE will likely continue to receive additional platforms over the next several years, the combined arms and SOF BDEs likely had

completed their modernization efforts by the end of 2022. The only new piece of equipment the PLANMC received in 2023 was the PGZ-07 tracked self-propelled anti-aircraft gun (SPAAG). The PLANMC's efforts will likely shift to updating the new BDEs' table of organization and equipment in 2024.

Service Readiness. PLANMC training in 2023 largely resembled training observed during the past two years. The PLANMC continued to showcase its new PCL-181 vehicle-mounted, self-propelled gun-howitzer system. It revealed its new PGZ-07 SPAAG with live-fire training with ZTL-11 self-propelled anti-tank guns, PLZ-07B howitzer guns, and ZTQ-15 light tanks. The PLANMC highlighted its maturing aviation capability throughout the year. Pilots from the aviation BDE participated in training evolutions where they conducted troop transport for land and amphibious assault missions and delivered special operations marines via parachute. Amphibious marine forces continued to conduct routine driver integration training with PLAN amphibious ships and civilian roll-on/roll-off (RO/RO) vessels. Non-amphibious marine forces continued civilian-military integration training, with a new PLANMC BDE in the northern theater observed loading vehicles onto a RO/RO and conducting a sea crossing before unloading from the RO/RO.

PEOPLE'S LIBERATION ARMY AIR FORCE (PLAAF)

Key Takeaways

- The PLAAF and PLAN Aviation together constitute the largest aviation force in the Indo-Pacific region.
- The PLAAF is improving technology standards. The PLAAF continues to modernize with the delivery of domestically built aircraft and a wide range of UASs.
- In October 2019, the PRC signaled the return of the airborne leg of its nuclear triad after the PLAAF publicly revealed the H-6N as its first nuclear-capable air-to-air refuellable bomber.
- In 2023, shifting missions for PLAN naval aviation triggered the transfer of significant portions of PLAN shore-based, fixed-wing combat aviation units, facilities, air defense, and radar units to the PLAAF. Given time, this shift will probably enable better C2 over the PRC's integrated air defense systems as well as the network of ground-based air domain awareness radars supporting the PRC's national integrated air defense system (IADS) network.

Service Roles and Missions. The PLAAF and PLAN Aviation together constitute the largest aviation forces in the region and the third largest in the world, with over 3,150 total aircraft (not including trainer variants or UASs), of which approximately 2,400 are combat aircraft (including fighters, strategic bombers, tactical bombers, multi-mission tactical, and attack aircraft). The PLAAF's role is to serve as a comprehensive strategic air force capable of long-range airpower projection. The PRC's 2019 defense white paper described the PLAAF's missions and tasks as transitioning from territorial air defense to "offensive and defensive operations."

Service Force Structure and Organization. In 2021, General Chang Dingqiu assumed the post of PLAAF commander and continued to enact PLAAF reforms to improve the force's ability to

accomplish joint warfighting tasks. The PLAAF is rapidly approaching technology typical of U.S. standards. The PLAAF has aviation, airborne, air defense, radar, electronic countermeasure, and communications forces organized into five Theater Command Air Forces, which command air bases, divisions, and BDEs. The PLAAF Airborne Corps (PLAAFAC) commands six airborne combined arms BDEs, a SOF BDE, an operational support BDE, an aviation transport BDE, a training base, and a new training BDE. The six combined arms BDEs consist of three airborne infantry, one air assault, one wheeled airborne mechanized (wheeled air droppable armored vehicles), and one tracked airborne mechanized (tracked air droppable armored vehicles). Each airborne combined arms BDE typically commands four combined arms battalions, an artillery battalion, a reconnaissance and pathfinder battalion, an operations support battalion, and a service support battalion, and possibly a transportation battalion.

MAJOR AIR UNITS



Service Capabilities and Modernization. The PLAAF and PLAN Aviation continue to field greater numbers of fourth-generation aircraft (now more than 1,300 of 1,900 total fighters, not including trainers) and probably will become a majority fourth-generation force in the next several years. The PLAAF's J-16 is a fourth-generation plus multi-role fighter that will be capable of carrying the PLA's very long-range air-to-air missile, the PL-17. In 2023, over 225 J-16s were in service, with plans to produce more in the coming years. For fifth-generation fighters, the PLAAF has operationally fielded its new J-20 stealth fighter. PRC social media revealed a new two-seat variant of the J-20 in October 2021. The PLAAF is preparing upgrades for the J-20, which may include increasing the number of AAMs the fighter can carry in its low-observable configuration, installing thrust-vectoring engine nozzles, and adding super cruise capability by installing higher-thrust indigenous WS-15 engines. Development continues on the smaller FC-31/J-31/J-35 for export or as a future naval fighter for the PLAN's next class of aircraft carriers.

The PRC's bomber force is composed of H-6 Badger variants, domestically produced versions of the Soviet Tupolev Tu-16 (Badger) bomber. Despite the relative age of its bomber force, the PLAAF has worked to maintain and enhance the operational effectiveness of these aircraft. In recent years, the PRC has fielded greater numbers of the H-6K, a modernized H-6 variant that integrates standoff weapons and features more-efficient turbofan engines for extended-range. The H-6K can carry six LACMs, giving the PLA a long-range standoff precision strike capability that can range targets in the Second Island Chain from home airfields in mainland China. This aircraft carries six supersonic long-range YJ-12 ASCMs and can attack warships out to the Second Island Chain.

During the PRC's 70th anniversary parade in 2019, the PLAAF publicly revealed the H-6N, a derivative of the H-6K optimized for long-range strikes. The H-6N features a modified fuselage, enabling it to carry an air-launched ballistic missile (ALBM) externally that may be nuclear capable. In October 2020, an H-6N was observed carrying an ALBM. The H-6N's air-to-air refueling capability provides it greater reach over non-air refuellable H-6 variants. In 2020, the PLAAF operationally fielded the H-6N bomber, providing a platform for the air component of the PRC's nascent nuclear triad. The H-6N-equipped unit very likely is developing tactics and procedures for the PLAAF nuclear mission. The PLAAF is seeking to extend its power projection capability with the development of a new H-20 stealth strategic bomber, with official PRC state media stating that this new stealth bomber will have a nuclear mission in addition to filling conventional roles. The PLAAF is developing new medium- and long-range stealth bombers to strike regional and global targets. PLAAF leaders publicly announced the program in 2016; however, it may take more than a decade to develop this type of advanced bomber.

In 2019, the PLAAF publicly debuted its new Y-9 communications jamming/electronic countermeasures aircraft (GX-11). This aircraft can disrupt an adversary's battlespace awareness at long ranges. The PLA can conduct air-to-air refueling operations to extend the ranges of its fighter and bomber aircraft equipped with refueling probes using a small number of IL-78 Midas and a tanker variant of its Y-20 heavy-lift transport, Y-20U, which will improve the PLAAF's ability to operate beyond the FIC from bases in mainland China.

Production and deliveries of the KJ-500—the PRC's most advanced airborne early warning and control (AEW&C) aircraft—continued at a rapid pace, joining earlier KJ-2000 Mainring and KJ-200 Moth variants. These aircraft amplify the PLAAF's ability to detect, track, and target

threats in varying conditions, in larger volumes, and at greater distances. It extends the range of the PLA's IADS network. Furthermore, the PRC has produced at least one KJ-500 with an aerial refueling probe, which will improve the aircraft's ability to provide persistent AEW&C coverage.

The PRC's aviation industry continues to advance with deliveries of its domestic Y-20 large transport aircraft and completion of the world's largest seaplane, the AG600. These transports will supplement and eventually replace the PRC's small fleet of strategic airlift assets, which, to date, consists of a limited number of Russian-made IL-76 aircraft. These large transports are intended to support airborne C2, logistics, paradrop, aerial refueling, and strategic reconnaissance operations as well as humanitarian assistance and disaster relief (HA/DR) missions.

The PRC continues its comprehensive UAS modernization efforts, highlighted by the routine appearance of increasingly sophisticated systems across theater and echelon levels. The last three years have seen several key milestones, including the airshow display and operational appearance of the Xianglong jet-powered UAS as well as the unveiling of the supersonic WZ-8 UAS and a redesigned version of the GJ-11 stealth unmanned combat air vehicle. The PLA continues the maritime use of ISR UASs, featuring the venerable BZK-005 and the newer TW-328/TB001. The PRC is expanding the applications of large UASs by demonstrating uses, including disaster communications, anti-submarine roles, firefighting, and weather modification. Advanced small UASs are increasingly appearing in military and civilian applications, with PRC industry remaining a key exporter of UASs and components of all sizes.

In addition to maturing their capabilities, the PRC is signaling its efforts in next generation capabilities. Air and trade shows are displaying growing numbers of autonomous and teaming systems, including for combat applications. In these concepts, PRC developers are demonstrating an interest in additional growth beyond ISR and EW into air-to-air and air-to-ground combat, with substantial development efforts to produce swarming capability for operational applications. PRC researchers have disclosed the development of a future multi-domain kill-web designed to target penetrating counterair by coordinating across aircraft, sensors, and missiles.

Air and Missile Defense. The PLAAF possesses one of the largest forces of advanced long-range SAM systems in the world, composed of Russian-sourced SA-20 (S-300) battalions and domestically produced CSA-9 (HQ-9) and follow-on HQ-9b battalions. To improve its strategic long-range air defenses, in 2019, the PRC acquired the SA-21 (S-400) SAM system from Russia. The PRC is fielding its indigenous CH-AB-02 (HQ-19), which has a ballistic missile defense (BMD) capability. PRC researchers are interested in developing SAMs with a range similar to the DF-17 to provide ultra-long-range air defense using space-based ISR to support in-flight target updates. The PRC is developing kinetic-kill vehicle technology to field a mid-course interceptor, which will form the upper layer of a multi-tiered missile defense. The PLA tested a land-based, mid-course interceptor on February 4, 2021.

Service Readiness. The PLAAF has embarked on a set of major institutional reforms aimed at creating a modern, professional fighting force. A major tenant of these reforms is an effort to train and exercise under what the PLA refers to as "actual combat conditions," which include training and exercise scenarios meant to mimic real-world battle conditions. Such an emphasis reflects an acknowledgment by senior leaders that the PLA must reorient itself to be able to fight and win wars against highly capable military competitors.

Elements of this training include pilots creating their own flight plans and engaging in aerial intercepts that are not completely pre-scripted. The PLAAF has increased its use of confrontation training. The PLAAF continues to participate in unilateral and bilateral exercises with foreign air forces, including Pakistan, Russia, and Thailand.

PEOPLE'S LIBERATION ARMY ROCKET FORCE (PLARF)

Key Takeaways

- The PLARF is advancing its long-term modernization plans to enhance its "strategic deterrence" capabilities.
- The PRC probably completed the construction of its three new solid-propellant silo fields in 2022, which will cumulatively contain at least 300 new intercontinental ballistic missiles (ICBM) silos and has loaded at least some ICBMs into these silos.
- The PRC is developing new ICBMs that will significantly improve its nuclear-capable missile forces and require increased nuclear warhead production, partially due to the introduction of multiple independently targetable reentry vehicle (MIRV) capabilities.
- The PRC may be exploring development of conventionally-armed intercontinental range missile systems. If developed and fielded, such capabilities would enable the PRC to threaten conventional strikes against targets in CONUS, Hawaii, and Alaska.

Service Roles and Missions. The PLARF organizes, mans, trains, and equips the PRC's strategic land-based nuclear and conventional missile forces and associated support forces and missile bases. The PLARF is critical to the PRC's nuclear deterrence strategy and its strategy to deter and counter third-party intervention in regional conflicts. According to the PRC's 2019 defense white paper, the PLARF is working towards "enhancing its credible and reliable capabilities of nuclear deterrence and counterattack, strengthening intermediate and long-range precision strike forces, and enhancing strategic counter-balance capability, so as to build a strong and modernized rocket force."

Service Force Structure and Organization. Established as an official military service in 2015, the PLARF is composed of at least 40 BDEs across seven combat missile bases and three support bases throughout the PRC. Six missile bases are responsible for approximately six to eight BDEs each, in addition to the newly established silo fields. The PRC's mobile and liquid-fueled fixed ICBM BDEs have six to 12 launchers per BDE, and all other BDEs likely have between 24 to 48 launchers per BDE. The PLARF's three support bases provide advanced servicing to PLARF units, overseeing the handling of the PRC's nuclear warheads, PLARF engineering and infrastructure, and personnel training and missile testing. The PLARF has different chains of command for conventional and nuclear operations, in line with its "dual deterrence, dual operations" missions requirement. For conventional operations, Theater Commanders probably exercise authority over PLARF units. For nuclear operations, however, the CMC maintains complete authority and issues orders directly to PLARF units.

MAJOR PLARF UNITS



Service Capabilities and Modernization. The PLARF fields a variety of conventional mobile ground-launched, short-, medium-, and intermediate-range ballistic missiles and ground-launched cruise missiles (GLCMs). The PLARF's ground-based missile forces complement the air- and sea-based precision strike capabilities of the PLAAF and PLAN. The PLARF's conventional missile forces includes the CSS-6 (DF-15) short-range ballistic missile (SRBM) (range 725 km–850 km), the CSS-7 (DF-11) SRBM (600 km), the CSS-11 (DF-16) SRBM (more than 700 km), land-attack and anti-ship variants of the CSS-5 (DF-21) medium-range ballistic missile (MRBM) (approximately 1,500 km), the hypersonic glide vehicle (HGV) capable CSS-22 (DF-17) MRBM, the CSS-18 (DF-26) IRBM (3,000 km–4,000 km), and the CJ-10 (DH-10) and CJ-100 (DF-100) GLCM (approximately 1,500 km–2, 000 km). The PLARF's conventionally-armed CSS-5 Mod 5 (DF-21D) ASBM variant gives the PLA the capability to conduct long-range precision strikes

against ships, including aircraft carriers, out to the Western Pacific from mainland China. The DF-21D has a range exceeding 1,500 km, is fitted with a maneuverable reentry vehicle, and is reportedly capable of rapidly reloading in the field.

The PLARF continues to grow its inventory of DF-26 IRBMs, which it first revealed in 2015 and fielded in 2016. As the PLARF expands its DF-26 inventory, it is phasing out DF-21 equipment. The PLA no longer fields any dedicated BDEs of the dual nuclear-conventional capable DF-21Cs. The multi-role DF-26 is designed to rapidly swap conventional and nuclear warheads and is capable of conducting precision land-attack and anti-ship strikes in the Western Pacific, the Indian Ocean, and the SCS from mainland China. In 2020, the PRC fired ASBMs against a moving target in the SCS.

The PLARF is developing and testing new variants of theater-range missiles and developing capabilities and methods to counter adversary BMD systems. The DF-17 passed several tests and is deployed operationally. In 2020, a PRC-based military expert described the primary purpose of the DF-17 as striking foreign military bases and fleets in the Western Pacific. The PLARF continues to expand its DF-17 inventory and this weapon's HGV payload is designed to evade adversary radars and BMDs. The PRC may be exploring development of conventionally-armed intercontinental range missile systems. If developed and fielded, such capabilities would enable the PRC to threaten conventional strikes against targets in CONUS, Hawaii, and Alaska.

The PLARF is developing more survivable ICBMs to significantly improve its nuclear-capable missile forces. The PRC probably will continue to grow the number of launchers at most ICBM units over the next several years. The PRC's ICBM arsenal consists of approximately 400 ICBMs, including fixed and mobile launchers capable of launching unitary and multiple reentry vehicles. The PRC's fixed ICBMs consist of multiple variants of the CSS-4 (DF-5) class missiles, one of which can carry up to five MIRVs and a silo-based CSS-10-class missile. The solid-fueled, road-mobile CSS-10 (DF-31) class and CSS-20 (DF-41) ICBMs complement this force. The CSS-10 Mod 2 (DF-31A), with a range exceeding 11,000 km, can reach most CONUS locations. The DF-41 ICBM has been operationally deployed. In the 2019 parade, commentators noted that two BDEs existed for the system. The PRC appears to be considering additional DF-41 launch options, including rail-mobile and silo-basing.

The PLA may have deployed a "long-range" DF-27 ballistic missile to the PLARF and has a HGV payload option as well as conventional land-attack, conventional antiship, and nuclear capabilities. Official PRC military writings indicate this range class spans 5,000 km–8,000 km, designating the DF-27 as an IRBM or ICBM. PRC media indicates that it can potentially range as far as Alaska and Hawaii. In 2023, a PRC-based commentator stated that the DF-27 can be used to strike high-value targets on Guam, indicating that the DF-27 would primarily be used for regional conventional strikes during conflict. The PRC probably is developing advanced nuclear delivery systems, such as a strategic HGV and a fractional orbital bombardment (FOB) system.

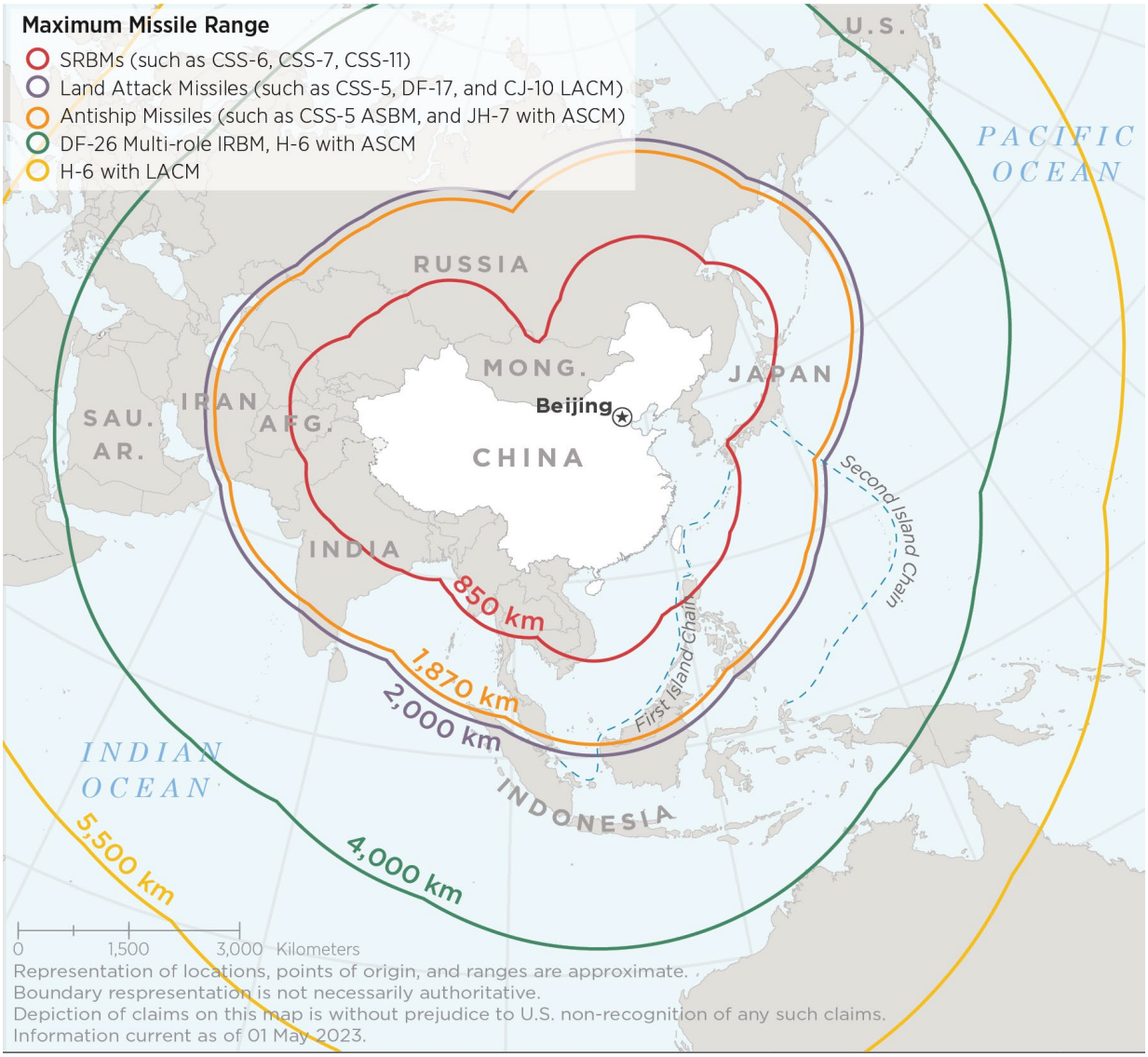
Service Readiness. The PLARF's growing arsenals of advanced and longer-range conventional missile systems improves its readiness for long-range precision strikes on U.S. and allied forces and bases throughout much of the Indo-Pacific. The PLARF routinely practices live-fire strikes on mock airfields, bunkers, aircraft, and ships, indicating that the PLARF is improving its readiness for several counter intervention strike contingencies. In April 2023, the PLARF participated in the JOINT SWORD joint exercise, in coordination with land-based aircraft and the PLAN operational

CV-17 *Shandong* carrier group. The exercise involved encircling Taiwan and testing the PLA's joint and coordinated strike capabilities in responding to perceived threats from U.S. warships. In August 2023, the PLARF participated in a joint exercise with the PLAN and PLAAF, testing the PLA's ability to conduct joint operations in vessel-aircraft integration and ASW.

THE PRC'S ROCKET FORCE

System	Launchers	Missiles	Estimated Range
ICBM	550	400	>5,500 km
IRBM	250	500	3,000 km–5,500 km
MRBM	300	1,300	1,000 km–3,000 km
SRBM	300	900	300 km–1,000 km
GLCM	150	400	>1,500 km

FIELDED CONVENTIONAL STRIKE



THE FORMER STRATEGIC SUPPORT FORCE (SSF)

Key Takeaways

- As of April 19, 2024, Beijing announced the dissolution of the SSF and the alignment of subordinate forces directly under the CMC. Beijing established of a new Information Support Force (ISF； 信息支援部队) under the CMC—commanded by Lieutenant General Bi Yi, the former deputy commander of the SSF—to coordinate the military's networks and communications systems. The updated PLA organizational structure features four theater-grade services—the PLAA, PLAN, PLAAF, and PLARF—and four deputy-theater grade forces or service "arms," comprising the Aerospace Force (ASF; 航天部队), Cyberspace Force (CSF; 网络空间部队), ISF, and the JLSF.

- The CMC did not release a detailed explanation of why it dissolved the SSF. It had created the SSF in December 2015 to serve as a theater command-level organization to centralize the PLA's strategic space, cyberspace, electronic, information, communications, and psychological warfare missions and capabilities. The CMC's decision to dissolve the SSF after only 8 years reveals compelling concerns over its contribution to joint operational effectiveness as well as severely inefficient management and leadership.

- The CSF, or the Network Systems Department (NSD) of the former SSF, is responsible for information warfare with an integrated mission set that includes cyberspace warfare, technical reconnaissance, EW, and psychological warfare. The ASF, or the Space Systems Department (SSD) of the former SSF, is responsible for military space and counterspace operations. The Information Communication Base (ICB) of the former SSF was responsible for PLA communications networks and network defense.

- The PRC continues to develop counterspace capabilities—including direct-ascent anti-satellite missiles, co-orbital satellites, EW, and directed-energy systems—to contest or deny another nation's access to and operations in the space domain.

- The PRC's space enterprise continues to mature rapidly and Beijing has devoted significant resources to growing all aspects of its space program, from military space applications to civil and commercial applications, such as profit-generating launches, scientific endeavors, and space exploration. The SSF worked with civilian organizations, such as universities and research organization, to integrate civilian support to military efforts.

Service Roles and Missions. On April 19, 2024, the PRC announced the establishment of a new PLA force, the ISF, and the subsequent dissolution of the SSF. The SSF had been established in 2015 to centralize the PLA's strategic space, cyberspace, electronic, and psychological warfare missions and capabilities. The SSF reported to the CMC and supported the entire PLA with its capabilities. The PRC's 2019 defense white paper described the SSF's modernization goals as "seeking to achieve big development strides in key areas and accelerate the integrated development of new-type combat forces, so as to build a strong and modernized strategic support force."

With the dissolution of the SSF, two formerly subordinate deputy theater command-level departments—the ASF and CSF—realigned directly under the CMC. The ASF, previously also known as the former SSF SSD, is responsible for military space and counterspace operations, and the CSF, previously also known as the former SSF NSD, is responsible for IO, which includes technical reconnaissance, EW, cyberspace warfare, and psychological operations. Also subordinated under the CMC, the ISF coordinates the development and application of PLA network information systems and provides communications support to the PLA.

General Ju Qiansheng served as SSF commander until sometime in 2023, when he was removed from his post probably after mishandling the February 2023 high-altitude balloon incident. A replacement had not been identified prior to the SSF's disbandment. Ju previously served as commander of the CSF. Lt. Gen. Shang Hong served as commander of the ASF, until leaving that position sometime in 2023 but a replacement has not been identified. Ju and Shang may have been implicated in corruption relating to the PLA's weapons procurement programs. The leader of the CSF is unknown. At the ISF's flag ceremony in April, the ISF commander and political commissar

were revealed to be the former deputy commander of the SSF, Lieutenant General Bi Yi, and the former political commissar of the SSF, General Li Wei, respectively.

Service Force Structure and Organization. With the SSF's disbandment, the ASF and CSF resubordinated directly under the CMC, along with the new ISF. The PLA identified an updated organizational structure with the ASF, CSF, ISF, and JLSF serving as the PLA's four service "arms." "Arms" are not a new concept for the PLA—before it became the PLARF, the Second Artillery Force was referred to as an "arm" of the PLA rather than a service.

Cyberspace Force. The CSF, formerly the SSF NSD, is responsible for information warfare with a mission set that includes cyberspace warfare, technical reconnaissance, EW, and psychological warfare. The CSF operates five theater-aligned technical reconnaissance bases, several signals intelligence bureaus, and several research institutes. The CSF provides intelligence support to the theater commands by leveraging a diverse suite of ground-based technical collection assets to provide a common operating picture to geographically dispersed operational units.

The "Three Warfares" Concept. The CSF performs missions and tasks associated with the PLA's concept of "Three Warfares," which comprises psychological warfare, public opinion warfare, and legal warfare. This department is the only publicly known organization in the PLA that performs psychological warfare operations. Refer to Special Topic: PRC Views of Information and Information Dominance for more on information warfare, including psychological warfare.

Aerospace Force. The ASF, formerly the SSF SSD, is responsible for nearly all PLA space operations, including space launch and support; space surveillance; space information support; space telemetry, tracking, and control; and space warfare. The PRC seeks to enhance the PLA's C2 for joint operations and establish a real-time surveillance, reconnaissance, and warning system. It is increasing the number and capabilities of its space systems, including communications and intelligence satellites as well as the BeiDou navigation satellite system.

The ASF operates at least eight bases, including those whose core missions are the launch, tracking, R&D, and operation of the satellites vital to the PRC's overhead C4ISR architecture. The ASF operates tracking, telemetry, and command (TT&C) stations in multiple locations worldwide to guide space missions around the Earth as well as in cislunar and deep space. The ASF operates Yuanwang space support ships that track satellite and ICBM launches.

The PRC has five launch sites: four land-based and one sea-based. The ASF's China Launch and Tracking Control operates all four fixed launch sites in the PRC, in addition to Yuanwang space support ships, two major satellite control centers—Xian Satellite Control Center and the Beijing Aerospace Control Center—and the PLA TT&C system for all PRC satellites.

Reusable Spacecraft. The development of reusable spacecraft technology is part of President Xi Jinping's broader national strategy to achieve space superiority and is touted as reflective of the PRC's peaceful use of space. CASC, a SOE that has institutions focused on space technology, is leading the effort to develop and launch reusable space launch vehicles (SLV) for future space missions by 2025. The PRC's space industry is attempting to catch up with other global space competitors in reusable SLVs. PRC commercial companies have launched reusable SLVs, such as iSpace's launch of its reusable SLV, Hyperbola-2Y, on November 2, 2023, with plans to launch the Hyperbola-3 SLV to low-Earth orbit (LEO) in 2025. PRC company Landspace is planning to

launch its reusable SLV, Zhuque-3, into LEO in 2025. The heavy-lift version, Hyperbola-3B's, similar to Space-X's Falcon 9, estimated launch date is 2030. Space planes are another form of reusable technology, featuring enhanced maneuverability, making them uniquely suitable for certain missions. The PRC's reusable space plane launches in 2020, 2022, and December 2023 tested in-orbit flight time, maneuverability, systems operations, and the capacity to carry and deploy on-board payloads.

The PRC development of HGVs probably will enable further achievements in space application. The PRC is developing the Shenlong and Tengyun space planes, the former of which is reportedly similar in size to the United States' X-37B space plane.

In 2020, the PRC launched its first-ever prototype of a space plane, which stayed in orbit for 2 days before returning to Earth. Beijing stated its space plane was testing reusable spacecraft technologies as part of advancing the peaceful use of space.

Other Space and Counterspace Organizations. The PRC's space program comprises organizations in the military, civil, defense-industrial, and commercial sectors. The PLA historically has managed the PRC's space program and continues to support civilian and military interests. This includes strengthening and investing in its S&T sector, growing international partnerships, and improving the PRC's capabilities in space-based ISR, SATCOM, satellite navigation, human spaceflight, and robotic space exploration. Although SOEs are the PRC's primary space contractors, the PRC is placing greater emphasis on decentralizing and growing the commercial space sector to increase competition and enhance innovation in its space industry.

The State Council's State Administration for Science, Technology, and Industry for National Defense (SASTIND) is the primary civilian organization that coordinates and manages the PRC's space activities, including allocating space R&D funds. It maintains a working relationship with the PLA organization that oversees the PRC's military acquisitions. SASTIND guides and establishes policies for state-owned entities conducting the PRC's space activities.

The China National Space Administration (CNSA), subordinate to SASTIND, conducts the PRC's civilian space efforts, including human spaceflight at the PRC space station, lunar missions, and interplanetary missions. CNSA efforts bolster relationships with countries around the world, particularly through its BRI-linked Space Information Corridor and International Lunar Research Station initiatives, providing opportunities to cooperate on space issues. Space exploration and leadership is a key element of the PRC's strategy to demonstrate great power status.

Many space technologies can serve a civilian and military purpose and the PRC emphasizes "military-civil fusion"—a phrase used, in part, to refer to the use of civilian technologies, resources, and organizations for military use and modernization. The SSF worked with PRC universities and research organizations to incorporate civilian support to military efforts to access high-demand aerospace talent and R&D. The PRC has a growing commercial space sector that supports government objectives, including remote sensing, launch, and communication services.

The PRC has more than a hundred cooperative space-related agreements with more than three dozen countries and four international organizations and is an exporter of satellites and space technology. The PRC is inviting countries to participate on the PRC space station or International

Lunar Research Station, which is jointly led by the PRC and Russia, and has sold satellite launching services and ground stations to countries around the world.

The PRC leads the Asia-Pacific Space Cooperation Organization (APSCO), a multilateral organization with rotating leadership. Members include Bangladesh, Iran, Mongolia, Pakistan, Peru, Thailand, and Turkey, with Egypt, Indonesia, and Mexico as associate members. APSCO oversees a network of space surveillance telescopes with observation data funneled through the Chinese Academy of Science's National Astronomical Observatory of China. The organization is improving optical system capabilities, coverage, and redundancy as well as data sharing networks.

Service Readiness. Until its disbandment, the SSF routinely participated in PLA joint exercises and training, likely to evaluate and improve its ability to provide a range of support functions for joint operations. During exercises, the SSF provided reconnaissance support from space- and terrestrial-based sensors, established, and maintained command posts and communications, and conducted electronic jamming activities to support increased training realism during simulated combat scenarios. The SSF likely participated in additional joint training exercises supporting air, maritime, and conventional missile operations, including precision strikes, throughout 2023.

FORMER SSF MAJOR UNITS



JOINT LOGISTIC SUPPORT FORCE

Key Takeaways

- The JLSF is concentrating improving joint strategic and campaign-level logistic efficiencies through training and integrating civilian products and services.
- The JLSF supports multimodal transportation methods to facilitate the movement of PLA forces and equipment for training.
- During wartime or mobilization, the JLSF probably will rely on its military representative offices (MROs) and dispatch centers to route military traffic.

Service Roles and Missions. The PLA JLSF, established in 2016, supports integrated joint logistics for the PLA. The JLSF commander is Lt. Gen. Wang Liyan. The JLSF is directly subordinate to the CMC and is central to PRC efforts to build a joint, efficient "combat-oriented modern logistics system," which Beijing views as essential for modern warfare. The JLSF modernizes PLA strategic- and campaign-level logistics by overseeing theater-wide supply operations, establishing and coordinating support relationships among PLA service logistics elements, conducting joint logistics exercises with the PLA services, and integrating civilian logistics resources into military operations. JLSF exercises improve the PLA's ability to conduct joint logistics operations.

Force Structure and Organization. The JLSF, headquartered at Wuhan Joint Logistics Support Base, is comprised of at least 100,000 personnel and supports integrated joint logistics for the PLA. It operates five joint logistic support centers (JLSCs) aligned with each theater command that are intended to streamline logistics support to the PLA. Under the JLSCs' control are units that provide materiel support to the PLA and joint logistics support BDEs, who focus exclusively on supporting mobile logistics during combat operations.

Force Capabilities and Modernization. The JLSF provides the PLA with joint strategic- and campaign-level logistics, enabling large-scale operations. Elements of the JLSF who provide direct wartime support to the PLA fighting force are categorized as weapons and ammunition storage, warehousing, medical services, transport, fuel, engineering and construction management, reserve equipment, and procurement support. Since at least 2020, JLSCs have been incorporating a modular, mobile support team concept intended to provide logistics from rear depots to field depots during combat operations. These mobile support teams include logistics elements that provide ammunition, fuel, common supplies, vehicular maintenance, medical treatment, and food.

The JLSF integrates civilian resources and equipment into military operations and exercises, leveraging the PRC's civilian products, services, and transportation to improve resupply and move military personnel and equipment more rapidly. It does so primarily through MROs comprised of JLSF personnel who embed with civilian transportation companies (air, rail, road, and sea) to plan and manage military transportation. MRO personnel are vital to the JLSF's military-civilian integration efforts because they understand the technical loading procedures for various modes of transportation, can draft load plans, and provide expertise to reduce load times at points of embarkation. JLSF theater dispatch centers are the headquarters of regional MROs, coordinate PLA mobilization, and are tasked with improving the efficiency of transferring materials and

forces between transportation modes. During wartime or mobilization, the JLSF probably will rely on its MROs and dispatch centers to route military traffic.

Service Readiness. Throughout the 2023 training cycle, the JLSF improved its logistic methods with continuous combat-realistic internal logistic functional training as well as in joint PLA exercises. In March 2023, the JLSF sent 200 personnel for the first time to join the PLAN to participate in GOLDEN DRAGON-2023—a joint naval exercise with Cambodia.

PLA RESERVES, PARAMILITARY, AND MILITIA FORCES

Key Takeaways

- Interoperability and integration between the PLA, its reserve components, and the PRC's paramilitary forces continue to grow in scale and sophistication, including the coordination between the PLAN, the CCG, and the CMM.
- The PRC primarily relies on CCG and CMM in maritime disputes, selectively using the PLAN for overwatch to deter rival claimants and quickly response with force, if necessary.

THE PRC'S INTERNAL SECURITY FORCES

Ministry of Public Security. The MPS leads the PRC's civilian national police, which serves as the frontline force for public order. The key mission of the MPS is domestic law enforcement and the "maintenance of social security and order" with duties that include anti-rioting and anti-terrorism.

Ministry of State Security. The MSS is the PRC's main civilian intelligence and counterintelligence service. MSS operations include but are not limited to: protecting the PRC's national security, conducting counterintelligence, combating foreign espionage, and investigating organizations or individuals inside the PRC who carry out or direct, support, or aid other people perceived to threaten national security. On April 26, 2021, the PRC enacted a counterespionage law permitting the MSS to identify companies and organizations deemed susceptible to foreign infiltration or influence and require these institutes to implement measures to prevent foreign infiltration.

People's Armed Police. The PAP is a paramilitary component of the PRC's armed forces. Its primary missions include internal security, maritime security, and augmentation to the PLA during conflict. In 2018, the CMC centralized control of the PAP and subordinated the CCG to the PAP.

People's Liberation Army. In addition to its national defense mission, the PLA has formal and informal roles in the PRC's internal security. As the principal armed wing of the CCP, the PLA is the ultimate guarantor of the CCP's survival and supports other internal security forces as necessary. The 2020 National Defense Law recognizes this role in assigning the PLA the mission to "consolidate the leadership of the Communist Party of China and the socialist system" in addition to external defense tasks.

Militia. The PRC's militia can be mobilized for a variety of peace- and war-time missions and is distinct from the PLA's Reserve Force. The militia is organized by townships, administrative

villages, urban sub-districts, and enterprises and institutions, and the missions vary widely. In wartime, militia units assist the PLA with its military operations, conduct independent security operations, and provide support and manpower replacement to the PLA. During peacetime, the militia assists in HA/DR, supports military training, and maintains internal security. The militia is divided into two categories: primary and ordinary. The primary militia consists of former soldiers, personnel that have received military training, and personnel selected for military training under the age of 28, in good health, and politically reliable. The remainder of male citizens between 18 and 35 years of age are considered ordinary militia. The primary militia can recruit female citizens when necessary and waive the age limits under special circumstance. Local maritime militia forces, referred to by many western analysts as the Chinese Maritime Militia, safeguard maritime claims, protect fisheries, and provide logistic support, search and rescue, and surveillance and reconnaissance, often in conjunction or coordination with the PLAN and CCG.

Reserve Force Roles and Missions. The PLA Reserve Force was founded in 1983 and professionalized throughout the 1990s and 2000s. On July 1, 2020, the PRC brought the Reserve Force under the command of the Central Committee of the CCP and the CMC. The previous arrangement split control of the Reserve Force between the PLA and local CCP committees. Motivations for the change include improving combat capability, facilitating cooperation with active-duty units, and upholding the CCP's absolute leadership over the military. PRC sources stated the reform would enhance reserve performance in Tibet and Xinjiang.

The primary mission of the reserves is to reinforce active-duty forces for national defense, with a secondary mission to aid in national disasters or maintaining social order. The Reserve Force should be prepared to effectively respond to a variety of emergencies and military threats and safeguards national sovereignty, security, and development interests as well as the core security of the country.

Reserve Force Structure and Organization. The PLA Reserve Force is comprised of approximately 510,000 personnel subordinate to the Army Reserve, Navy Reserve, Air Force Reserve, and Rocket Force Reserve. According to PLA documents, active-duty personnel are the backbone of the Reserve Force but reserve-duty officers and soldiers are its foundation. The 2020 NDU's Science of Military Strategy states the building of the reserve force is an important part of national defense construction and is the basic and strategic project to consolidate national defense.

Reserve officers are selected from veteran PLA officers, local officials, PAP or militia officers, and other technical personnel. Reserve soldiers are selected from eligible PLA veterans, trained grassroots militias, and other local or military specialty personnel. Some reserve soldiers failed to meet active-duty entry requirements and conduct remedial training in the reserves until they can join the active-duty force.

The PLA Reserve Force does not include militias, the Civil Air Defense, or myriad other groups (e.g., the PAP or the Xinjiang Production and Construction Corps).

Reserve Force Capabilities and Modernization. The PLA is improving reserve mobilization, which anecdotal evidence suggests is hindered by unclear processes. In March 2023, during the PRC's annual "Two Sessions," PLA deputies suggested that the PRC should study and prioritize

wartime legislation, including the introduction of laws, such as the mobilization of reserve forces. As of early 2024, the PLA Reserve Force equipment inventories are considered mostly outdated.

Reserve Force Readiness. During his annual New Year's greeting and troop inspection of PLA personnel in January 2023, Xi emphasized the importance for the military—including members of the Reserve Force—to strengthen its combat readiness. Reserve Force personnel drill with active-duty units to train their combat support capabilities. Reservists maintain their readiness posture to support disaster relief efforts during emergency situations.

POTENTIAL PLA RESERVE FORCES (SEPARATED ENLISTEES)

In March 2023, the PRC implemented its newly revised Reservists Law, which delays the retirement age for Reserve Force officers from 55 to 60. Another option for demobilized personnel is to enter the expanding ranks of non-active-duty contract civilians, some of whom are assigned to the system of local headquarters responsible for conscription. The PLA has for years focused recruitment efforts of civilians with specialized knowledge to serve in management or professional technical military posts; these civilian personnel are not in active service unless deemed necessary. Recruitment priority and preference are given to degree holders in science, technology, or engineering as well as to those with skills and expertise considered crucial to combat training. As of 2020, the PLA reportedly employed up to 40,000 contracted civilians who could be mobilized during a wartime or conflict scenario.

People's Armed Police

PAP Roles and Missions. On July 1, 2020, the standing committee of the PRC's legislature, the NPC, approved a revision to the *Law on the People's Armed Police Force*, which officially recognized the CMC's singular command of the PAP, identified the PAP as an important part of the armed forces under the leadership of the CCP, and affirmed its primary mission set of handling security emergencies, maintaining stability, conducting counterterrorism operations, and executing maritime law enforcement and rescue. This legal amendment codified and deepened the substantial reforms of 2018, when command of the PAP was centralized under the Central Party Committee and the CMC after decades of dual-leadership under the CMC and State Council (a PRC government body), the CCG was subordinated to the PAP, and myriad auxiliary duties (e.g., protecting gold mines, firefighting) were removed from the PAP's purview to focus its mission on PRC domestic and international security. PRC media noted that the 2020 PAP reforms included an article that permitted the PAP to conduct certain operations, including counterterrorism training, outside of the PRC.

PAP Force Structure and Organization. The PAP is a component of the PRC's armed forces and an armed wing of the CCP with an estimated 500,000 personnel. In the 2020 NDU's Science of Military Strategy, the primary responsibilities of the PAP include maintaining political, institutional and regime security, handling emergency rescue, counterterrorism, air support, maritime rights protection, administrative law enforcement, and defense operations. The PAP is

organized into three main parts: the Internal Security Corps, the Mobile Corps, and the CCG. The Internal Security Corps covers each of the PRC's provinces, provincial-level cities, and autonomous regions. A permanent presence of the PAP in the Special Administrative Regions (SARs) of Hong Kong or Macao has not been reported yet; however, since the 2019 pro-democracy protests, the PRC has maintained a rotational deployment of PAP forces in Hong Kong. The Mobile Corps is comprised of myriad PAP units placed to reinforce the Internal Security Corps and provide flexibility in responding to internal security issues. The 1st Mobile Contingent is in Shijiazhuang just south of Beijing, with subordinate units in the north-central part of the country and would likely reinforce PAP units in the event of a threat to the regime in Beijing. The 2nd Mobile Contingent is based in Fuzhou, with units concentrated in Fujian and surrounding provinces along the southeast coast. It has a key role of supporting the PLA in preparation for a possible conflict across the Taiwan Strait. Xinjiang is a particular focus of the PAP due to alleged separatist activity as well as its proximity to areas of unrest in Central Asia.

PAP Capabilities and Modernization. The PAP routinely conducts civil-support operations. In 2023, the PAP mobilized multiple rescue forces to the Gansu Province in response to a 6.2 magnitude earthquake. Approximately 330 officers were the first on site after the disaster, carrying out search and rescue operations, repairing roads, transporting supplies, and setting up tents. The PAP mobilized over 5,000 personnel in 2023 to assist in evacuating civilians effected by flooding in the Heilongjiang and Jilin provinces following Typhoon Doksuri.

PAP Readiness. The PAP prepares to support the PLA. In 2018, Xi called on the PAP to improve its "combat ready training" and "speed up its integration with the PLA's join operation system," pointing to an increased emphasis on coordination during peace and war. In 2023, the PAP, militias, and the PLAA jointly held "Emergency Mission 2023," which focused on earthquake relief and aimed to improve integrated emergency response capabilities. In 2022, the PAP conducted SOF training, including a maritime tactical joint exercise in June with PLANMC. A PAP officer was named as the commander of the PLA garrison in the Hong Kong SAR in 2022. Integration with the PLA's joint operations systems continues to be a main priority for Xi to ensure a "world-class military" by mid-century.

China Coast Guard

CCG Service Roles and Missions. The CCG is subordinate to the PAP and responsible for a wide range of maritime security missions, including defending the PRC's sovereignty claims; combating smuggling, terrorism, and environmental crimes; and supporting international cooperation in accordance with relevant international treaties. The Standing Committee of the PRC's NPC passed the Coast Guard Law, which took effect on February 1, 2021. The legislation regulates the duties of the CCG, including the use of force, and applies those duties to seas under the jurisdiction of the PRC. The law was met with concern by other regional countries that perceive the law as an implicit threat to use force, especially as territorial disputes in the region continue. The CCG is the PRC's front-line force for carrying out "rights protection" (*weiquan*) operations in disputed areas of the PRC's maritime periphery. The PLAN overwatches CCG operations to deter other claimants and provide the PRC an option to rapidly respond with force, if necessary.

CCG Capabilities and Modernization. The CCG's continued expansion and modernization makes it the largest maritime law enforcement fleet in the world. Newer CCG vessels are larger and more capable, enabling them to operate farther off shore and remain on station longer. The

CCG has over 150 regional and oceangoing patrol vessels (more than 1,000 tons). These larger vessels include over 20 corvettes transferred from the PLAN, which were modified for CCG operations. The newer, larger CCG vessels are equipped with helicopter facilities, high-capacity water cannons, multiple interceptor boats and guns ranging from 30 mm to 76 mm. Revised estimates indicate the CCG operates more than 50 regional patrol combatants (more than 500 tons), which can be used for limited offshore operations, and an additional 300 coastal patrol craft (100 tons to 499 tons). In 2023 and early 2024, the CCG launched seven offshore patrol ships as well as two additional patrol ships based on a large salvage ship design. Several more offshore patrol ships are likely under construction.

CCG Readiness. The CCG continues to operate in alignment with the Coast Guard Law, asserting the PRC's claims in the East and South China Seas and Taiwan Strait, in what the law considers the "waters under the jurisdiction of China." In these regions, the CCG uses aggressive tactics against foreign vessels, such as ramming, firing water cannons, and performing dangerous maneuvers, frequently working alongside the PLAN and CMM. The CCG annually sends two vessels on a month-long fisheries law enforcement patrol in the North Pacific. These patrols support the PRC's membership in the Convention on the Conservation and Management of High Seas Fisheries Resources in the North Pacific Ocean.

China Maritime Militia

CMM Roles and Missions. The CMM is a component of the PRC's armed forces; it operates under military control and is ultimately subordinate to the PRC's CMC through local PLA commands. The PRC states that the CMM helps uphold the PRC's sovereignty and security. In peacetime, the CMM's primary role is to assert and advance Beijing's maritime territorial claims—what the PRC calls "rights protection" (*weiquan*)—in disputed areas of the PRC's maritime periphery. In wartime, the CMM may support combat operations by conducting reconnaissance or creating obstacles and providing logistical support to other PLA forces. The CMM operates in all areas inside the FIC: the Bohai Gulf, the Yellow Sea, the ECS, and the SCS—where the CMM has conducted numerous operations.

CMM Force Structure and Organization. The CMM is a subset of the PRC's national militia, an armed reserve force of civilians available for mobilization ultimately subordinate to the CMC and managed through the NDMD. Throughout the PRC, militia units organize around towns, villages, urban sub-districts, and enterprises and vary widely in composition and mission.

Through the NDMD, Beijing subsidizes various local and provincial commercial organizations to operate CMM vessels to perform "official" missions on an ad hoc basis outside of their regular civilian commercial activities. CMM units employ marine industry workers, usually fishermen, as a supplement to the PLAN and the CCG. While retaining their day jobs, these mariners are organized and trained, often by the PLAN and the CCG, and can be activated on demand.

CMM Capabilities and Modernization. CMM vessels train with and assist the PLAN and the CCG in asserting maritime claims, surveillance and reconnaissance, fisheries protection, logistics support, and search and rescue. The CMM operates in all areas inside the FIC—the Bohai Gulf, the Yellow Sea, the ECS, and the SCS—where the CMM has conducted numerous operations. The PRC employs the CMM in gray zone operations, or "low-intensity maritime rights protection struggles," at a level designed to frustrate effective response by the other parties involved. The

CMM plays a major role in coercive activities to achieve the PRC's political goals without fighting. These operations are part of broader PRC military theory that uses confrontational operations short of war to accomplish strategic objectives.

The CMM is very active. In 2023, the number of CMM vessels in and around the SCS increased by approximately 35%, with an average of 195 vessels observed per day. Similarly, from September 2021 to September 2022, maritime militia vessels were a constant presence near Iroquois Reef in the Philippines EEZ.

The CMM protects and facilitates PRC fishing vessels operating in disputed waters. From late December 2019 to mid-January 2020, a large fleet of over 50 PRC fishing vessels operated under the escort of multiple CCG patrol ships in Indonesian claimed waters northeast of the Natuna Islands. At least a portion of the PRC ships in this fishing fleet were affiliated with known traditional maritime militia units, including a maritime militia unit based out of Beihai City in Guangxi province. While most traditional maritime militia units operating in the SCS continue to originate from townships and ports on Hainan Island, Beihai is one of several increasingly prominent maritime militia units based out of provinces in mainland China. These mainland-based maritime militia units routinely operate in the Spratly Islands and in the southern SCS. Their operations in these areas are enabled by increased funding from the PRC government to improve their maritime capabilities and grow their ranks of personnel.

Since 2014, the PRC has built a new Spratly backbone fleet comprising at least 235 large steel-hulled fishing vessels, many longer than 50 meters and displacing more than 500 tons. These vessels were built under central direction from the PRC government to operate in disputed areas south of 12 degrees latitude that the PRC typically refers to as the "Spratly Waters," including the Spratly Islands and southern SCS. Spratly backbone vessels were built for prominent CMM units in Guangdong, Guangxi, and Hainan Provinces. For vessel owners not already affiliated with CMM units, joining the militia was a precondition for receiving government funding to build new Spratly backbone boats. As with the CCG and PLAN, new facilities in the Paracel and Spratly Islands enhance the CMM's ability to sustain operations in the SCS.

Starting in 2015, the Sansha City Maritime Militia in the Paracel Islands has been developed into a salaried full-time maritime militia force with its own command center and equipped with at least 84 purpose-built vessels armed with mast-mounted water cannons for spraying and reinforced steel hulls for ramming. Freed from their normal fishing responsibilities, Sansha City Maritime Militia personnel—many of whom are former PLAN and CCG sailors—train for peacetime and wartime contingencies, often with light arms, and patrol regularly around disputed SCS features even during fishing moratoriums.

CCM Force Readiness. The PLAN and CCG provides training and conducts joint exercises with the CMM to prepare for wartime missions, such as mobilization and logistics, reconnaissance, and safeguarding maritime claims. The CMM is included in Xi's vision for "world-class forces" by mid-century, as articulated at the 19th Party Congress in October 2017.

SPECIAL OPERATIONS FORCES

Key Takeaways

- Despite unilateral and multilateral training, all the PRC's SOF units lack real-world combat experience.
- PRC SOF do not have a national-level special operations command to oversee all PRC SOF activities.
- Despite an emphasis on joint training, theater commanders have no authority over PAP units, making it difficult to incorporate PAP SOF into PLA training exercises.
- The PRC categorizes its non-traditional security threats as terrorism (domestic and international), separatism (entities seeking to break away from the PRC, such Taiwan, Tibet, and the Uyghur minority population in western China), and extremism (primarily religious).

In late 2015, the PRC's SOF were impacted by a series of reforms aimed to "reorganize troops and rebuild new-type combat forces. New types of combat forces have been enhanced to conduct special operations, all-dimensional offense and defense, amphibious operations, far seas protection, and strategic projection, aiming to make the force composition complete, combined, multi-functional, and flexible." In 2016, additional changes to PRC law authorized the SOF to operate outside of the PRC's borders.

Service Roles and Mission. The PRC's SOF are tasked with three primary missions: direct action, special reconnaissance, and counterterrorism. The goal of the PRC's SOF operations is to prepare the battlefield for conventional force counterparts by attacking critical areas, degrading enemy operational systems and capabilities, and delaying or disrupting enemy operational activities. In conventional warfare, the PRC's SOF missions include disrupting rear echelon formations and activities, destroying or securing key targets, decapitation, and targeting for fire support. The PRC's SOF can conduct HA/DR missions, noncombatant evacuation operations (NEO), and personal security assignments. While PLA SOF can perform counterterrorism missions, the PAP SOFs are specifically tasked with this mission. The PRC categorizes its non-traditional security threats as terrorism (domestic and international), separatism (entities seeking to break away from the PRC, such Taiwan, Tibet, and the Uyghur minority population in western China), and extremism (primarily religious).

PLAA SOF. PLAA SOF BDE missions include raids, harassment operations, target seizure and control, special reconnaissance, precision strike guidance, and rescue operations. Most GAs in the PLAA, as well as WTC Military Districts, have SOF units. In a 2022 exercise, the 74th GA SOF BDE conducted coastal maritime training simulating dangerous battlefield and training conditions on the coast. In September 2020, attack and transport helicopters from the 73rd GA held air assault training with elements from a 73rd GA SOF BDE. That same month, elements from a STC SOF BDE deployed to a new training area for a command post exercise and force-on-force exercise.

PLANMC SOF. PLANMC SOF train to conduct ground-based special operations, as well as coastal and maritime missions, including maritime counterterrorism, HA/DR, NEO and visit, board, search, and seizure operations. They train for more than a year learning airborne, rappelling, reconnaissance, secure communication, navigation, driving, search and seizure, demolition, and

hand-to-hand combat skills. They practice deploying rubber boats and fast-roping from helicopters into the water. In December 2020, PLANMC SOF participated in a combined arms island seizure exercise with mechanized infantry units, using mine-clearing line charges to destroy obstacles with sniper teams in overwatch.

PLAAF Airborne Corps SOF. The PLAAF Airborne Corps (PLAAFAC) SOF, created in 2011, trains for airborne insertions from various altitudes, including high-altitude/low-opening and high-altitude/high-opening insertions, to support follow-on operations, such as long-range infiltration behind enemy lines and critical target seizure. In 2022, the PLAAFAC SOF conducted day and night airborne training over complex terrain to improve its ability to conduct airborne infiltration operations at various hours of the day, in various conditions, and over various terrain.

PLARF Reconnaissance Regiment. The PLARF Reconnaissance Regiment, which is based in Qinghai, is the primary special operations component and can conduct air, land, and sea missions, including counter-ISR, strategic asset protection, special reconnaissance, and target acquisition.

PAP SOF. The PAP has three main SOF units assigned to the two mobile contingents and the Xinjiang Military District. The Mountain Eagle Commando Unit, created in 2019 and based in Xinjiang, is trained for counterterrorism missions in the province. The other two PAP SOF units, the Snow Leopards Commando Unit and the Falcon Commando Unit, are large rapid reaction forces with mixed capabilities to deploy in major contingencies on a national level. These units are trained in counterterrorism missions along with hostage rescue and include assault, reconnaissance, explosive ordnance disposal, and sniper teams. The Snow Leopards have strict selection standards with a 40%–50% of recruits failing the initial screening. The Snow Leopards' annual "Devil Week" training simulates counterterrorism missions in multiple combat environments, including desert, jungle, urban terrain, air, and sea.

The PRC's SOF has between 20,000 and 30,000 personnel. The PRC's SOF units are comprised of experienced and noncommissioned officers with new conscripts and officers assigned following their graduation from basic training or a military academy, including the Special Operations Academy in Guangzhou. SOF conscripts are selected from volunteers, suggesting they are among the most qualified that commit to a 2-year term of service. After their 2-year commitment, the conscripts are offered to continue service as noncommissioned officers.

Service Force Structure and Organization. Beginning in January 2016, the PLA underwent reforms that impacted the PLA SOF. The seven military regions were reorganized into five theater commands (TCs) and five of the 18 GA were deactivated. The PLA SOF were reorganized, assigning a SOF BDE to each GA along with a SOF BDE for the Xinjiang and Tibet Military Districts. These and later reforms impacted the PLARF Reconnaissance Regiment, the PLAAFAC SOF BDE, and PAP SOF units.

Service Capabilities and Modernization. Each PLA SOF BDE has between 2,000 and 3,000 personnel while a regiment has between 1,000 and 2,000 personnel. While PLA SOF units have discrete missions based on branch and location, their internal structure resembles the PLAA BDE-battalion-company-team construct.

The PAP has three SOF units, consisting of six detachments. Three detachments are assigned to the 1st Mobile Contingent based in Beijing, two detachments are assigned to the 2nd Mobile Contingent based in Guangzhou, and one detachment falls under the Xinjiang Internal Contingent.

There is no national-level special operations command responsible for all SOF activities. PLA SOF does not have organic or dedicated infrastructure or support and, therefore, must rely on conventional forces to support their missions whereas the PAP has an internal logistic support system to support its SOF missions.

Major PAP and PLA SOF Units

Higher Headquarters	Unit	Unit Name
Central Military Commission	People's Armed Police	Snow Leopards Commando Unit
		Falcon Commando Unit
		Mountain Eagle Commando Unit
Northern Theater Command	78th Group Army SOF BDE	Tigers of the Northeast
	79th Group Army SOF BDE	Lions
	80th Group Army SOF BDE	Falcons
Eastern Theater Command	71st Group Army SOF BDE	Sharks
	72nd Group Army SOF BDE	Thunderbolts
	73rd Group Army SOF BDE	Dragons of the East Sea
Southern Theater Command	74th Group Army SOF BDE	Unknown
	75th Group Army SOF BDE	Sword of the South
	PLAN Marine Corps SOF BDE	Sea Dragons
Western Theater Command	76th Group Army SOF BDE	Sirius
	77th Group Army SOF BDE	Cheetahs
	Xinjiang Military District SOF BDE	Snowy Owls
		Sharp Blade of the Kunlun
	Tibet Military District SOF BDE	Snow Leopards of the Plateau
Central Theater Command	PLARF Reconnaissance Regiment	Sharp Blade
	PLAAF Airborne Corps SOF BDE	Leishen ("Thunder God") Commando Unit
	81st Group Army SOF BDE	Sacred Sword of the East
	82nd Group Army SOF BDE	Whistling Arrows
	Former 83rd Group Army SOF BDE	Ferocious Tigers of the Central Plain

Service Readiness. The PRC's SOF focus on individual and squad-level training; however, they have participated in larger combined arms and joint exercises. SOF training entails physical fitness training, close quarters combat, individual and team survival, camouflage, weapons proficiency, land navigation, and communication. All PRC SOF units are airborne and air assault capable.

The reforms under Xi gave theater commanders authority over a wider range of forces, including PLA SOF, while emphasizing joint training. However, these reforms did not create joint task forces to encourage increased coordination between the services. It is unclear whether the PRC's SOF units from different services train together or with conventional forces, the exception being

PLAAF aircraft for PLAA SOF airborne training. There is no evidence that PAP SOF units have participated in joint exercises with any PLA forces.

In 2002, the PLA began participating in multinational training exercises. Since then, PRC's SOF personnel and units, including PAP SOF, have taken part in several foreign events, primarily focused on counterterrorism. Some of these events were held with units from Belarus, India, Pakistan, Sri Lanka, Mongolia, Russia, Thailand, Indonesia, Malaysia, and Jordan. In the last decade, individual PLA SOF personnel and small units have participated in training in Israel, Turkey, Estonia, Colombia, and Venezuela. In August 2021, PLA SOF participated in joint training exercise ZAPAD with their Russian counterparts to help maintain security and stability in the Transbaikal region. Supported by Y-20 transport aircraft, PLA SOF focused training on large-scale airborne exercises, including heavy equipment insertion. Of note, the PAP's Snow Leopards have won the International Warrior Competition held at Jordan's King Abdullah II Special Operations Training Centre in Amman several times.

The PRC's SOF units are equipped with the most modern domestically produced weapons and equipment, including advanced communication and electronics, unmanned aerial systems ranging from micro-UAVs to the medium-altitude long-endurance platforms, night vision devices, targeting devices, parachutes, and light vehicles, boats, and aircraft. PLA SOF units tasked with clandestine maritime missions are equipped with diver navigation aids, radios, undersea sensors, diver propulsion systems, underwater personnel delivery systems, and handheld direction-finding sonars for low-visibility underwater environments.

Most PLA ground SOF units appear to be elite light infantry units who can insert behind enemy lines but are limited by their conventional force counterpart's ability to support their mission. PLA SOF BDEs emphasize a "centralized command style"—common in conventional units—as opposed to a more flexible "task-oriented command style" via radio and satellite communications. PLAA SOF BDEs include liaison officers from pertinent PLAN, PLAAF, PLARF, and aviation units in their command post to facilitate SOF missions in support of theater command operations. PLA SOF BDEs face the same C2 issues that conventional PLA BDEs encounter. For example, in 2019, voice communications were difficult to maintain using single-function and limited bandwidth radios and satellite communications terminals which limited communication between the BDE and below conventional forces as well as the supporting SOF battalion and below forces.

Many U.S. SOF activities do not fall under the purview of PRC SOF missions. PLA SOF do not conduct military information support operations (also known as psychological operations). Elements in the PLA Political Department System perform these operations. PLA SOF units can assist in larger information support operations but would not be in command. PLA SOF do not have units equivalent to U.S. Army Civil Affairs units.

HA/DR is a mission of all PLA, PAP, and militia units in conjunction with local civilian authorities. The PRC's SOF may provide communications and reconnaissance support in remote areas but would not be the lead agency for HA/DR missions.

The PLAA and PLAAF lack aviation assets to conduct long-range insertions of PLA SOF to conduct strategic-level direct action or reconnaissance, but they can conduct air insertions of SOF in support of theater operations. Helicopters transport SOF for airborne and air assault missions. All PLA airborne-qualified SOF train in fixed-wing aircraft, such as the Yun-5 biplane.

Since 2008, approximately 70 PLANMC SOF personnel at a time have deployed to the Gulf of Aden aboard PLAN vessels as part of the PRC's counterpiracy operations. In 2015, PLA SOF conducted search and rescue, medical evacuation, and force protection operations in Nepal following an earthquake. Also in 2015, PLANMC SOF helped evacuate foreign nationals due to the war in Yemen. In 2017, PLANMC SOF recaptured a hijacked freighter from Somali pirates in the Gulf of Aden. In 2020, PLA SOF from the Tibet Military Region deployed to the border with India following clashes between PRC and Indian forces along the LAC.

MILITARY READINESS

The CMC sought to improve PLA combat readiness and joint interoperability, reinforcing these longstanding priorities through military training mobilization orders and senior leadership guidance. In 2023, the PLA began to implement a new military training system, probably indicating a recognition that current training is not adequately preparing the combat readiness of its forces. In November 2023, Xi expressed that strengthening training and combat readiness is a priority of the CMC.

Throughout 2023, the PLA conducted a range of joint exercises. In April 2023, the PLA probably held a high state of readiness through Tsai Ing-wen's transit of the United States to meet the U.S. Speaker of the House. Following Tsai Ing-wen's visit, the PLA took part in JOINT SWORD, a major naval exercise east of Taiwan, featuring PLAN vessels conducting exercise operations in the vicinity of Taiwan and conducting combined arms exercises on islands to the east of Taiwan. JOINT SWORD was the first PLA exercise in which an aircraft carrier simulated targeting Taiwan. In September, a PLAN carrier group sailed 60 nm southeast of Taiwan for an exercise in which 11 aircraft crossed into Taiwan's air defense identification zone (ADIZ).

The PLA trained with foreign military partners. In 2023, the PLA conducted at least 19 bilateral and multinational exercises—many with Southeast Asian countries: naval drills, counterterrorism and humanitarian assistance, and live-fires. Military engagement with Southeast Asian countries enables the PRC to promote itself as a regional partner and provides the opportunity for the PLA to observe the military capabilities of its neighbors.

PLA CAPABILITIES IN DEVELOPMENT

Key Takeaways

- The PLA is aggressively developing capabilities to provide options for the PRC to dissuade, deter, or, if ordered, defeat third-party intervention in the Asia-Pacific region.
- The PLA continues developing the capabilities to conduct military operations deeper into the Indo-Pacific region and globally.
- The PLA has undertaken important structural reforms and introduced new military doctrine to strengthen joint operations and is testing joint capabilities in and beyond the FIC.

Joint Capabilities for Counter Intervention. The PLA is improving its ability to deter or defeat adversary military "intervention" in a regional conflict along the PRC's periphery and the broader Asia-Pacific region. The PLA's A2AD—also known as counter intervention—capabilities are the most robust in the FIC although the PLA is increasingly able to project power into the Philippine Sea and the PRC seeks to strengthen its capabilities to reach farther into the Pacific Ocean.

Information Operations. Beijing aims to create an information environment favorable to the PRC and its strategic foreign policy objectives. The PRC conducts influence operations targeting media organizations, businesses, academic and cultural institutions, and policy communities of the United States, other countries, and international organizations to achieve outcomes favorable to CCP strategic and military objectives.

PRC messaging to Indo-Pacific countries probably seeks to cast the United States and its allies as untrustworthy external actors interfering with internal affairs, hegemonic regional aggressors, and violators of international law. Beijing likely uses official government statements, state-run media, and online disinformation to promote a narrative that Washington seeks to initiate a new Cold War by pressuring Indo-Pacific countries to ally with the United States and strategically encircle the PRC. The PRC's Indo-Pacific messaging efforts further recast Washington's regional engagements and partnerships, including the Quad and AUKUS, as hegemonic efforts to effectuate bloc-based regional confrontation and undermine regional stability.

PRC defense officials have used instances of U.S. freedom of navigation operations in the SCS and transits in the Taiwan Strait to advance the narrative that the United States seeks to violate international law and territorial sovereignty of Indo-Pacific nations to assert regional hegemony. During the 2023 Shangri-La Dialogue, then PRC Defense Minister Li Shangfu issued official statements alleging U.S. Navy freedom of navigation operations were a pretext for Washington to "conduct navigational hegemony" after an unsafe PLA naval maneuver in front of a U.S. warship in the Taiwan Strait likely increased the risk of a collision.

The PRC has synchronized official government statements and state-media to define U.S. Indo-Pacific alliances as acts of unlawful and destabilizing hegemonic aggression intended to pressure regional countries to support U.S. efforts to contain the PRC. In late-2023, Chinese and Russian official statements and state media promoted a false narrative—despite regional concerns—that the United States supported Japan, a Quad partner, in illegally dumping nuclear-contaminated water into the Pacific Ocean. Earlier in 2023, PRC official statements and state media sought to inaccurately characterize the AUKUS partnership as a hegemonic nuclear-powered submarine cooperation agreement that undermined the international nuclear non-proliferation regime and the stability of the Indo-Pacific region.

PRC state media actors have conducted disinformation campaigns to spread anti-U.S. narratives in Indo-Pacific countries, to include opposing deepening diplomatic relations with the United States and accusing Washington of interfering in Indo-Pacific countries' domestic affairs. As recently as March 2024, PRC state media and unattributed PRC social media campaigns almost certainly sought to spread disinformation that the United States was interfering in the Solomon Islands general election. PRC actors probably advanced a host of anti-U.S. narratives, including Russian disinformation that the U.S. Agency for International Development sought to influence the election through "democracy promotion" activities and a conspiracy theory that Washington was attempting to assassinate Solomon Islands Prime Minister Manasseh Sogavare. In November

2023, South Korea's National Intelligence Service identified two PRC public relations firms creating websites that impersonated authentic Korean news outlets to spread propaganda decrying South Korea's participation in the U.S.-led Summit for Democracy.

Space and Counterspace Operations. The PRC has devoted considerable economic and technological resources to growing all aspects of its space program, improving military space applications, developing human spaceflight, and conducting lunar and Martian exploration missions. In 2023, the PRC conducted 67 space launches, placing over 200 satellites in orbit, second only to the United States in the number of space launches. The PRC will continue to launch a range of satellites that substantially enhance its ISR capabilities, field advanced communications satellites able to transmit large amounts of data, increase PNT capabilities, and deploy new weather and oceanographic satellites.

ISR Satellites. The PRC employs a robust space-based ISR capability designed to enhance its worldwide situational awareness. Used for military and civilian remote sensing and mapping, terrestrial and maritime surveillance, and intelligence collection, the PRC's ISR satellites are capable of providing EO and SAR imagery as well as electronic and signals intelligence data. The PRC exports its satellite technology globally, including its domestically developed remote-sensing satellites.

Communication Satellites. The PRC owns and operates more than 60 communications satellites, with at least four dedicated to military use. The PRC produces its military-dedicated satellites domestically. Its civilian communications satellites incorporate off-the-shelf commercially manufactured components. The PRC is fielding advanced communications satellites capable of transmitting large amounts of data. Existing and future data relay satellites and other beyond-LOS communications systems could convey critical targeting data to PRC military operation centers.

Navigation/PNT Satellites. The PRC's satellite navigation system, BeiDou, is an independently constructed, developed, and exclusively PRC-operated PNT service. The PRC's priorities for BeiDou are to support national security and economic and social development by adopting PRC PNT into precise agriculture, monitoring of vehicles and ships, and aiding with civilian-focused services across more than 100 countries in Africa, Asia, and Europe. BeiDou provides all-time, all-weather, and high-accuracy PNT services to users domestically, in the Asia-Pacific region, and globally and consists of 49 operational satellites.

Space Launch. The PRC is improving its space launch capabilities, ensuring an independent, reliable means to access space and compete in the international space launch market. The PRC continues to improve manufacturing efficiencies and launch capabilities overall, supporting human spaceflight and deep-space exploration missions—including to the Moon and Mars.

The PRC has developed and probably will continue to develop weapons for use against satellites in orbit to degrade and deny adversary space capabilities. The PRC's counterspace development efforts include orbital counterspace systems with EW and directed-energy weapons systems. The PRC has launched multiple ground-based anti-satellite (ASAT) missiles that can destroy satellites and developed mobile jammers to deny SATCOM and Global Positioning System (GPS).

Orbital Threats. The PRC is developing other sophisticated space-based capabilities, such as satellite inspection and repair. At least some of these capabilities could function as a weapon. The

PRC has launched multiple satellites to conduct scientific experiments on space maintenance technologies and is researching space debris cleanup. Over the past two years, the PRC has launched multiple satellites to conduct scientific experiments and to verify new technologies. In January 2022, Shijian-21 moved a derelict BeiDou navigation satellite to a high graveyard orbit above GEO. The Shijian-17 is a PRC satellite with a robotic arm. Space-based robotic arm technology could be used in a future system for grappling other satellites.

Directed-Energy Weapons. During the past two decades, PRC defense research has proposed the development of several reversible and nonreversible counterspace directed-energy weapons for reversible dazzling of EO sensors and even potentially destroying satellite components. The PRC has multiple ground-based laser weapons of varying power levels to disrupt, degrade, or damage satellites, including a limited capability to employ laser systems against satellite sensors. By the mid- to late-2020s, the PRC may field higher power systems to extend the threat to the structures of non-optical satellites.

ASAT Missiles. In 2007, the PRC destroyed one of its defunct weather satellites more than 800 km above the Earth with an ASAT missile. This destructive test generated more than 3,000 pieces of trackable space debris, of which more than 2,700 remain in orbit. Most will continue orbiting the Earth for decades. The PRC probably intends to pursue additional ASAT weapons that can destroy satellites up to GEO. In 2013, the PRC launched an object into space on a ballistic trajectory with a peak orbital radius above 30,000 km, near GEO altitudes.

Cyber Operations. The PLA almost certainly is pursuing cyber capabilities to use in a crisis or conflict to degrade systems the U.S. military relies on for power projection. PRC-linked cyber actors have targeted a wide range of government, critical infrastructure, and business networks in the United States and Japan, including those that support the U.S. and Japanese forces. Since at least 2019, a group of PRC state-sponsored cyber actors, known publicly as Volt Typhoon, has been compromising and prepositioning itself on U.S. critical infrastructure organizations' networks to enable disruption or destruction of critical services in the event of increased geopolitical tensions or military conflict with the United States and its allies. Volt Typhoon's targets span multiple critical infrastructure sectors, including communications, energy, transportation systems, and water—in the continental and non-continental United States and its territories, including Guam. PRC cyber actors may target Guam to counter U.S. power projection, given the PRC's perceptions of the island's importance for U.S. military operations in the Indo-Pacific. The PRC can use access to critical infrastructure targets to launch cyberattacks that, at a minimum, can cause localized, temporary disruptions.

In addition to critical infrastructure, PRC cyber actors continue to target U.S. defense organizations and contractors, likely for intelligence collection and cyberattack prepositioning. PLA texts emphasize using cyber operations and other capabilities to degrade adversary C4ISR, weapon systems, and support nodes early in a conflict to seize information dominance.

Long-Range Precision Strike. PLA texts state that precision attack in all warfare domains is critical in modern war. The PLA further notes that small elite forces using advanced weapons or capabilities can attain military effects that previously required large armies and much higher levels of damage and cost. Therefore, PLA writings state that precision weapons are not only force multipliers but also a means of "war control" to prevent escalation. PLA documents further state

that the range of vital political, economic, and military targets has grown as the advanced globalized economy develops, implying that growing PLA strike capabilities will attack an increasing array of targets and, thereby, attain international strategic effects by striking critical nodes of the global economy during a future conflict.

The PRC's military modernization efforts have rapidly transformed the PLA's missile force. The force is increasingly capable of conducting strikes against regional air bases, logistics and port facilities, communications, and other ground-based infrastructure—targets that PLA writings discuss as adversary vulnerabilities. The PLA can reach U.S. bases in Guam with ballistic and cruise missiles. In the future, PLA LACMs will likely be deployable on surface platforms like the RENHAI class guided-missile cruisers. H-6K bomber flights into the Philippine Sea demonstrate the PRC's ability to range Guam with air-launched LACMs. The DF-26 intermediate range ballistic missile is a capable of ranging Guam and can conduct nuclear, precision conventional, and maritime attacks.

The PRC views its ability to acquire timely, high-fidelity information as critical to executing precision strikes. The PLA's information support system for precision strikes depends heavily on former SSF assets to detect, identify, target, and assess battlefield damage. The PRC emphasizes the importance of space-based surveillance capabilities in supporting precision strikes and, in 2022, continued to develop its constellation of military reconnaissance satellites that could support monitoring, tracking, and targeting of U.S. and allied forces. The PRC is investing in reconnaissance, surveillance, command, control, and communications systems at the strategic, operational, and tactical levels for high-fidelity OTH targeting information for its strike platforms.

IADS. The PRC has a robust and redundant IADS architecture over land areas and within 300 nm (556 km) of its coast that relies on an extensive early warning radar network, fighter aircraft, and a variety of SAM systems. The PLA operates radars and air defense weapons on outposts in the SCS, further extending the range of its IADS. The PLA employs point defenses, primarily to defend strategic targets against adversary long-range cruise missiles and airborne strike platforms.

The PLA has increasing numbers of advanced long-range SAMs, including its indigenous CSA-9 (HQ-9) and its follow-on HQ-9B, Russian SA-10 (S-300PMU), and SA-20 (S-300PMU1/PMU2), all of which have the advertised capability to protect against aircraft and low-flying cruise missiles. To improve its strategic air defenses, the PLA possesses Russian-built SA-21 (S-400) Triumf SAM systems as a follow-on to the SA-20. Compared to these other systems, the SA-21 systems possess a longer maximum range, improved missile seekers, and more sophisticated radars.

The PRC manufactures a variety of long-range air surveillance radars, including models claiming to support BMD and others asserting the ability to detect stealth aircraft. Marketing materials emphasize these systems' ability to counter long-range airborne strike and combat support aircraft. PLAAF AEW&C aircraft, such as the KJ-2000 and KJ-500, can further extend the PRC's s radar coverage well past the range of its ground-based radars.

Ballistic and Cruise Missile Defense. The PRC is developing BMD systems with exo-atmospheric and endo-atmospheric kinetic-energy interceptors. The PRC is pursuing a mid-course interceptor that may have capabilities against IRBMs and possibly ICBMs and, in April 2023, announced a successful mid-course missile intercept test. The Type-055 Destroyer has been identified as a platform for mid-course intercept capabilities, suggesting the PRC will have forward

deployed missile defense soon. The HQ-19 interceptor has undergone tests to verify its capability against 3,000 km-class ballistic missiles. The PLA's long-range SAM inventory offers a limited capability against ballistic missiles. The PRC's domestic CSA-9 (HQ-9) long-range SAM system likely has a limited capability for point defense against tactical ballistic missiles. The PLA has SA-20 (S-300 PMU2) SAMs and SA-21 (S-400) SAMs that may have some capability to engage ballistic missiles, depending on the interceptors and supporting infrastructure. The PLA's cruise missile defense capability is more robust than that of its BMDs, with short-to-medium range SAMs, such as the HQ-22, augmenting the PLA's long-range SAMs in this role.

Surface and Undersea Operations. The PLAN is one of the main sources of the PLA's 'counterattack' capabilities and would use its forces to conduct strategic counterattacks against enemy air assets on air bases and airfields and against enemy sea formations using maritime joint fire strikes and ASW. All of the PLAN's combatants carry some type of anti-ship missile, some of which can be linked to the PRC's robust C4ISR network to enable long-distance targeting. Many of the PLAN's smaller combatants, such as the JIANGDAO FFLs and the JIANGKAI II FFGs, carry the sea-skimming, sub-sonic YJ-83 ASCM with a range of 135 nm. The LUYANG II DDGs are equipped with the YJ-62 (270 nm) while the LUYANG III MOD DDGs and RENHAI cruisers carry theYJ-18. Several older classes of destroyers have been retrofitted with the supersonic YJ-12 ASCM. In April 2022, the PRC had reportedly developed a new type of ASBM, possibly designated the YJ-21, small enough to fit into a surface combatant's VLS cell and tested-fired from a RENHAI. The PRC may be developing a YJ-18 launcher using a standard commercial shipping container for a merchant vessel.

To counter enemy submarines, certain PLAN surface ships are equipped with the short-range, anti-submarine YU-7 torpedoes. Ships like the JIANGKAI II FFG are equipped with a torpedo-carrying missile with a range of 30 km, a significant ASW capacity enhancement, which can be fired from the LUYANG III DDGs and RENHAI CGs. For protection against air threats, PLAN ships are equipped with the medium-range HHQ-16 (40 km) SAM or the longer-range HHQ-9 (100 km) VLS SAM, the latest version of which has an extended range of up to 150 km.

In the "Deep Sea" domain, the PLAN would use submarines—including conventional and nuclear-armed—to achieve deterrence while being able to strike the enemy's surface and shore targets, strike and destroy enemy submarines, and destroy the enemy's maritime lines of communication. To this end, submarine-launched variants of the YJ-18 anti-ship missile are likely installed on the nuclear-powered SHANG SSN as well as the SONG and YUAN class submarines. The recently launched SHANG III SSGN will further enhance the PLAN's surface warfare capability by providing a stealthy, land-attack option if armed with LACMs.

The PLAN provides a sea-based strategic deterrent with its SSBNs. The JIN SSBN can carry up to 12 JL-2 SLBMs with a range of 3,900 nm. By the early 2030s, a newer, multiple-warhead SLBM with a range of 5,400 nm could be developed for the next generation Type 096 SSBN.

Air Operations. The PLAAF's strategic air force concept will continue to take shape as the service fields new systems, including SAMs and UAVs, and develops upgraded variants of key platforms, such as the J-20 fighter, Y-20 transport aircraft, and possibly the H-20 bomber. An emphasis on coordinated offensive and defensive operations implies a shifting PLAAF mindset from its traditional defensive air mission to offensive operations conducted by a mix of manned and unmanned systems.

Hypersonic Weapons. The PRC's deployment of the DF-17 HGV-armed MRBM will continue to transform the PLA's missile force. The system, which was fielded in 2020, may replace some older SRBM units and be used to strike foreign military bases and fleets in the Western Pacific. The DF-27 may have an HGV payload option in addition to conventional land-attack, conventional antiship, and nuclear payloads. The PRC probably is developing additional advanced nuclear delivery systems, such as a strategic HGV and a FOB system.

JOINT CAPABILITIES FOR POWER PROJECTION

Key Takeaways

- The PLA continues to increase its military capabilities to achieve the PRC's regional and global security objectives beyond its immediate periphery.
- The PLA has emphasized primarily power projection capabilities in the maritime domain while its joint operational capabilities beyond the FIC remain limited.
- Improvements of PLA air and naval systems are enabling PLA forces to operate further from the PRC for longer periods.
- PLA ground, naval, air, and rocket forces are increasingly capable of projecting power at greater distances from the PRC. However, the PLA has demonstrated limited joint operational capabilities beyond the FIC. Instead, overseas activities are mostly conducted by single services and do not involve combat.

Beijing recognizes the importance of increasing military capabilities to achieve global security objectives and has encouraged the PLA to increase its operations beyond the Indo-Pacific. The PRC's 2015 and 2019 defense white papers claim that Beijing is primarily interested in developing these capabilities to protect PRC maritime rights and commercial interests. As the PRC's economic interests expand in areas like Africa, Central Asia, and the Middle East, the PLA will likely increase its focus on expanding power projection operations globally.

Naval Power Projection

The PLAN's experience in extended range operations is primarily derived from naval task group deployments and its ongoing counterpiracy mission in the Gulf of Aden, HA/DR operations, or intelligence collection missions. The PLA deploys surface task groups to southwest Pacific areas to gain far seas experience. In 2023, the PLAN conducted a robust level of global engagements, including port calls of various mission types: international exercises, exhibitions, training, and multiple humanitarian missions.

In 2023, the PLAN increased distant sea training in the eastern Indian and western Pacific oceans. In April 2023, the PLA's second aircraft carrier, *Shandong*, held its first far seas deployment outside of the FIC, followed by two more deployments in September and November that broke aircraft sortie rate records. The PLAN conducted its first far seas deployments with its newly certified YUSHEN class LHA. The PLAN deployed multiple task groups, including aircraft carriers, on far seas deployments near Guam and operated regularly near and to the East of Taiwan.

The PLAN has operated in the Gulf of Aden since 2008, deploying three–four vessels on average and 700 personnel for 4-month deployments. As of January 2024, the PLA has deployed over 150 vessels and more than 35,000 personnel across 45 escort missions. In April 2023, the PLA NETF conducted an emergency evacuation mission of PRC personnel in Sudan amidst a deteriorating security situation. The PRC ships evacuated 940 PRC nationals and 231 foreign nationals. The NETF diverted to conduct search and rescue operations in the Indian Ocean on its transit to the Gulf of Aden.

Throughout 2023, the PLAN participated in 10 multilateral naval exercises in various countries, including Indonesia, Cambodia, Russia, Pakistan, Iran, Tanzania, Singapore, Thailand, and South Africa. These exercises included the International Fleet Reviews, at-sea drills, and a Russia-PRC joint naval patrol. In June 2023, PLAN Dadu-class training ship, *Qi Ji Guang*, completed a 40-day transit to Southeast Asia with port calls in Vietnam, Thailand, Brunei, and the Philippines. This was the first international training operation for the ship since 2019. In September, the same training ship conducted a second 50-day training operation, visiting Indonesia, Papua New Guinea, and Fiji.

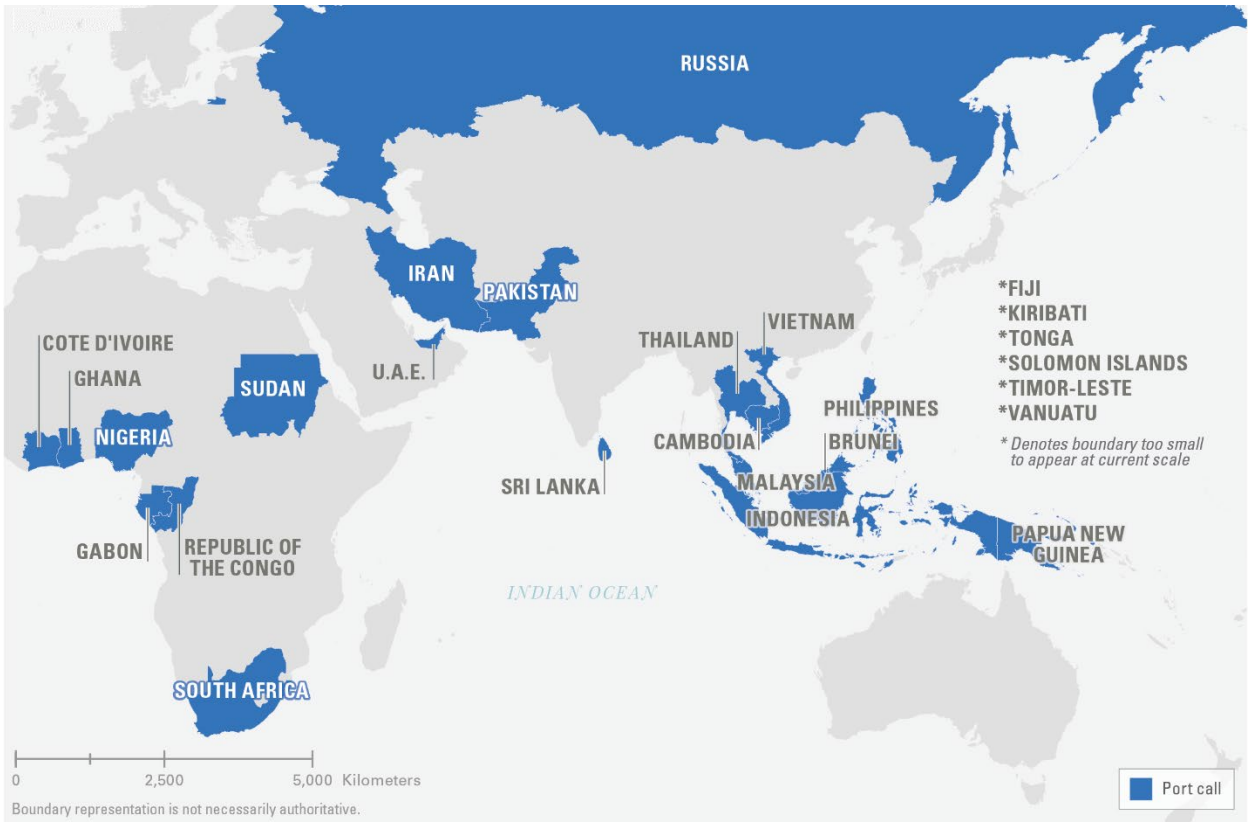
New ships enable the PLAN to gradually extend its operational reach beyond East Asia. In 2023, the PLAN certified its eighth RENHAI class guided-missile cruiser, which is equipped with radar, sensors, and communication systems integrated into its mast that gives the warship increased situational awareness, plus a 112-cell missile VLS hosting a combination of land attack, anti-ship, anti-air, and anti-submarine missiles. The PLAN started launch tests for the electromagnetic catapults on its third aircraft carrier, *Fujian*. When combat certified, the carrier will be capable of launching various specialized fixed-wing aircraft for early warning, EW, or ASW missions, increasing the PLAN's power projection capability.

The PRC is using its newest and most capable ship classes—the RENHAI class cruiser, LUYANG III, and LUYANG III MOD class guided-missile destroyer—as carrier escorts for long-range/extra-regional operations. The RENHAI class cruiser, with over 10,000 tons displacement and long-range ASCMs and SAMs, will likely be equipped with a planned naval variant of the Z-20 helicopter. The PLAN is engaged in series production of the RENHAI CG with at least eight units in service. The PLAN currently operates eight YUZHAO class LPDs and launched its fourth YUSHEN class LHA in December 2023. The PLAN's expanding fleet of large modern amphibious warships will enable it to conduct a wide range of expeditionary operations to protect the PRC's interests or in support of international assistance operations.

The PLAN is expanding its logistical capabilities to support long-distance operations. The PLAN has a sizable force of highly capable logistical replenishment ships to support long-duration deployments.

The PLANMC continues to make strides toward becoming a multidimensional expeditionary force capable of conducting operations beyond the FIC to protect the PRC's growing overseas interests. The PLANMC maintains a presence at the PRC's first overseas military support facility in Djibouti, which the PRC refers to as its "PLA support base in Djibouti," extending the PRC's military reach and strategic influence in Africa and the Middle East. The PLANMC's presence in Djibouti seeks to enable a military response to contingencies affecting the PRC's investments and infrastructure in the region.

PLA PORT CALLS 2024



Other Capabilities Beneficial to Power Projection

Aviation. PLA aviation forces are fielding advanced platforms capable of supporting future long-distance operations as their mission sets evolve from defending PRC territorial space to launching offensive operations at distances beyond the FIC. In 2023, the PLA transferred the majority of PLAN land-based fighter and bomber aircraft, air defense, and airfield units to the PLAAF to refocus PLAN efforts on developing a carrier-based aviation force. Meanwhile, the PLAAF has received repeated calls from its leadership to become a truly "strategic" air force, able to project power at long distances to advance and defend the PRC's global interests.

The PLA's indigenously developed Y-20A heavy-lift transport can perform long-distance missions with an estimated range of up to 2,400 nm. As of March 2024, the PLA reportedly operates 51 Y-20As. During the height of COVID-19, the PLA conducted numerous COVID-19 aid delivery missions and other disaster relief missions with its heavy-lift aircraft across Southeast Asia, the Middle East, Africa, and the South Pacific. In 2023, the PLAAF returned to conducting only aid relief missions in its immediate periphery, in areas like Nepal and Afghanistan, despite its inventory of strategic-lift aircraft expanding in recent years.

A tanker variant of the Y-20, the Y-20U, significantly expands the PRC's ability to conduct long-range offensive air operations. As of March 2024, the PLA has 16 Y-20Us. In January 2024, a Y-20U refueled seven J-10 fighters enroute to the World Defense Show in Saudi Arabia, the first published instance of a Y-20U international deployment. In addition, the PLA's Y-20U repeatedly

supported over-water long-range distance operations, crossing into Taiwan-declared ADIZ numerous times, and enabling the expansion of air refuellable fighters, bombers, and SMA aircraft into the Philippine Sea.

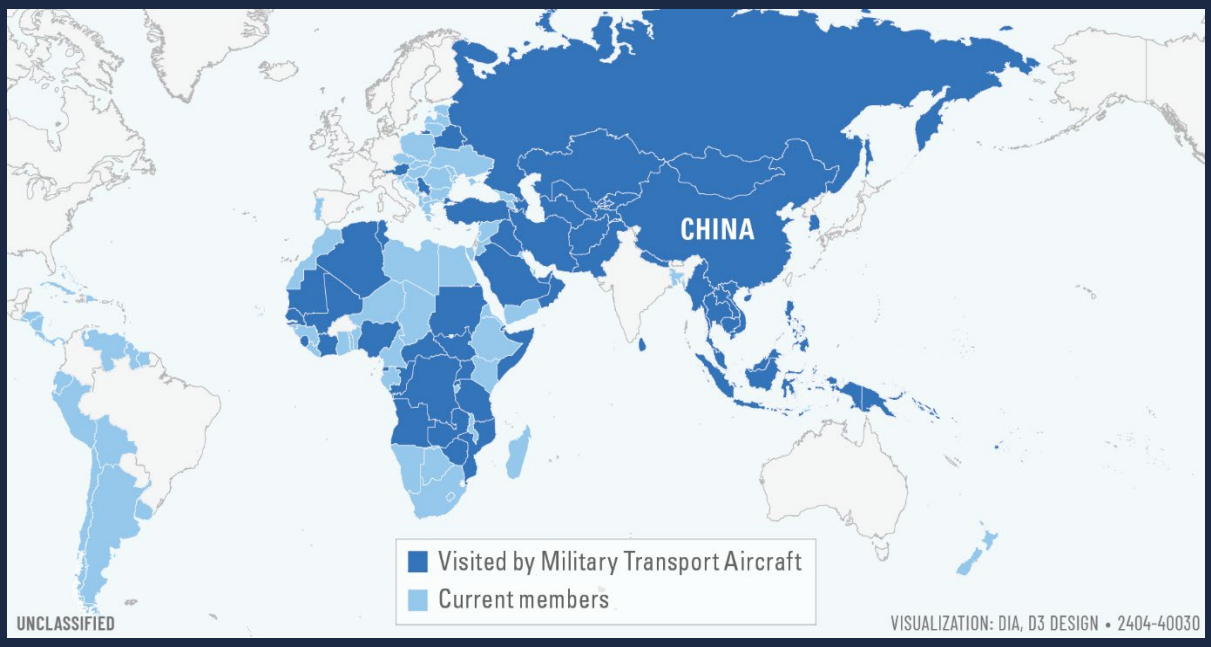
The PRC is developing a new generation of long-range bombers, likely named the H-20. The H-20, which may debut sometime in the next decade, will have a range of more than 10,000 km, enabling the PLAAF to cover the Second Island Chain and into the western region of the Pacific. The H-20 bomber's range could be extended to cover the globe with aerial refueling. It is expected to employ conventional and nuclear weaponry and feature a stealthy design.

The PLAA aviation and air assault units are enabling highly-mobile, modular ground task force capable of limited expeditionary operations. Three Z-8 transport aircraft battalions could airdrop a combat battalion in one lift. The Z-20 is expected to fill a variety of missions, including special force insertion and shipborne ASW.

PRC's outposts in the SCS extend the operating reach of PLA aviation forces. In 2023, PRC media released videos of J-11 fighters operating from Woody Island carrying out surveillance and response missions.

PLA TRANSPORT FLIGHTS TO BELT AND ROAD INITIATIVE COUNTRIES FROM 2020 TO 2024

This graphic depicts PLA transport flights into BRI countries from 2020 to 2024, demonstrating its willingness to use military aircraft for global transport operations. Numerous military flights were used for HA/DR efforts. Beijing probably leverages its HA/DR support as a component of its broader campaign to improve bilateral relationships and strengthen its responsible global power narrative. We lack reporting that these flights represent PLA involvement or interest in BRI infrastructure development projects.



Space and Cyber. The former SSF's strategic cyberspace, technical reconnaissance, and psychological warfare capabilities and missions are not bound by geographic constraints and can be used independently or to enable and support PLA global power projection operations. The former SSF's information support role involves centralizing technical intelligence collection and management, which provides strategic intelligence support to the theater commands, enables power projection, and aids joint operations. The mission of the CSF, formerly referred to as the NSD, across the cyber and information domains and the electromagnetic spectrum probably provides key capabilities to support PLA power projection globally, including improving PRC access to the cyber domain in peacetime and contesting it in wartime.

The PLA integrates offensive and defensive cyber operations into its joint military exercises, allowing its cyber personnel to gain operational experience while testing new capabilities.

The PRC considers space-based capabilities essential in enabling joint operations and force projection capability by providing communications, intelligence, surveillance, early warning, and navigation during peacetime and war. The PLA probably plans to conduct ASAT and other space-based kinetic and non-kinetic operations during a conflict and will refine the specific operational details regarding ASAT or counterspace functions during wartime as new capabilities are fielded. Counterspace actions are intended to deny or disrupt the adversary's use of space that hinders military operations that the PRC deems counter to its national security interests.

The PLA SESS operates spacecraft tracking ships, Yuanwang, which are equipped with advanced electronic equipment, sensors, and antennas that can assist in tracking satellite, rocket, and ICBM launches. The Yuanwangs have increased their operational tempo and range in recent years and, in 2023, set a record for days at sea.

ADVANCEMENTS TOWARDS AN INFORMATIZED AND INTELLIGENTIZED MILITARY

Key Takeaways

- The PLA considers IO as a means of achieving information superiority early in a conflict, which it considers a critical requirement for the success of any military campaign, and continues to expand the scope and frequency of IO in military exercises.
- The PRC presents a significant, persistent cyber-enabled espionage and attack threat to an adversary's military and critical infrastructure systems.
- The PLA is pursuing next-generation combat capabilities based on its vision of future conflict, which it calls "intelligentized warfare," defined by the expanded use of AI, quantum computing, big data, and other advanced technologies at every level of warfare.
- The PRC is advancing its cyberspace attack capabilities and can launch cyberspace attacks—such as disruption of a natural gas pipeline for days to weeks—in the United States.

President Xi has called for the PLA to create a highly informatized force capable of dominating all networks and expanding the country's security and development interests. The PLA describes informatized warfare as the use of information technology to create an operational system-of-systems, enabling the PLA to acquire, transmit, process, and use information during a conflict to conduct integrated joint military operations across the ground, maritime, air, space, cyberspace, and electromagnetic spectrum domains. The PLA is accelerating the incorporation of command information systems, providing forces and commanders with enhanced situational awareness and decision support to more effectively carry out joint missions and tasks to win informatized local wars. The PLA continues to expand the scope and regularity of military training exercises that simulate informatized operations and likely views offensive and defensive cyberspace operations as a means to achieve information dominance early in a crisis or conflict.

C4ISR Modernization and AI Integration. The PRC continues to prioritize C4I modernization as a response to trends in modern warfare that emphasize the importance of rapid information collection, processing, and sharing and accelerated decision-making. The PLA is continuing modernization and reform efforts, technologically and organizationally, to command complex, joint operations effectively across all warfare domains and potentially in multiple theaters.

The PLA sees networked, technologically advanced C4ISR systems as critical to enabling reliable, secure communications and real-time information sharing to enhance commanders' battlefield situational awareness at fixed and mobile command posts, thereby enabling rapid, effective, multi-echelon decision-making. These systems are designed to distribute real-time data, including intelligence, battlefield information, logistical information, and weather reports—via redundant, resilient communications networks—to increase the speed and efficiency of operational C2 in a contested environment and enable the PLA to achieve a truly joint warfighting capability. PLA field commanders view near-real-time ISR and situational data, as well as redundant and reliable communications, as essential to streamlining decision-making processes and shortening response timelines. Beijing recognizes advantages of near-space ISR capabilities and probably will seek to leverage near-space platforms to augment space-based satellite capabilities or provide redundancy during crisis. The PRC is fielding the Integrated Command Platform to units at multiple echelons across the force to enable lateral and cross-service communications and intelligence sharing required for joint operations.

As the PLA continues to focus on improving its ability to fight and win informatized wars, future information systems likely will implement emerging technologies, such as automatization, big data, the internet of things, AI, and cloud computing to improve process efficiencies. The PLA has already begun this process by embracing big data analytics that fuse a variety of data to improve automation and create a comprehensive, real-time picture for warfighters. PLA aspirations to integrate AI into its future C4ISR capabilities, processes, and systems revolve around several key areas, including reconnaissance data processing, automated target recognition, and C2 decision-making support. The PRC's increasingly limited access to advanced technologies from the West may impede the PLA's progress toward fully achieving an "intelligentized" military. However, the PRC is pursuing domestic production of critical technologies to reduce reliance on foreign sources.

Precision Guided Weapons and ISR. The PRC views its ability to acquire timely, high-fidelity information as critical to rapidly and effectively C2 multi-domain joint operations and precision

strikes. The PLA's information support system for precision strikes depends heavily on former SSF assets to detect, identify, target, and assess battlefield damage. The PRC emphasizes the importance of space-based surveillance capabilities for supporting precision strikes and continued to develop its fleet of military reconnaissance satellites to support monitoring, tracking, and targeting of U.S. and allied forces. The PRC views its robust C4ISR architecture as essential for achieving information superiority during conflict to maximize the efficiency and effect of long-range joint fires, thereby enabling informatized and eventually intelligentized warfare.

Electronic Warfare. The PLA considers EW to be an integral component of modern warfare and seeks to achieve information dominance in a conflict through use of EW, as well as cyberspace, to protect its own information networks and deny the enemy the use of the electromagnetic spectrum. The PRC's EW strategy emphasizes suppressing, degrading, disrupting, or deceiving enemy electronic equipment throughout the continuum of a conflict. The PLA will likely use EW prior to a conflict to warn and deter adversary offensive action. Potential EW targets include adversary systems operating in radio, radar, microwave, infrared, and optical frequency ranges as well as adversary computer and information systems. PLA EW units routinely train to conduct jamming and anti-jamming operations against multiple communication and radar systems and GPS receivers during force-on-force exercises. These exercises test operational units' understanding of EW weapons, equipment, and procedures and enable operators to improve confidence in their ability to operate effectively in a complex electromagnetic environment. The PLA reportedly tests and validates advances in EW weapons' R&D during these exercises.

Cyber. The PLA views cyber operations as one of three primary means of pursuing information dominance in conflict—alongside electronic and psychological warfare—and emphasizes the use of such IO operations to counter a stronger foe. The PRC has publicly identified cyberspace as a critical domain for national security and declared its intent to expedite the development of its cyber forces.

The PRC poses a sophisticated, persistent cyber-enabled espionage and attack threat to military and critical infrastructure systems and presents a growing influence threat. The PRC seeks to create disruptive and destructive effects—from denial-of-service attacks to physical disruptions of critical infrastructure—to shape decision-making and disrupt military operations beginning in the initial stages and throughout a conflict. Malicious cyber activity tracked publicly as Volt Typhoon—which has been pursuing access to U.S. critical infrastructure networks—likely supports these goals. The PRC likely can launch cyberspace attacks against some U.S. critical infrastructure networks and create effects, such as disruption of a natural gas pipeline for days to weeks.

The PLA sees coordinated employment of space, cyberspace, and EW as strategic weapons to "paralyze the enemy's operational system of systems" and "sabotage the enemy's war command system of systems" early in a conflict. The PLA contends that other countries have effectively used cyberspace warfare and other IO in recent conflicts and argues for attacks against C2 and logistics networks to affect an adversary's ability to make decisions and act in the early stages of conflict. The PLA considers cyberspace capabilities to be a critical component in its overall integrated strategic deterrence posture, alongside space and nuclear deterrence. The PLA discusses using warning or demonstration strikes—strikes against select military, political, and economic targets with clear awing effects—as part of deterrence. Accordingly, the PLA probably seeks to use its

cyber-reconnaissance capabilities to collect data for intelligence and cyberspace attack purposes; to constrain an adversary's actions by targeting network-based logistics, C2, communications, commercial activities, and civilian and defense critical infrastructure; and to serve as a force-multiplier when coupled with kinetic attacks during armed conflict.

PLA publications emphasize the importance of cyber defense for the PRC's critical infrastructure and military system-of-systems against adversary reconnaissance and attacks. The PLA likely views cyber defense as including preventative measures as well as offensive actions to deter or disrupt adversary cyberspace activity.

CYBERSPACE ACTIVITIES DIRECTED AGAINST THE U.S. DEPARTMENT OF DEFENSE (DOD)

PRC state-sponsored cyber actors continued to target defense organizations throughout 2023, likely for intelligence collection and cyberattack prepositioning. These cyber operations exploit known and unknown vulnerabilities as well as living-off-the-land techniques to gain and expand access to target networks while evading detection. PRC cyber actors use this access to steal sensitive information for economic and military advantage and likely to develop cyberattack capabilities against key support systems. The targeted information can benefit the PRC's defense high-technology industries, support the PRC's military modernization, provide the PRC's leadership with insights into U.S. plans and intentions, and enable diplomatic negotiations. Moreover, targeted information could enable the PRC's cyberspace forces to build an operational picture of U.S. defense networks, military disposition, logistics, and related military capabilities that could be exploited prior to or during a crisis. The access and skillset required for these intrusions are similar to those necessary to conduct cyberspace operations in an attempt to deter, delay, disrupt, and degrade DoD operations prior to or during a conflict. Taken together, these cyber-enabled campaigns directly or indirectly impact the United States' ability to project or defend against military action.

Space and Counterspace Capabilities

The PRC's goal is to become a world space power. Its rapidly growing space industry—second only to the United States in the number of operational satellites—is a source of national pride and part of Xi's "China Dream" to establish a powerful and prosperous PRC. The space industry, managed by the PLA, supports civilian and military interests, including strengthening its S&T sector, growing international relationships, and modernizing the military. The PRC seeks to rapidly achieve these goals through advances in the R&D of space systems and space-related technology.

Space Capabilities. The PRC officially advocates for the peaceful use of space and is pursuing agreements in the United Nations on the "non-weaponization" of space. The PRC continues to improve its counterspace weapons capabilities and has enacted military reforms to better integrate cyberspace, space, and EW into joint military operations. The PRC's space strategy is expected to

evolve over time, keeping pace with the application of new space technology. These changes probably will be reflected in published national space strategy documents, through space policy actions, and in programs enacted by political and military leadership. In September 2021, Xi stated that "space is an important strategic asset for the country that must be well managed and utilized and, more importantly, protected," and called for strengthened space traffic management and international cooperation on security issues to improve effectiveness in managing crises in space.

The PLA views space superiority, the ability to control the space-enabled information sphere and to deny adversaries their own space-based information gathering and communication capabilities, as a critical component to conduct modern "informatized warfare." The PRC's first public mention of space and counterspace capabilities came as early as 1971, largely from academics reviewing foreign publications on ASAT technologies. However, PRC S&T efforts on space began to accelerate in the 1980s, most likely as a result of the U.S. space-focused Strategic Defense Initiative to defend against the former Soviet Union's nuclear weapons. Subsequently, after observing the U.S. military's performance during the 1991 Gulf War, Kosovo, Afghanistan, and the second Iraq War, the PLA embarked on an effort to modernize weapon systems across all domains, including space, and update its doctrine to focus on using and countering adversary information-enabled warfare.

The PRC's perceptions of the importance of space-enabled operations to the United States and its allies has shaped integral components of PLA military planning and campaigns. Space is a critical enabler of beyond-LOS operations for deployed PRC forces. The PLA sees counterspace operations as a means to deter and counter a U.S. intervention during a regional military conflict. The PRC has claimed that "destroying or capturing satellites and other sensors" would make it difficult for the U.S. and allied militaries to use precision-guided weapons. Moreover, PRC defense academics suggest that reconnaissance, communication, navigation, and early warning satellites could be among the targets of attacks designed to "blind and deafen the enemy."

The PRC's space enterprise continues to mature rapidly and Beijing has devoted significant economic and political resources to growing all aspects of its space program, from military space applications to civil applications, such as profit-generating launches, scientific endeavors, and space exploration. The PRC's space enterprise included the former SSF and encompasses other military, government, and civilian organizations, including SOEs, academic institutions, and commercial entities. The PLA has historically managed the PRC's space program and the ASF is responsible for nearly all PLA space operations. The PRC continues to strengthen its military space capabilities despite its public stance against the weaponization of space. The PLA continues to invest in improving its capabilities in space-based ISR, satellite communication, satellite navigation, and meteorology as well as human spaceflight and robotic space exploration. The PRC has built an expansive ground support infrastructure to support its growing on-orbit fleet and related functions, including spacecraft and SLV manufacture, launch, C2, and data downlink. The PRC continues to develop counterspace capabilities—including direct ascent, co-orbital, EW, and directed-energy capabilities—that can contest or deny an adversary's access to and operations in the space domain during a crisis or conflict.

The PRC has devoted considerable economic and technological resources to growing all aspects of its space industry, improving military space applications, developing human spaceflight, and conducting lunar and Martian exploration missions. CASC and CNSA, two PRC civil space

agencies, have planned 70 launches in 2024, placing more than 290 satellites, cargo vessels, and crewed spacecraft in orbit. While the PRC's space budget is significantly less than NASA's, its estimated budget was $14.14 billion in 2023. In 2022, the PRC conducted over 60 successful space launches, a three-fold increase compared to 5 years ago. One of these launches was a technology testing mission of a reusable space plane, which was in orbit from August 2022 until May 2023. These 2022 launches carried over 180 satellites into orbit, which is a five-fold increase in satellites deployed compared to 5 years ago. Last year, the PRC completed construction of the three-module PRC space station. Furthermore, the PRC has launched a robotic lander and rover to the far side of the Moon; a lander and sample return mission to the Moon; and an orbiter, lander, and rover in one mission to Mars. The PRC has launched multiple ASAT missiles, which can destroy satellites, and developed mobile jammers to deny SATCOM and GPS.

The PLA continues to acquire and develop a range of counterspace capabilities and related technologies, including kinetic-kill missiles, ground-based lasers, and orbiting space robots as well as expanding space surveillance capabilities, which can monitor objects in space in their field of view and enable counterspace actions. In concert with its marked improvements in satellite navigation, launch capabilities, and space object surveillance and identification, the PRC is developing EW capabilities, such as satellite jammers, offensive cyberspace capabilities, and directed-energy weapons. Moreover, the PRC has demonstrated sophisticated, potentially damaging, on-orbit behavior with space-based technologies. The PRC has an operational ASAT missile intended to target LEO satellites. The PRC probably intends to pursue additional ASAT weapons capable of destroying satellites up to geosynchronous Earth orbit. The PRC is employing more sophisticated satellite operations and is probably testing dual-use technologies in space that could be applied to counterspace missions.

The PRC owns and operates more than 60 communications satellites, at least four of which are dedicated to military use. The PRC produces its military-dedicated satellites domestically. Its civilian communications satellites incorporate off-the-shelf commercially manufactured components. The PRC is fielding advanced communications satellites capable of transmitting large amounts of data. Existing and future data relay satellites and other beyond-LOS communications systems could convey critical targeting data to PRC military operation centers.

The PRC is progressing in its ambitious plans to propel itself to the forefront of the global SATCOM market. The PRC is continuing to test next-generation capabilities like its Quantum Experimentation at Space Scale space-based, quantum-enabled communications satellite, which could support fielding of highly secure communications systems. In 2016, the PRC launched the world's first quantum communications satellite (Micius) into LEO. In July 2022, the PRC launched an additional experimental quantum satellite. Testing satellite-based quantum entanglement represents a major milestone in building a practical, global, ultra-secure quantum network but the widespread deployment and adoption of this technology still faces hurdles.

The PRC intends to provide SATCOM support to users worldwide and plans to develop at least seven new SATCOM constellations in LEO, most notably one from SOE China SatNet. These constellations are still in the early stages of development and may begin to launch in the next year.

The PRC's satellite navigation system, BeiDou, is an independently constructed, developed, and exclusively PRC-operated PNT service. It reached initial operating capability in 2018 and was finalized with its last launch in 2020. The PRC's priorities for BeiDou are to support national

security and economic and social development by adopting PRC PNT into precise agriculture, monitoring of vehicles and ships, and aiding with civilian-focused services across more than 100 countries in Africa, Asia, and Europe. BeiDou provides all-time, all-weather, and high-accuracy PNT services to users domestically, in the Asia-Pacific region, and globally, consisting of 49 operational satellites. The PRC's military uses BeiDou's high-accuracy PNT services to enable force movements and precision guided munitions delivery.

BeiDou has a worldwide positional accuracy standard of 10 meters; accuracy in the Asia-Pacific region is within 5 meters. In addition to providing PNT, the BeiDou constellation offers unique capabilities, including text messaging and user tracking through its Regional Short Message Communication service to enable mass communications among BeiDou users. The system provides additional military C2 capabilities for the PLA.

The PRC intends to use its BeiDou constellation to offer additional services and incentives to countries taking part in its BRI, emphasizing building strong economic ties to other countries to align partner nations with the PRC's interests. In 2021, the PRC predicted BeiDou products and services will be worth $156 billion by 2025 and be exported to more than 100 million users in 120 countries.

The PRC has a robust network of space surveillance sensors capable of searching, tracking, and characterizing satellites in all Earth orbits. This network includes a variety of ground-based telescopes and radars as well as space-based sensors that enable the PRC to support its missions, including intelligence collection, counterspace targeting, ballistic missile early warning, spaceflight safety, satellite anomaly resolution, and space debris monitoring.

Space Exploration. Following uncrewed missions that began in 1999, the PRC became the third country to achieve independent human spaceflight when it orbited the crewed *Shenzhou-5* spacecraft in 2003. In 2011, the PRC launched its first space station, *Tiangong-1*, and in 2016, it launched its second space station, *Tiangong-2*. In 2020, the PRC conducted its first orbital test of the New-Generation crewed spaceship, which is expected to replace the Shenzhou series of crewed spacecraft. In 2022, the PRC launched the Mengtian Chinese Space Station laboratory module into orbit, completing the three-module PRC space station.

The PRC has taken on a greater role in deep space exploration and space science and has made notable accomplishments during the past several years. The PRC has demonstrated its interest in working with Russia and the European Space Agency (ESA) to conduct deep-space exploration. The PRC was the third country to place a robotic rover on the Moon and was the first to land a rover on the lunar far side in 2019, which is communicating through the Queqiao relay satellite that the PRC launched the year before to a stable orbit around an Earth-Moon Lagrange point. In May 2021, the PRC landed the Zhurong rover on Mars, the first PRC rover to operate on Mars. This rover has provided the PRC with valuable scientific data of the Martian surface and underground.

Space Launch. The PRC is improving its space launch capabilities to ensure it has an independent, reliable means to access space and compete in the international space launch market. The PRC continues to improve manufacturing efficiencies and launch capabilities overall, supporting continued human spaceflight and deep-space exploration missions—including to the Moon and Mars. New modular SLVs that enable the PRC to tailor an SLV to the specific configuration

required for each customer are beginning to go into operation, leading to increased launch vehicle reliability and overall cost savings for launch campaigns. The PRC is in the early stages of developing a super heavy-lift SLV similar to the U.S. Saturn V or the newer U.S. Space Launch System to support proposed crewed lunar and Mars exploration missions.

In addition to land-based launches, in 2019, the PRC demonstrated the ability to launch a Long March-11 (LM-11) SLV from a sea-based platform. Since 2021, the PRC has been expanding its sea launch infrastructure near Haiyang to increase the frequency of sea launch missions. This capability, if staged correctly, would enable the PRC to launch nearer to the equator than its land-based launch sites, better enable launch to a wide range of orbital inclinations, increase the rocket's carrying capacity, and potentially lower launch costs.

The PRC has developed quick-response SLVs to increase its attractiveness as a commercial small satellite launch provider and rapidly reconstitute LEO space capabilities, which could support PRC military operations during a conflict or civilian response to disasters. Compared with medium- and heavy-lift SLVs, these quick-response SLVs can expedite launch campaigns because they are transportable via road or rail and can be stored launch-ready with solid fuel for longer periods than liquid-fueled SLVs. Because their size is limited, quick-response SLVs, such as the Kuaizhou-1 (KZ-1), LM-6, and LM-11 can launch relatively small payloads of only up to approximately 2 metric tons into LEO.

The expansion of non-state-owned PRC launch vehicle and satellite operation companies in the PRC's domestic market since 2015 suggests that the PRC is advancing MCF efforts. These efforts are intended to enhance R&D and spur technological innovation. MCF blurs the lines between these military and civilian entities and obfuscates the end users of acquired foreign technology and expertise.

Counterspace. The PLA considers EW capabilities as critical assets for modern warfare, and its doctrine emphasizes using EW to suppress or deceive enemy equipment. The PLA exercises routinely incorporate jamming and anti-jamming techniques that probably are intended to deny multiple types of space-based communications, radar systems, and GPS navigation support to military movement and precision-guided munitions employment. The PRC probably is developing jammers for targeting SAR, including aboard military reconnaissance platforms. Interfering with SAR satellites very likely protects terrestrial assets by denying imagery and targeting in any potential conflict involving the United States or its allies. In addition, the PRC probably is developing jammers to target SATCOM over a range of frequency bands, including military-protected extremely high-frequency communications.

In 2007, the PRC destroyed one of its defunct weather satellites more than 800 km above the Earth with an ASAT missile. This destructive test generated more than 3,000 pieces of trackable space debris, of which more than 2,700 remain in orbit. Most will continue orbiting the Earth for decades. The PLA's operational ground-based ASAT missile system is intended to target LEO satellites. The PRC's military units have continued training with ASAT missiles.

The PRC probably plans to pursue additional ASAT weapons that can destroy satellites up to GEO. In 2013, the PRC launched an object into space on a ballistic trajectory with a peak orbital radius above 30,000 km, near GEO altitudes. No new satellites were released from the object and the launch profile was inconsistent with traditional SLVs, ballistic missiles, or sounding rocket

launches for scientific research, suggesting a basic capability to use ASAT technology against satellites in GEO.

The PRC is developing other sophisticated space-based capabilities, such as satellite inspection and repair. At least some of these capabilities could function as a weapon. The PRC has launched multiple satellites for scientific experiments on space maintenance technologies and is conducting research on space debris cleanup. The Shijian-17 was the PRC's first satellite with a robotic arm, technology that could be used in a future system for grappling adversary satellites. In October 2021, the PRC launched another satellite with a robotic arm, the Shijian-21, into GEO. In January 2022, it moved a derelict BeiDou navigation satellite to a high graveyard orbit above GEO.

Since at least 2006, the PRC has investigated aerospace engineering aspects associated with space-based kinetic weapons—generally a class of weapon used to attack ground, sea, or air targets from orbit. Space-based kinetic weapons research included methods of reentry, separation of payload, delivery vehicles, and transfer orbits for targeting purposes. In July 2021, the PRC conducted the first fractional orbital launch of an ICBM with a HGV from China. This demonstrated the greatest distance flown (~40,000 km) and longest flight time (~100+ minutes) of any PRC land attack weapons system to date.

NUCLEAR CAPABILITIES

Key Takeaways

- Over the next decade, the PRC probably will continue to rapidly modernize, diversify, and expand its nuclear forces. The PLA seeks a larger and more diverse nuclear force, comprised of systems ranging from low-yield precision strike missiles to ICBMs with multi-megaton yields to provide it options at every rung of the escalation ladder.
- Beijing continued its rapid nuclear expansion. DoD estimates the PRC has surpassed 600 operational nuclear warheads in its stockpile as of 2024.
- DoD estimates that the PRC will have over 1,000 operational nuclear warheads by 2030, much of which will be deployed at higher readiness levels, and will continue growing its force to 2035 in line with its goal of ensuring PLA modernization is "basically complete" that year, an important milestone on the road to Xi's goal of a "world class" military by 2049.
- The PRC probably will use its new fast breeder reactors and reprocessing facilities to produce plutonium for its nuclear weapons program, despite publicly maintaining these technologies are intended for peaceful purposes.

The PRC probably continues to arm solid-propellant silo fields, which consist of 320 silos across its three new silo fields. The PLA is more than doubling the size of its DF-5 liquid-silo force, which probably will have about 50 silos by the end of the effort. The large growth of the PLA silo force suggests Beijing is making progress in establishing its "early warning counterstrike" posture to increase the survivability and responsiveness of these launch sites.

The PRC probably is developing advanced nuclear delivery systems, in part due to long-term concerns about United States missile defense capabilities. The PRC monitors U.S. and Russian nuclear weapons programs and probably has developmental efforts for additional PLA advanced nuclear capabilities if Beijing elects to progress these efforts through fielding.

The PLA's expanding nuclear force will enable it to target more U.S. cities, military facilities, and leadership sites than ever before in a potential a nuclear conflict. While PRC leaders have historically judged that being able to inflict even limited damage during a nuclear counterstrike was sufficient for deterrence—an "assured retaliation" capability—the PRC's force modernization suggests that it seeks to have the ability to inflict far greater levels of overwhelming damage to an adversary in a nuclear exchange as well as engage in multiple rounds of counterstrike, including through more discriminate forms of nuclear employment, such as with lower-yield weapons.

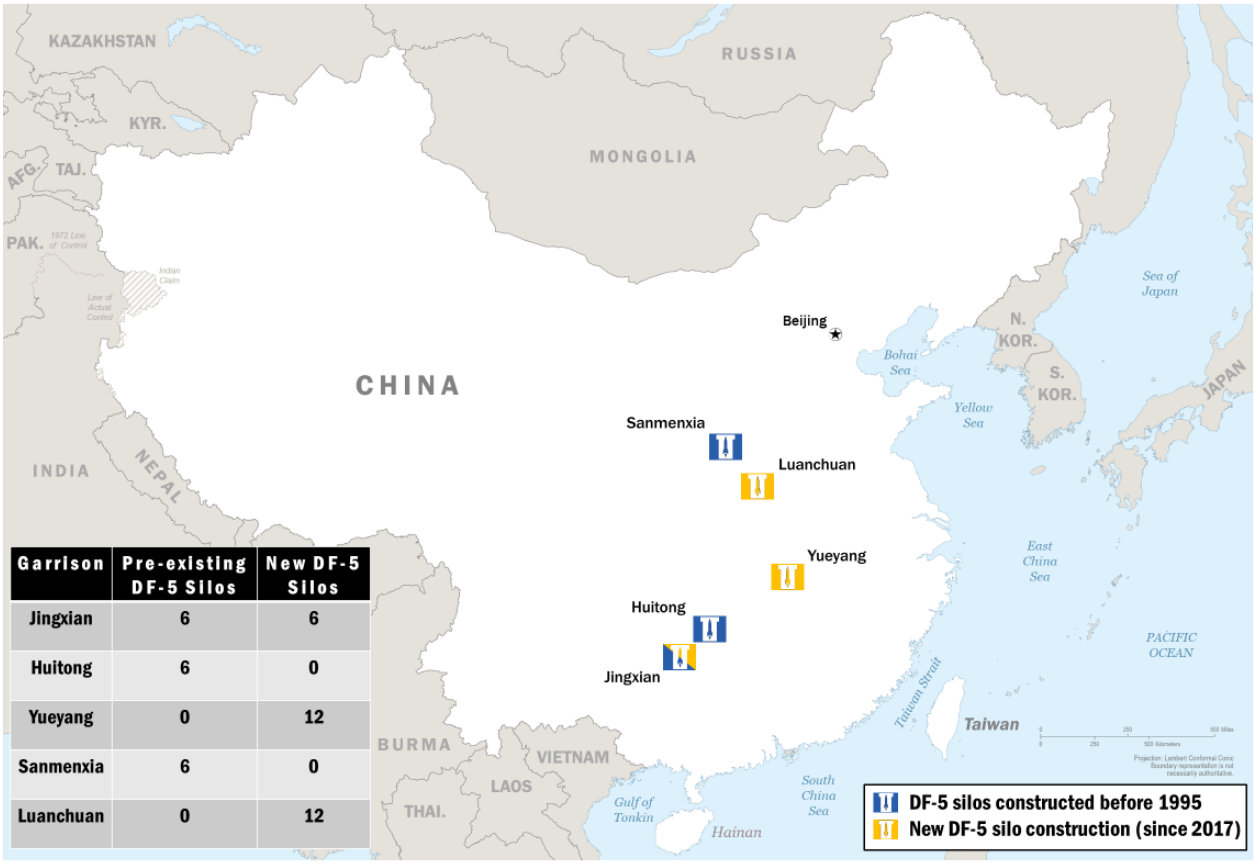
Strategy

The PRC's approach to using nuclear force is based on PLA "deterrence" of an enemy first strike and "counterstrike" when deterrence fails, threatening retaliation against an adversary's military capability, population, and economy. The PRC's nuclear weapons policy prioritizes maintaining a nuclear force able to survive a first strike and respond with sufficient strength to conduct multiple rounds of counterstrike, deterring an adversary with the threat of unacceptable damage to its military capability, population, and economy. The PLA probably selects its nuclear strike targets to achieve conflict de-escalation and return to a conventional conflict with a remaining force sufficient to deter its adversary. PLA planners would probably avoid a protracted series of nuclear exchanges against a superior adversary and state that the scale and intensity of retaliatory force needs to be carefully controlled.

The PRC's approach to nuclear force includes a declaratory no-first-use (NFU) policy, stating it will never use nuclear weapons first at any time under any circumstances, including unconditionally not using or threatening to use of nuclear weapons against any non-nuclear-weapon state or in nuclear-weapon-free zones. Despite publicizing this policy, the PRC's nuclear strategy probably includes consideration of a nuclear first strike in response to nonnuclear attacks that PRC leaders perceive as threatening the viability of the PRC's nuclear forces or C2, or that approximate the strategic effects of a nuclear strike. Beijing probably would consider nuclear first use if a conventional military defeat in Taiwan gravely threatened CCP regime survival.

The PRC's commingling of some of its conventional and nuclear missile forces during peacetime and ambiguities in its NFU conditions could complicate deterrence and escalation management during a conflict. If a comingled PRC missile launch is not readily identifiable as a conventional or nuclear missile, it may not be clear what the PRC launched until it detonates. Furthermore, potential adversary attacks against the PRC's conventional missile force-associated C2 centers could inadvertently degrade the PRC's nuclear C2 and generate nuclear use-or-lose—the pressure to use weapons before they are targeted. Once a conflict has begun, the PRC's dispersal of mobile missile systems to hide sites could further complicate the task of distinguishing between nuclear and conventional forces and, thus, increase the potential for inadvertent attacks on the nuclear forces. PRC leadership calculus for responding to conventional attacks on nuclear forces remains a key unknown.

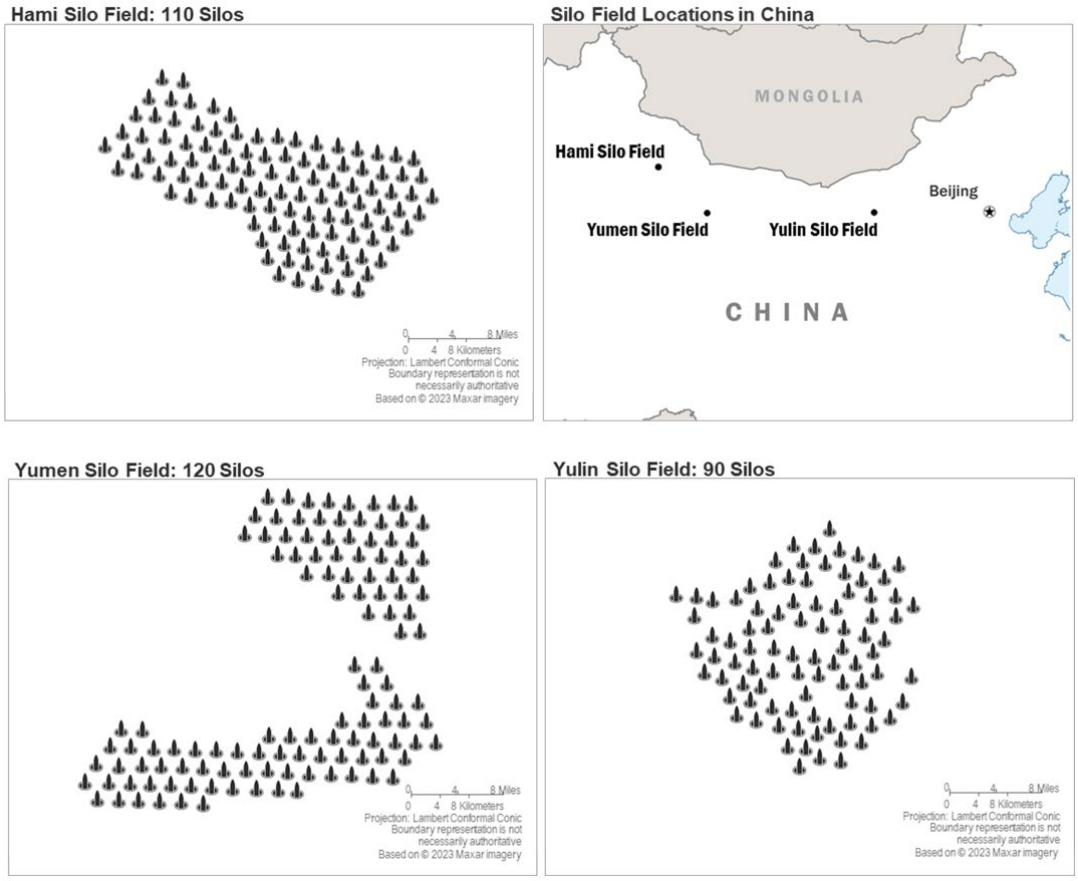
CHINA: PRE-EXISTING AND NEW DF-5 SILOS



Garrison	Pre-existing DF-5 Silos	New DF-5 Silos
Jingxian	6	6
Huitong	6	0
Yueyang	0	12
Sanmenxia	6	0
Luanchuan	0	12

Current Nuclear Force

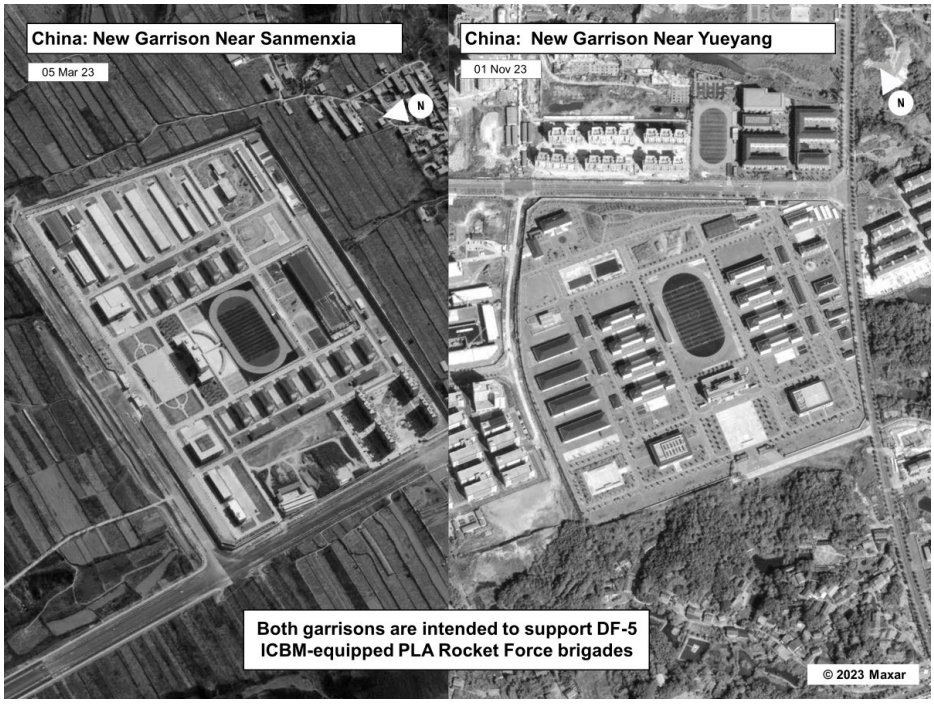
The PRC's land-based nuclear force primarily consists of ICBMs with different basing modes, complemented by theater-range road-mobile systems. The PRC has approximately 400 ICBMs in its arsenal, all of which can reach CONUS. **Silo-Based Systems.** The PRC's silo-based ICBMs consist of multiple CSS-4 (DF-5 class) liquid-propellant ICBMs and, more recently, a CSS-10 (DF-31class) solid-propellant ICBM, which the PRC probably began to load across its three new silo fields. The PRC is updating its capability to deliver multi-megaton warheads by fielding the new DF-5C silo-based, liquid-fueled ICBM. The PRC is building more silos for DF-5 class ICBMs and increasing the number of BDEs while increasing the number of launchers per BDE; however, there is no indication this project will approach the size or numbers of the solid-propellant missile silos. This includes construction of at least 30 new DF-5-class silos in central China, suggesting at least two BDEs likely will field the DF-5C. Additionally, the PRC has conducted extensive renovations of several facilities at units fielding legacy DF-5-class ICBMs, which may indicate these units are likely to field more modern DF-5-class missiles. The PLA probably is developing an upgrade to its existing MIRVed DF-5 liquid-fueled ICBMs. Further, silo-based or rail-mobile DF-41s may be deployed in the future.



Road-Mobile Systems. The PRC's road-mobile ICBMs consist of the solid-fueled CSS-10 (DF-31 class) and CSS-20 (DF-41) ICBMs. The CSS-20 has improved range and accuracy over legacy solid-fueled ICBMS and is armed with no more than three warheads per missile. The PRC is establishing additional nuclear units and increasing the number of launchers in mobile ICBM units. This strategic arsenal is complemented by road-mobile DF-26 IRBMs capable of ranging targets in the Indo-Pacific region.

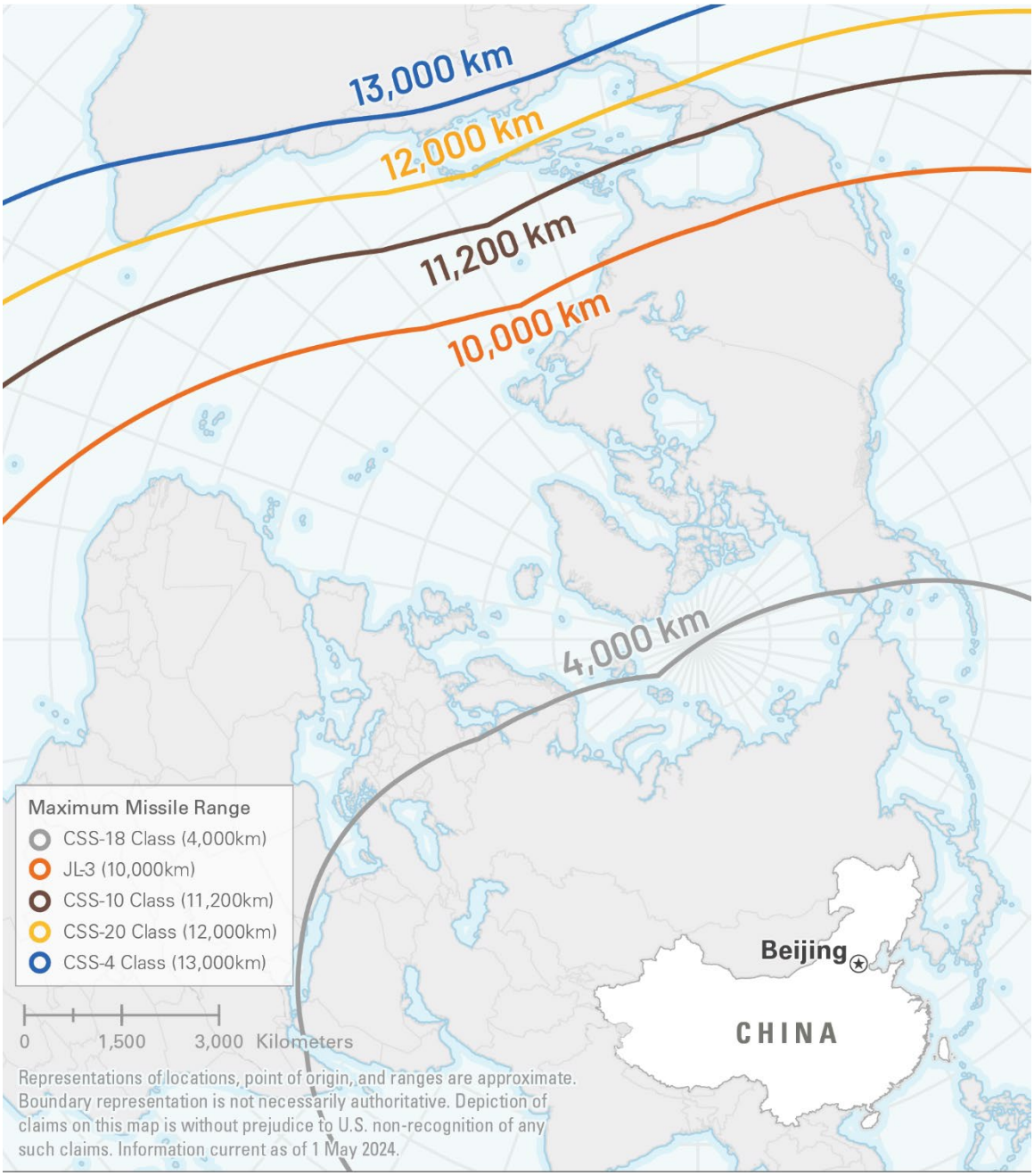
Sea-Based Systems. The PRC probably fielded the extended-range CSS-N-20 (JL-3) SLBM on the PRC's JIN class SSBN, giving the PRC the ability to target CONUS from littoral waters and enabling the PLAN to consider bastion operations to enhance the survivability of its sea-based deterrent. The SCS and Bohai Gulf probably are the PRC's preferred options for employing this concept. The PRC continued to construct additional JIN class SSBNs. It is unclear whether continued JIN class SSBN production is the result of delays in the development of the PRC's next-generation Type 096 SSBN or an effort to accelerate its sea-based nuclear capability as Xi has directed. The Type 096 SSBN probably is intended to field MIRVed SLBMs and probably will begin construction in the mid-2020s. Based on the 30-plus-year service life of the PRC's first-generation SSNs, the PRC will operate its JIN and Type 096 SSBN fleets concurrently. The PRC probably continued to conduct near-continuous at-sea deterrence patrols with its six operational JIN class SSBNs, which are equipped to carry up to 12 CSS-N-14 (JL-2) or CSS-N-20 (JL-3) SLBMs.

Air Systems. The PLAAF has operationally fielded the H-6N bomber, providing a platform for the air component of the PRC's nuclear triad. The H-6N, compared to other H-6 bombers, adds an air-to-air refueling probe as well as its recessed fuselage modifications that enable external carriage of a nuclear-capable ALBM. The ALBM carried by the H-6N appears to be armed with a maneuvering reentry vehicle, indicating the ALBM—along with the DF-26 IRBM—likely can conduct nuclear precision strikes against targets in the Indo-Pacific theater. The PRC probably is developing a strategic stealth bomber, according to PRC state media.





FIELD NUCLEAR BALLISTIC MISSILES



Readiness of the Nuclear Force

The PLARF uses a set of operational procedures to keep part of its force at heightened readiness during peacetime. PLARF BDEs conduct "combat readiness duty" and "high alert duty," which include assigning a missile battalion to be ready to rapidly launch. This readiness posture allows the PLARF to maintain a portion of its units on a heightened state of readiness while leaving the other portion in peacetime status with separated launchers, missiles, and warheads. To transition from peacetime to combat readiness, the PLA probably has an orderly, pre-planned series of "combat readiness level" steps that govern the increases in the readiness of its forces. This process

probably enables the PLA to transition its nuclear missile force from its peacetime status to full combat readiness to respond to possible contingencies.

A new generation of silo-based ICBMs are entering the force and probably will be operating under the PRC's developing "early warning counterstrike" (预警反击) posture (the PLA term for launch on warning [LOW]) this decade, enabling a rapid responsive nuclear strike. The rate of silo arming suggests the PLA is progressing in establishing its "early warning counterstrike" posture to increase the survivability and responsiveness of these systems. In September 2023, the PRC launched two CSS-10 Mod 3 ICBMs in quick succession from training silos into Western China. This launch probably validated the PLARF's ability to rapidly launch multiple missiles, a key part of an early warning counterstrike capability.

Nuclear Warhead Stockpile

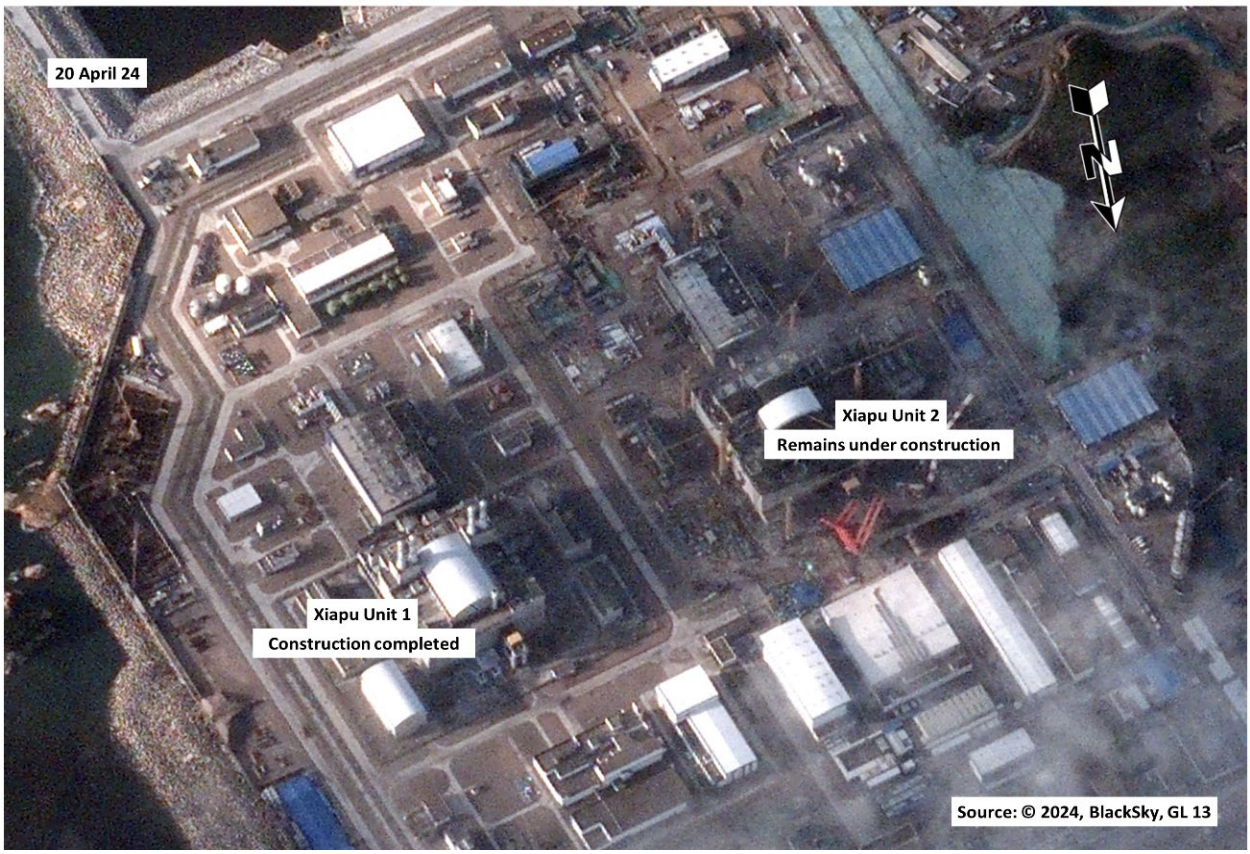
In 2020, DoD estimated the PRC's operational nuclear warhead stockpile was in the low-200s and was expected to at least double by 2030. However, Beijing has accelerated its nuclear expansion, and DoD estimates this stockpile has surpassed 600 operational nuclear warheads as of 2024, on track to exceed previous projections.

The PRC is establishing new nuclear materials production and reprocessing facilities very likely to support its nuclear force expansion. Although these efforts are consistent with the PRC's goals to increase nuclear energy generation and close its nuclear fuel cycle, Beijing likely considers this dual-use infrastructure as crucial to supporting its military goals, judging from PRC nuclear industry reporting and think tank publications. The PRC has not produced large quantities of plutonium for its weapons program since the early 1990s and probably will need to begin producing new plutonium this decade to meet the needs of its expanding nuclear stockpile. Despite its public support for a Fissile Material Cutoff Treaty, the PRC has rejected calls for a moratorium on production of fissile material for use in nuclear weapons. It is likely that Beijing intends to produce nuclear warhead materials for its military in the near term.

Weapons-Grade Material Production. The PRC has probably completed constructing one of its two CFR-600 sodium-cooled fast breeder nuclear reactors at Xiapu and continues to construct the second. Russia is assisting with these reactors, providing highly enriched uranium (HEU) nuclear fuel assemblies. Each reactor can produce enough plutonium for dozens of nuclear warheads annually from blankets surrounding the core (referring to natural uranium around the fuel core for breeding plutonium), according to think tank estimates and informed by PRC state media and nuclear industry reporting. The PRC originally planned to use Russian-sourced mixed-oxide (a blend of uranium and plutonium) fuel for these reactors but changed the order to HEU fuel through 2030, according to nuclear industry reporting. By using HEU fuel, the PRC has the potential to generate additional weapons-grade plutonium. PRC officials claim the CFR-600 reactors are intended to help the PRC achieve its civilian nuclear power and carbon neutrality objectives but the PRC has described the CFR-600s as a "national defense investment project" subject to military nuclear facility regulations. By December 2022, Russia delivered the first three batches of HEU nuclear fuel assemblies to the PRC for the first core loading and the first refueling of the CFR-600. In early 2023, think-tank reporting indicates the quantity of HEU transferred from Russia to the PRC for its CFR-600 reactors is more than the entire amount of HEU removed worldwide under U.S. and International Atomic Energy Agency (IAEA) auspices in the last three decades. In

March 2023, the PRC and Russia signed an agreement with commitments for continued cooperation on fast reactor and reprocessing technology development, extending this relationship for "the decades ahead."

XIAPU NUCLEAR REACTORS



Plutonium Extraction. The PRC could extract the WGPu at its 50-ton per year reprocessing plant at Jiuquan (Plant 404) or one of the 200-ton per year reprocessing plants under construction at the CNNC Gansu Nuclear Technology Industrial Park in Jinta, Gansu Province, the first of which is expected to be operational by 2025. The PRC has reduced transparency in its nuclear program as its capabilities are increasing and has not reported its stockpile of separated plutonium to the IAEA since 2017, according to a Western think tank. The PRC has a Voluntary Offer Agreement that makes some of its civilian nuclear facilities eligible for IAEA safeguards but the IAEA has applied safeguards only to one enrichment plant and one reactor in the PRC.

Uranium and Tritium. In the past several years, the PRC's organization traditionally associated with military uranium enrichment has expanded production capacity and likely will continue to do so. The PRC is also working to expand and diversify its capability to produce tritium by methods, such as using tritium production targets in reactors and extraction from tritiated heavy water, according to PRC nuclear industry reporting.

Nuclear Warhead Production. The PRC is expanding its nuclear warhead production infrastructure. This infrastructure enables the PRC to produce, maintain, and refurbish a greater number of warheads in support of its nuclear stockpile expansion.

Nuclear Testing. The PRC's possible preparation to operate its Lop Nur nuclear test site year-round and lack of transparency on its nuclear testing activities have raised concerns regarding its adherence to the U.S. "zero yield" standard adhered to by the United States, the United Kingdom, and France in their respective nuclear weapons testing moratoria.

Future Nuclear Force

The PRC has not publicly or formally acknowledged or explained its nuclear expansion and modernization. The buildup almost certainly is due to the PRC's broader and longer-term perceptions of progressively increased U.S.-PRC strategic competition. The PLA's nuclear expansion and modernization very likely are tied to its overall military strategy—seeking to close capability gaps and become a competitive global power. As a result, the PRC probably perceives that a stronger nuclear force is needed to deter U.S. intervention, check potential nuclear escalation or first strike, and will allow for increased control of the scope and scale of escalation during a conflict in a way its previously smaller and less diverse nuclear force could not.

The PLA seeks a larger and more diverse nuclear force, comprised of systems ranging from low-yield precision strike missiles to ICBMs with multi-megaton yields to provide it options at every rung of the escalation ladder. Developing robust nuclear strike options likely is intended to predominantly deter against a "strong enemy" as well as to deny an adversary victory if a war escalates to the nuclear domain. The PLA's expanding nuclear force will enable it to target more U.S. cities, military facilities, and leadership sites than ever before in a potential nuclear counterstrike. While PRC leaders have historically judged that being able to inflict even limited damage during a nuclear counterstrike was sufficient for deterrence—an "assured retaliation" capability—the PRC's force modernization suggests that it seeks the ability to inflict far greater levels of overwhelming damage to an adversary in a nuclear exchange.

Stockpile Size. By 2030, DoD estimates that the PRC will have over 1,000 operational nuclear warheads, most of which will be fielded on systems capable of ranging CONUS. Beijing has not declared an end goal nor acknowledged the scale of its expansion, has resisted calls bilaterally with the United States and in multilateral fora for efforts to practically manage nuclear risks and increase transparency, and has declined to engage in substantive arms control discussions. The PRC's long-term nuclear requirements—and the relationship between the PRC's nuclear requirements and its national strategy and goal to field a "world-class" military by mid-century—remain unclear from public sources.

Hypersonics and Fractional Orbital Bombardment. The PRC probably is developing advanced nuclear delivery systems, such as a strategic HGV and a FOB system, in part due to long-term concerns about United States missile defense capabilities as well as to attain qualitative parity with future worldwide missile capabilities. A "long-range" DF-27 ballistic missile is deployed to the PLARF and likely has a HGV payload option as well as conventional land-attack, conventional antiship, and nuclear capabilities. Official PRC military writings indicate this range-class spans 5,000–8,000 km, designating the DF-27 as an IRBM or ICBM, and PRC media indicates that it can potentially range as far as Alaska and Hawaii. In 2023, a PRC-based commentator stated that the DF-27 can be used to strike high-value targets on Guam, indicating that the DF-27 would primarily be used for regional conventional strikes during a conflict. On July 27, 2021, the PRC tested an ICBM-range HGV that travelled 40,000 km. The test likely demonstrated the PRC's

technical ability to field a FOB system, which can facilitate difficult to track attacks on the U.S. homeland. The PRC does not appear to have tested a FOB system in 2022 or 2023.

Lower-Yield Nuclear Weapons. The PRC probably seeks lower yield nuclear warhead capabilities for proportional response options that its high-yield warheads cannot deliver. PRC strategists have highlighted the need for lower-yield nuclear weapons to increase the deterrence value of the PRC's nuclear force, though they have not defined specific nuclear yield values. A 2017 defense industry publication indicated a lower-yield weapon had been developed for use against campaign and tactical targets that would reduce collateral damage. By late 2018, PRC concerns began to emerge that the United States would use low-yield weapons against its Taiwan invasion fleet, with related commentary in official media calling for proportionate response capabilities. The DF-26 is the PRC's first nuclear-capable missile system capable of precision strikes and, therefore, is the most likely weapon system to field a lower-yield warhead in the near term.

Launch on Warning. The PLA is working to implement a launch on warning (LOW) posture this decade, called "early warning counterstrike" (预警反击), where warning of a missile strike leads to a counterstrike before an enemy first strike can detonate. PLA writings suggest multiple manned C2 organs are involved in this process, warned by space- and ground-based sensors. This posture is broadly similar to the U.S. and Russian LOW posture. The PRC probably seeks to keep at least a portion of its force, especially its new silo-based units, on a LOW posture. Since 2017, the PLARF has conducted exercises involving early warning of a nuclear strike and LOW responses.

The PRC's desire to attain a LOW posture date back to the 1970s and 1980s, when the PRC considered using land-based ballistic missile early warning radar to support a LOW posture for its silo-based CSS-4 ICBMs but, apparently, this early warning system was unreliable. In recent years, the PRC has been able to make advances in early warning needed to support a LOW posture. The PRC has several ground-based, large-phase array radars—similar in appearance to U.S. PAVE PAWS radars—that could support a missile early warning role. Progress has likely been made in space-based early warning as well. As of 2022, the PRC likely has at least three early warning satellites in orbit. In 2019, President Putin of Russia stated that Russia is aiding the PRC in developing a ballistic missile early warning system.

Despite these developments, the PRC has called on other states to abandon similar LOW postures to enhance strategic stability while declining to engage in substantive dialogue on risk reduction. The PRC seems to believe a LOW posture is consistent with its NFU policy, given that it involves a retaliatory strike that occurs after warning of an inbound first attack from an adversary. At the same time, PRC military writings note that C2 systems—including early warning systems—can be a source of accidental nuclear war. In November 2023, China engaged with the United States in discussions on issues related to arms control and nonproliferation but since has refused to return to arms control talks. The PRC has refused to join the Hague Code of Conduct or participate in other confidence-building measures (CBMs), such as a launch notification arrangement with the United States, to reduce the risk of accidental nuclear war. However, the PRC does have a bilateral missile and carrier rocket launch notification agreement with Russia called the Russian-PRC inter-governmental agreement signed in 2009, which was extended for 10 years in 2021—though little additional information regarding the implementation of the agreement is known.

BIOLOGICAL AND CHEMICAL RESEARCH

The PRC continues to engage in biological activities with dual-use applications, which raise concerns regarding its compliance with the Biological Weapons Convention (BWC). The PRC acceded to the BWC in 1984 and regularly submits to CBMs under the BWC; however, the PRC's CBM reporting has never acknowledged its past offensive program. As part of its historical biological weapons program, the PRC had reportedly weaponized ricin, botulinum toxins, and the causative agents of anthrax, cholera, plague, and tularemia.

From the available information, the United States cannot certify that the PRC has met its obligations under the Chemical Weapons Convention due to concerns regarding the PRC's research of pharmaceutical-based agents (PBAs) and toxins with dual-use applications. Scientists at a PRC military institute have expressed interest in military applications of PBAs, including synthesis, characterization, and testing of PBAs with dual-use applications. Available information on studies at PRC military medical institutions indicates that researchers identify, test, and characterize diverse families of potent toxins with dual-use applications. The PRC's annual CBMs do not include information on this dual-use biological research on pathogens and marine and animal toxins at PLA institutions.

UNDERGROUND FACILITIES

The PLA maintains a robust and technologically advanced underground facility (UGF) program to conceal and protect all aspects of its military forces, including C2, weapons of mass destruction, logistics, and modernized missile, ground, air, and naval forces. The PRC has thousands of UGFs and constructs more each year. These UGFs are central to the PRC's counter intervention and power projection efforts, enabling the PLA to protect valuable assets from the effects of missile strikes and conceal military operations from adversaries. The PRC's emphasis on strategic deterrence has contributed to the construction of UGFs for the country's nuclear forces, which aims to survive an initial nuclear first-strike by an adversary.

The PRC began to update and expand its military UGF program in the mid- to late-1980s. This modernization effort took on renewed urgency following the PRC's observation of U.S. and coalition air operations during the 1991 Gulf War and their use in OPERATION ALLIED FORCE. These military campaigns convinced the PRC it needs to build more survivable, deeply buried facilities to protect military assets from the effects of penetrating conventional munition and nuclear strikes. Since the 2015–2016 military reforms, the PRC has expanded its UGF program to support survivable and redundant nodes for its wartime contingency planning. These nodes aim to enable continuous C2, communications, sustainment, and counterstrike capabilities across all PLA services and domains as well as its joint forces. The PRC will likely continue to develop and expand its UGF program to support its expanding forces and military modernization.

CHAPTER THREE: OPERATIONAL STRUCTURE AND ACTIVITIES ON CHINA'S PERIPHERY

THEATER COMMANDS

Key Takeaways

- The PRC continues to refine military reforms associated with the establishment of the Eastern, Southern, Western, Northern, and Central Theater Commands, which are organized based on the PRC's perception of peripheral threats.
- Under the direction of the CMC, each Theater Command has operational authority over conventional forces in the theater.
- In 2023, the PLA conducted multiple joint exercises focused on testing combat readiness and capabilities. The exercises included amphibious landing training, counter intervention, and seizing domain superiority.

The PRC steadily improves joint operations in the five theater commands, which were established in early 2016. Each theater command receives direction from the CMC; has operational authority over assigned PLA, PAP, and militia forces in its theater; and is responsible for all conventional combat and non-combat operations in its area of responsibility. Theater commands develop theater-specific strategies to prepare to fight and win against an adversary, develop joint operational plans and military capabilities, respond to crises, and safeguard the sovereignty and stability of claimed territories. The strategic directions of the theater commands are based on PRC perceptions of peripheral threats:

- ETC: Taiwan, ECS
- STC: SCS; Southeast Asia border security; territorial and maritime disputes
- WTC: India, Central Asia, "counterterrorism" in Xinjiang and Tibet
- NTC: Korean Peninsula, Russia border security
- CTC: Capital defense; surge support to other theaters.

EASTERN THEATER COMMAND

Key Takeaways

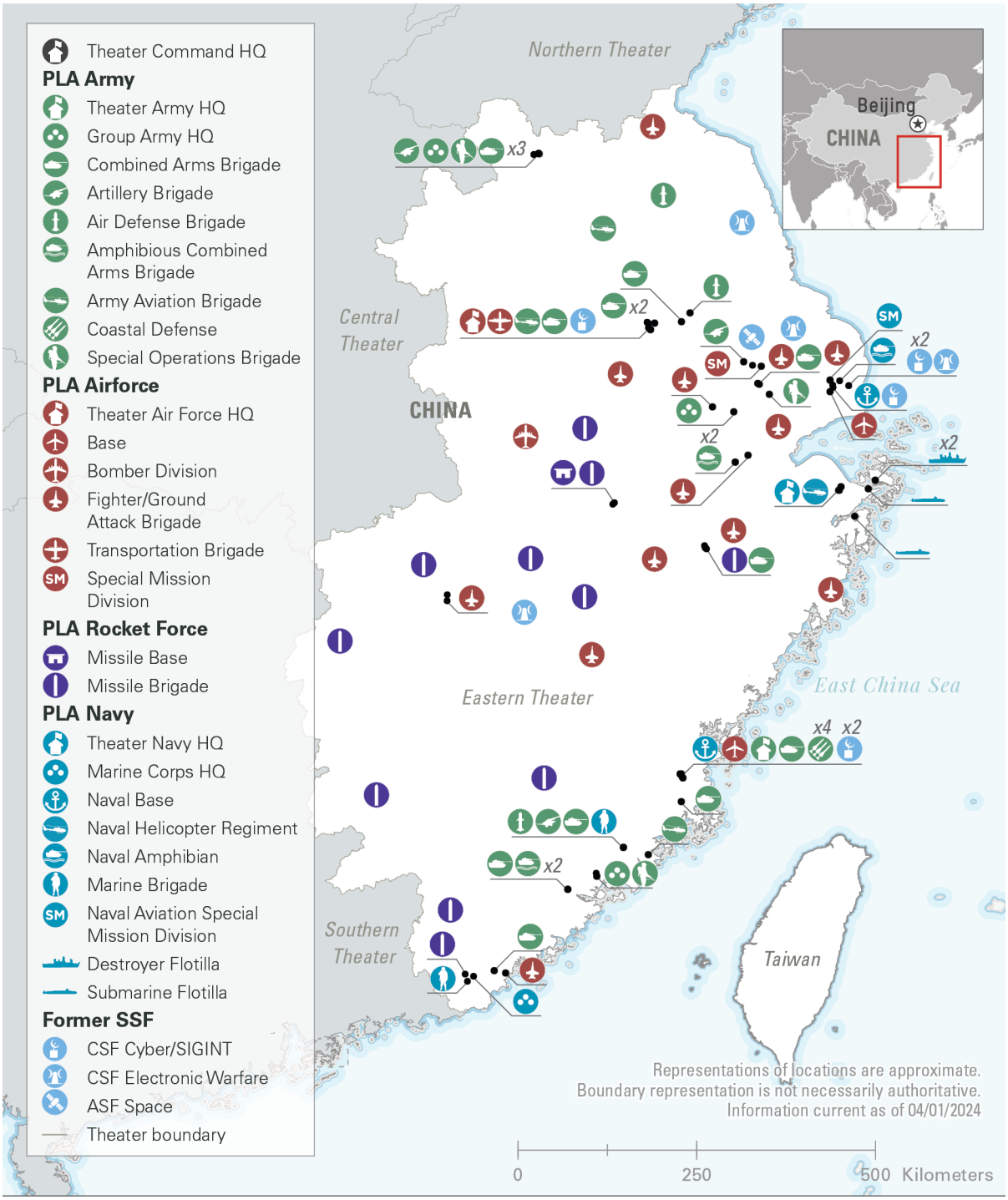
- The ETC is oriented toward Taiwan and the ECS.
- The ETC likely would oversee a Taiwan Campaign.
- The ETC was responsible for executing exercise JOINT SWORD, aimed at pressure Taiwan in April 2023.

The ETC has responsibility for the ECS and likely executes operational control over military matters related to Taiwan and Japan, including contingencies in and around the Taiwan Strait and the Senkaku Islands.

During 2023, the ETC engaged in a series of training events and exercises to improve joint operations and combat readiness, organizing exercises and drills consisting of long-distance training and mobilization, aerial combat, live-fire training, and the use of modified civilian ferries to augment transportation.

Major PLA units in the ETC include the PLAA's 71st, 72nd, and 73rd GAs comprised of 18 combined arms and amphibious combined arms BDEs; two PLAN naval bases, two submarine flotillas, and two destroyer flotillas; the Marine Corps headquarters and two BDEs; two air bases, 13 fighter/ground attack BDEs, one transportation BDE, one special mission aircraft division and one bomber division; and 11 PLARF missile BDEs and a PLARF combat missile base. During a contingency, the ETC likely exercises command over some then-SSF units in theater and receives strategic intelligence support elements of the former SSF to improve battlefield awareness and facilitate joint operations in the theater. The ETC likely commands all CCG and maritime militia ships conducting operations related to the ongoing dispute with Japan over the Senkaku Islands.

PLA FORCE LAYDOWN IN EASTERN THEATER COMMAND



2023 Eastern Theater Command Leadership

Commander: **General Lin Xiangyang** [林向阳]
Previous Position: Commander, Central Theater Command
Date of Birth (DOB): October 1964
Age: 59
Birthplace: Fuzhou, Fujian Province

Education: Nanchang Army Academy; Studied abroad in Russia; attended a class at PRC NDU for young- and middle-aged cadres

Political Commissar: **Admiral Liu Qingsong** [刘青松]
Previous Position: Political Commissar, NTC
DOB: November 1963
Age: 60
Birthplace: Jinan, Shandong Province
Education: Unknown

Chief of Staff: **Lt General Hong Jiangqiang** [洪江强]
Previous Position: Commander,80th Group Army, NTC Army
DOB: 1965
Age: ~58
Birthplace: Zhangzhou, Fujian
Education: Unknown

For Taiwan-related issues, refer to the Developments in the Security Situation in the Taiwan Strait section.

SOUTHERN THEATER COMMAND

Key Takeaway

The STC is oriented toward the SCS, Southeast Asia border security, and territorial and maritime disputes. The STC responds to U.S. freedom of navigation operations in the SCS and can assume command as needed over all CCG and CMM ships conducting operations enforcing the PRC's claimed sovereignty and supporting PLA operations. In 2023, STC units performed multiple live-fire drills and amphibious training events near PRC-occupied features in the SCS.

The STC covers mainland and maritime Southeast Asia, including the SCS. This geographic area implies that the STC is responsible for securing the SCS, supporting the ETC in any operation against Taiwan, and assuring the security of sea lines of communication (SLOCs) vital to the PRC's global ambitions in the SCS. The STC is responsible for responding to U.S. freedom of navigation operations in the SCS by regularly tracking and reacting to U.S. ships operating in the PRC's dashed-line claim.

Major PLA units in the STC include the PLAA's 74th and 75th GAs comprised of 12 combined arms and amphibious combined arms BDEs and two infantry BDEs; two PLAN naval bases, a nuclear submarine base, two submarine flotillas, two destroyer flotillas, and an aircraft carrier task group; two Marine Corps BDEs and one SOF BDE; two air bases, 14 fighter/ground attack BDEs (includes Navy aviation), one transportation BDE, one special mission aircraft division, and one bomber division; and 10 PLARF missile BDEs and two PLARF combat missile bases.

The STC plays a significant role in the PLA's bilateral and multilateral exercises with countries in Southeast Asia, such as participating in bilateral military exercises with Lao People's Democratic Republic, Singapore, and Cambodia in 2023. The STC participated in the multilateral military

exercise, Peace and Friendship-2023, hosted in Guangdong and attended by Cambodia, Lao PDR, Malaysia, Thailand, and Vietnam.

The PLA Hong Kong and Macao garrisons are subordinate to the STC. In August 2023, the PLA Hong Kong and Macao garrisons conducted an annual rotation of forces. Since 1997, the PLA has rotated forces by land, air, and sea from Shenzhen at night, nominally as part of the usual annual rotation. Since the 2019 pro-democracy protests, the PRC has maintained a rotational deployment of PAP forces in Hong Kong. The PAP and PLA units publicly highlight their anti-riot, counterterrorism, and disaster prevention training.

In November 2023, the STC led live-fire drills, including the deployment of howitzers and counter-battery radars at the PRC-Burma border focused on mobility, border control, and firepower capabilities. The exercise occurred shortly after the Three Brotherhood Alliance (a pro-democracy collation composed of ethnic armed organizations [EAOs] in Burma) launched Operation 1027 against the junta's State Administrative Council in the north of the country, near the PRC-Burma border. The PLA commander of the exercise noted that the exercise showed the PLA's determination and capability to defend national sovereignty and border stability. In late April, the PRC conducted additional live-fire drills in response to fighting at the border. The increased exercise activity is in response to the expansion of internal unrest in Burma following an October attack by EAOs against the military junta near the border with the PRC.

In 2023, the PRC's first domestically produced aircraft carrier, the *Shandong,* conducted three major far seas training events in April, September, and November. The trainings included operating near Guam, participating in Joint Sword exercises near Taiwan, and breaking the PLA's previous record for aircraft sorties in a deployment. With the PRC's other aircraft carrier, *Liaoning* in maintenance for 2023, the increase in training with *Shandong* demonstrates the PLA's capabilities further from the PRC's borders and into the Philippine Sea.

SOUTHERN THEATER COMMAND



2023 Southern Theater Command Leadership

Commander: **General Wang Xiubin [王秀斌]**

Previous Position: Chief of Staff, ETC; Deputy Commander, ETC
DOB: March 1964
Age: 58
Birthplace: Nantong, Jiangsu Province
Education: NDU's Joint Command and Staff College; Postgraduate class at Zhejiang University; Taught at Nanjing Artillery Academy

Political Commissar: **General Wang Wenquan [王文全]**
Previous Position: Political Commissar, PLA Joint Logistics Support Force
DOB: December 1962
Age: 61
Birthplace: Xinzhou County, Hubei Province
Education: Unknown

Chief of Staff: **Vice Admiral Liu Zizhu [刘子柱]**
Previous Position: Deputy Commander, STC
DOB: April 1958
Age: 64
Birthplace: Duchang, Jiangxi Province
Education: Unknown

WESTERN THEATER COMMAND

Key Takeaway

The Western Theater Command (WTC) is oriented toward India and counterterrorism missions along the PRC's Central Asia borders. The WTC focuses on Xinjiang and Tibet Autonomous Regions, where the CCP perceives a high threat of separatism, terrorism, and extremism. The WTC is geographically the largest theater command in the PRC and is responsible for responding to conflict with India, border interactions with Central Asian states, and what the PRC refers to as the "three evil forces" of terrorism, separatism, and extremism in Tibet and Xinjiang.

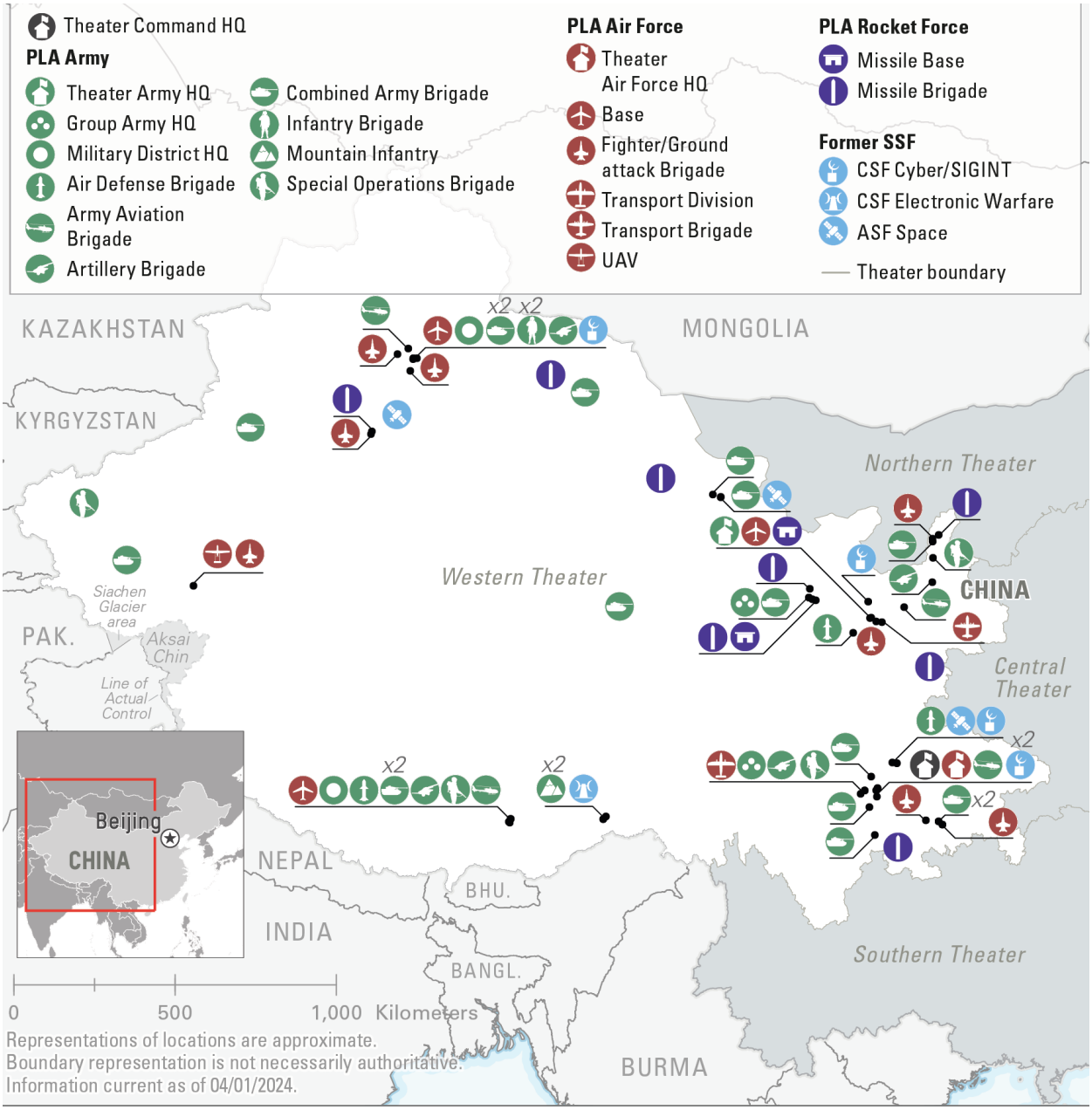
Major PLA units in the WTC include the 76th and 77th GAs, Xinjiang Military District (84th GA), and Xizang Military District (85th GA) comprised of 16 combined arms BDEs and three infantry BDEs; three air bases, eight fighter/ground attack BDEs, one transportation division, one transportation BDE, and one UAV unit; and eight PLARF missile BDEs and two PLARF combat missile bases.

The WTC's primary focus is on securing the PRC's border with India. In recent years, differing perceptions between India and the PRC regarding border demarcations have facilitated multiple clashes, force buildups, and military infrastructure construction. In June 2020, PLA and Indian patrols clashed in Galwan Valley—the most violent clash between the two countries in 45 years. The PLA has not drawn down its positions or troop numbers since the 2020 clash and has built infrastructure and support facilities to maintain multiple BDE deployments along the LAC. WTC and Indian commanders have held 21 corps commander-level talks since the 2020 clash.

Domestically, the WTC focuses on the Xinjiang and Tibet Autonomous Regions, where the CCP perceives a high threat of separatism and terrorist activity, particularly among Uyghur populations in Xinjiang. It serves as a backstop should civilian authorities and paramilitary forces need assistance. In January 2024, the PRC State Council Information Office issued a white paper, "China's Legal Framework and Measures for Counter-terrorism," which was the PRC's first comprehensive white paper on the subject; previous publications were regionally focused. Beijing likely issued a broad counterterrorism policy to all theater commands and military districts to alleviate perceived targeting of minority populations in the WTC. In August 2023, Xi Jinping

visited Urumqi in Xinjiang to reinforce his counterterrorism policies in Xinjiang and urged to "more deeply promote the Sinicization of Islam and effectively control illegal religious activities."

WESTERN THEATER COMMAND



2023 Western Theater Command Leadership

Commander: **General Wang Haijiang** [汪海江]
Previous Position: Commander, Xinjiang Military District
DOB: July 1963
Age: 60
Birthplace: Ziyang, Sichuan Province
Education: Unknown

Political Commissar: **General Li Fengbiao** [李凤彪]
Previous Position: Commander, SSF
DOB: October 1959
Age: 64
Birthplace: Baoding, Hebei Province
Education: Xinyang Army Infantry School; received a Master's degree in strategic studies from NDU

Chief of Staff: **Lt General Zhang Jian** [张践]
Previous Position: Commander, STC Army
DOB: 1963
Age: 60
Birthplace: Yiyang, Hunan Province
Education: Unknown

NORTHERN THEATER COMMAND

Key Takeaway

The NTC is oriented toward the Korean Peninsula and Russian border security. The NTC includes the PRC's provinces bordering Mongolia, Russia, North Korea, and the Yellow Sea. It is responsible for operations along the PRC's northern periphery and border security associated with North Korean, Russia, and Mongolia.

Major PLA units in the NTC include the PLAA's 78th, 79th, and 80th Group Armies comprised of 17 combined arms BDEs; two PLAN naval bases, a nuclear submarine base, two submarine flotillas, two destroyer flotillas, and an aircraft carrier task group; three Marine Corps BDEs and an PLANMC aviation BDE; two air bases, 14 fighter/ground attack BDEs, one transportation BDE and one special mission aircraft division; and eight PLARF missile BDEs and one PLARF combat missile base.

During a contingency, the NTC likely exercises command over some former SSF units in theater and receives strategic intelligence support from the elements of the former SSF to improve battlefield awareness and facilitate joint operations within the theater. The North Theater Navy would be responsible primarily for protecting the sea approaches to northern China but could provide mission-critical assets to support other naval forces during contingencies beyond the Northern Theater. In 2023, NTC forces conducted various joint- and single-service training activities, including destroyer maritime training, submarine training, and Northern/Interaction-2023—a bilateral air and naval "strategic maneuver" with Russia in the Sea of Japan.

NORTHERN THEATER COMMAND



2023 Northern Theater Command Leadership

Commander: **General Wang Qiang** [王强]
Previous Position: Commander, WTC Air Force; Deputy Commander, WTC
DOB: ~1963
Age: ~61
Birthplace: Zigong, Sichuan Province
Education: Unknown

Political Commissar: **General Zheng Xuan** [郑璇]
Previous Position: Political Commissar, NTC Army; Deputy Political Commissar, NTC
DOB: ~November 1964
Age: 59
Birthplace: Minhou County, Fujian Province
Education: Unknown

Chief of Staff: **Vice Admiral Jiang Guoping** [姜国平]
Previous position: Assistant to the Chief, Joint Staff Department, CMC
DOB: ~October 1962
Age: 60
Birthplace: Weihai, Shandong Province
Education: Dalian Naval Ship Academy

CENTRAL THEATER COMMAND

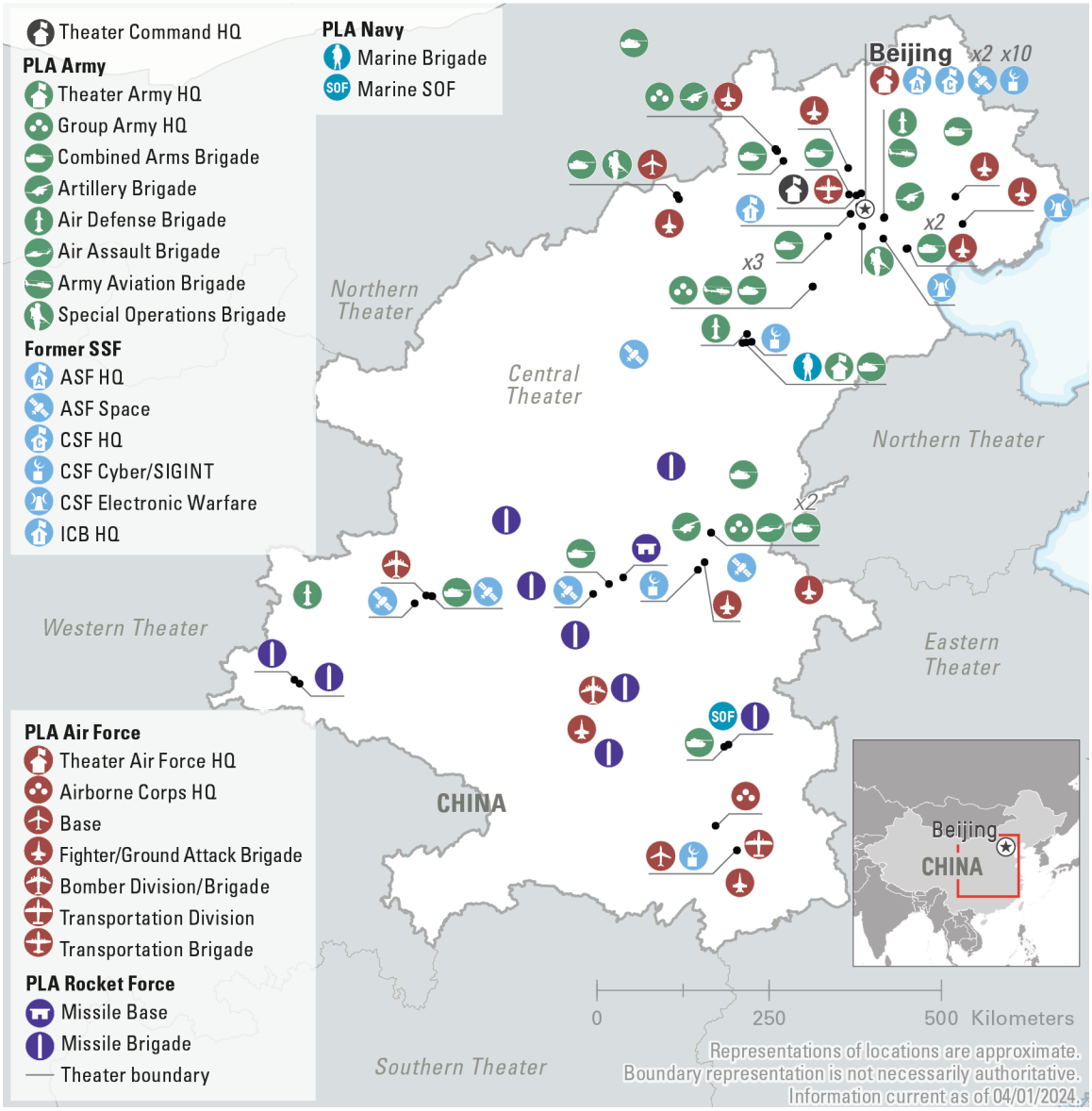
Key Takeaway

CTC's mission is the defense of Beijing while providing support to other theater commands. CTC's primary responsibility is to defend the capital and CCP leadership while providing a strategic reserve to the other theater commands. It is centrally located, connecting the four remaining theater commands.

Major PLA units in the CTC include the PLAA's 81st, 82nd, and 83rd GAs comprised of 18 combined arms BDEs; two air bases, 10 fighter/ground attack BDEs, one bomber division, one bomber BDE, and one transportation BDE; and nine PLARF missile BDEs and one PLARF combat missile base. As of late 2023, the CTC may include a new Marine Corps BDE and SOF BDE reorganized from PLAA units.

In 2023, CTC-subordinate units conducted a range of training and support-related activities. In July, a combined armed BDE from the PLAA's 82nd GA exercised using reconnaissance drones and radar systems to counter rivals equipped with portable anti-aircraft and anti-tank missiles. In August, an 81st GA BDE supported disaster relief efforts in response to flooding in Beijing, transporting emergency supplies and transferring victims. In September, multiple personnel were selected from the 81st GA to join the recently established 10th PRC Peacekeeping Infantry Battalion for the UN mission in South Sudan.

CENTRAL THEATER COMMAND



2023 Central Theater Command Leadership

Commander: **General Huang Ming** [黄铭]
Previous Position: Chief of Staff, PLA Army
DOB: April 1963
Age: 61
Birthplace: Yixing, Jiangsu Province
Education: Unknown

Political Commissar: **General Xu Deqing** [徐德清]
Previous Position: Political Commissar, WTC Army; Deputy Political Commissar, WTC

DOB: July 1963
Age: 60
Birthplace: Chengdu, Sichuan Province
Education: Unknown

Chief of Staff: **Vice Admiral Wang Changjiang** [王长江]
Previous Position: Deputy Commander, NTC
DOB: February 1959
Age: 65
Birthplace: Tangshan, Hebei Province
Education: The PLAAF's Fourth Aviation Academy

DEVELOPMENTS IN THE SECURITY SITUATION IN THE TAIWAN STRAIT

Key Takeaway

- In 2023, the PRC continued to increase diplomatic, political, and military pressure against Taiwan.

Throughout 2023, Beijing continued to erode longstanding norms in and around Taiwan by employing a range of pressure tactics against Taiwan, including maintaining a naval presence around Taiwan, increasing crossings into Taiwan's self-declared centerline and ADIZ, and conducting major military exercises near Taiwan. Since 2022, the PLA has increased its military presence around Taiwan, primarily in the air and naval domains, and through named exercises that serve to punish Taipei for perceived provocations. This increase in normal PLA activity around Taiwan erodes warning times for future coercive military activity but there probably would be unambiguous indicators of larger hostile actions against Taiwan.

Although Beijing reaffirms that "peaceful reunification" is its preferred course of action, the PRC has never renounced the use of force and continues to signal its willingness to use military force against Taiwan. The PLA has a range of options to coerce Taipei based on its increasing capabilities in multiple domains. For example, the PRC could signal its readiness to use force or conduct punitive actions against Taiwan. The PLA could conduct a range of cyberspace, blockade, and kinetic campaigns designed to force Taiwan to capitulate to unification or compel Taiwan's leadership to the negotiation table on the PRC's terms.

The PRC would seek to deter potential U.S. intervention in any Taiwan contingency campaign. Failing that, the PRC would attempt to delay and defeat intervention in a limited war of short duration, which could include some activities in the space and cyber domains, such as EW, network attacks, and IO. In the event of a protracted conflict, the PLA might choose to escalate cyberspace, space, or nuclear activities in an attempt to end the conflict, or it might choose to fight to a stalemate and pursue a political settlement. The PRC's perception of domestic and international receptivity to military action, the expected impact on its economy of resulting sanctions, political trends in Taiwan, and its level of confidence in the PLA's capability to conduct a successful

invasion of Taiwan will determine which military option the PRC chooses during crises. The PLA practiced elements of these military options during its August 2022 large-scale military exercise aimed at pressuring Taiwan and again in April 2023 in response to Taiwan President Tsai Ing-wen's transit of the United States. The PLA could offer Xi the following military options against Taiwan, individually or in combination, with varying degrees of feasibilities associated risk.

Air and Maritime Blockade. PLA writings describe a Joint Blockade Campaign in which the PRC would employ blockades of maritime and air traffic, including cutting off Taiwan's vital imports, to force Taiwan's capitulation. Large-scale missile strikes and possible seizures of Taiwan's offshore islands would accompany a Joint Blockade Campaign in an attempt to compel Taiwan's surrender while, at the same time, posturing air and naval forces to conduct weeks or months of blockade operations, if necessary. The PRC likely would complement its air and maritime blockades with concurrent EW, network attacks, and IO to further isolate Taiwan's authorities and populace and control the international narrative of the conflict. While a blockade of Taiwan remains a viable option for the PRC, such a campaign could have unintended risks of fostering resistance among Taiwan's population and losing escalation control.

Limited Force or Coercive Options. The PRC could use a variety of disruptive, punitive, or lethal military actions in a limited campaign against Taiwan, probably in conjunction with overt and clandestine economic and political activities supported by IO to shape perceptions or undercut the effectiveness or legitimacy of the Taiwan authorities. Such a campaign could include computer network or limited kinetic attacks against Taiwan's political, military, and economic infrastructure to induce fear in Taiwan and degrade the Taiwan population's confidence in their leaders. Similarly, PLA SOF could infiltrate Taiwan and conduct attacks against infrastructure or leadership targets.

Joint Firepower Strike. The PRC could use precision missile and air strikes against key government and military targets, including air bases, radar sites, missiles, space assets, and communications facilities to degrade Taiwan's defenses, neutralize its leadership, or undermine the public's resolve to resist.

Amphibious Invasion of Taiwan. PRC writings describe different operational concepts for an amphibious invasion of Taiwan. The most prominent of these, the Joint Island Landing Campaign, envisions a complex operation relying on coordinated, interlocking campaigns for EW, logistics, air, and naval support. The objectives are to break through or circumvent Taiwan's shore defenses, establish a beachhead, build up combat power along Taiwan's western coastline, and seize key targets or the entire island.

A large-scale amphibious invasion would be one of the most complicated and difficult military operations for the PLA, requiring air and maritime superiority, the rapid buildup and sustainment of supplies onshore, and uninterrupted support. It would likely strain the PRC's armed forces and invite a strong international response. These factors, combined with inevitable force attrition, the complexity of urban warfare, and potential for determined resistance, make an amphibious invasion of Taiwan a significant political and military risk for Xi and the CCP, even assuming a successful landing and breakout past Taiwan beachhead defenses.

Small Island Seizure. The PLA also is capable of attempting various amphibious operations short of a full-scale invasion of Taiwan. With few overt military preparations beyond routine training,

the PRC could launch an invasion of small Taiwan-occupied islands in the SCS, such as Pratas or Itu Aba. A PLA invasion of a medium-sized, better-defended island, such as Matsu or Kinmen, is within the PLA's capabilities. Such an invasion would demonstrate military capability and political resolve while achieving tangible territorial gain and simultaneously showing some measure of restraint. However, this kind of operation involves significant, and possibly prohibitive, political risk because it could galvanize pro-independence sentiment in Taiwan and generate powerful international opposition.

The PLA is preparing for a contingency to unify Taiwan with the PRC by force if perceived as necessary by Beijing while simultaneously deterring, delaying, or denying any third-party intervention on Taiwan's behalf.

As part of a comprehensive campaign to pressure Taiwan and the upcoming Lai administration and signal its displeasure at deepening Washington-Taipei ties, the PRC has persistently conducted military operations near Taiwan and military training for a Taiwan contingency. Throughout 2023, Beijing continued to erode longstanding norms in and around Taiwan by employing a range of pressure tactics against Taiwan, including maintaining a naval presence around Taiwan, increasing crossings into Taiwan's self-declared centerline and ADIZ, and conducting major military exercises near Taiwan.

According to Taiwan Ministry of National Defense (MND) data, the PLA entries into the Taiwan ADIZ persisted throughout the year, with a slight decrease in 2023 to 1,641 events, compared to 1,733 in 2022. Concurrently, PLA aircraft crossed the Taiwan Strait centerline at least 712 times in 2023, up from 552 in 2022, indicating a greater percentage of PLA ADIZ incursions included centerline crossings, according to the same data.

In August 2023, the PLA conducted a low-intensity response to then-presidential candidate and Vice President William Lai Ching-te's transit of the U.S. The PLA sent 25 aircraft across Taiwan's claimed centerline while nine ships were on patrol around Taiwan. In April 2023, the PLA responded to then-President Tsai Ing-Wen's transit of the U.S. with a three-day exercise, JOINT SWORD. As part of the exercise, the PLA conducted an island-encirclement that included an aircraft carrier group to the east of Taiwan.

In January 2024, Taiwan held presidential and general elections, during which incumbent Vice President Lai Ching-te won the presidential election. Following the election, on January 17, the PLA conducted small-scale military maneuvers around Taiwan, consisting of joint air and naval patrols, during which 11 aircraft crossed the Taiwan Strait centerline. The PLA has continued its heightened pressure operations on Taiwan post-election.

In February 2024, a PRC fishing boat capsized near Taiwan's claimed Kinmen Islands, which resulted in the drowning of two of the PRC fishermen. Taiwan claimed in response, five CCG ships entered the restricted waters around the Kinmen Islands. According to the CCG's Fujian division, the CCG will regularly monitor the waters off the southern coast of Xiamen—which is only approximately 5 km from the Kinmen Islands.

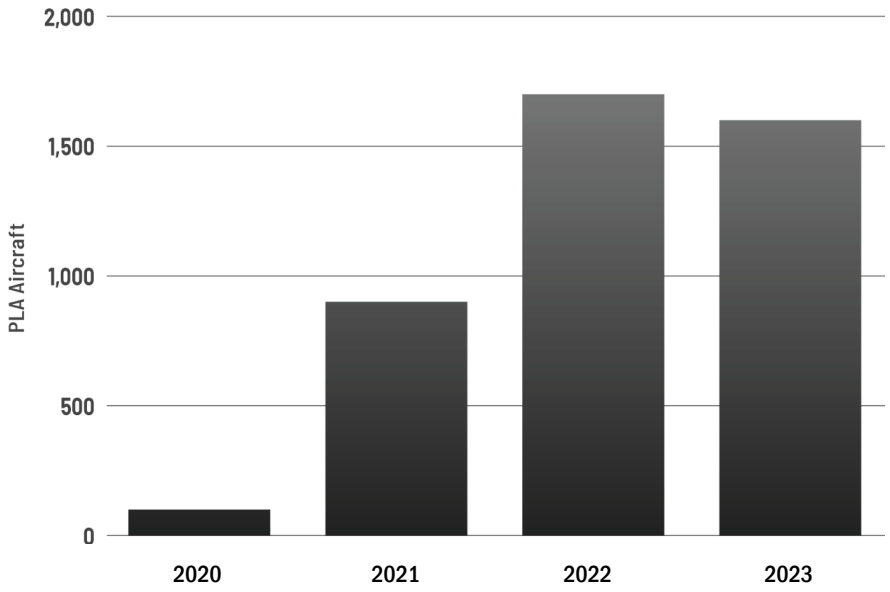
In May 2024, the PLA ETC conducted exercise JOINT SWORD-2024A in response to Taiwan president Lai Ching-te's inauguration. The ETC announcement noted that the 2-day exercise will focus on joint sea-air-combat-readiness patrols, joint seizure of comprehensive battlefield control,

and joint precision strikes on key targets. For the exercise, PLA aircraft, navy vessels, and coast guard vessels encircled the island while operating around Taiwan's outer islands.

The circumstances under which the PRC has historically indicted it would consider the use of force has evolved over time. These circumstances include the following:

- Formal declaration of Taiwan's independence
- Undefined moves toward Taiwan independence
- Internal unrest in Taiwan
- Taiwan's acquisition of nuclear weapons
- Indefinite delays in the resumption of cross-strait dialogue on unification
- Foreign military intervention in Taiwan's internal affairs.

PLA AIRCRAFT ENTERING TAIWAN ADIZ



Since 2016, the PRC has suspended formal communications with Taiwan and steadfastly maintains that Taiwan must accept the PRC's view of the "1992 Consensus" to restart such engagement. PRC leaders have directly equated the "1992 Consensus" to the PRC's "One China principle," which was reaffirmed by President Xi in a January 2019 address to "compatriots" in Taiwan.

The PLA's Current Posture for a Taiwan Conflict

PLAA. The PLAA has increased its posture in the ETC and along the Taiwan Strait, providing the PLAA with enhanced firepower, mobility, and rapid strike capabilities. Significant reorganizations

and amphibious assault training in recent years likely indicate that the Taiwan contingency is a high priority for the Army. Major PLAA contributions to a Taiwan invasion scenario likely include extensive amphibious, army aviation, SOF, and air assault operations.

The PLAA fields six amphibious combined arms BDEs—four in the ETC (nearest Taiwan) and two in the STC. PLAA units continued amphibious assault training as a single service and with joint service counterparts in 2023. Training events refined the tactics of rapid loading, long-distance transport, beach assault under complicated sea situations, and logistic support capabilities. Press reports claimed that the PLA extensively used sea, air, and ground UAS in support of the amphibious assault operation. PLAA amphibious BDEs reportedly conduct realistic, large-scale amphibious operations that are almost certainly aimed at supporting a Taiwan invasion scenario.

PLAN. The PLAN is improving its anti-air, anti-surface, and ASW capabilities, is introducing new multi-mission platforms capable of conducting diverse missions during peace and war, and has increased its posture surrounding Taiwan since August 2022. New attack submarines and modern surface combatants with anti-air capabilities and fourth-generation naval aircraft entering the force are designed to achieve maritime superiority in the FIC and deter and counter any potential third-party intervention in a Taiwan conflict. The PLAN commissioned its third YUSHEN-class LHA in 2022 and, as of December 2023, a fourth YUSHEN-class ship was launched and began sea trials.

The PRC's amphibious fleet has, in recent years, focused on acquiring a modest number of ocean-going LPDs and LHAs ships. There is no indication the PRC is significantly expanding its number of tank landing ships and medium-sized landing craft at this time. Although the PLAN has not invested in the large number of landing ships and medium landing craft that analysts believe the PLA would need for a large-scale assault on Taiwan, it is possible the PLA assesses it has sufficient amphibious capacity and has mitigated shortfalls through investment in other operational capabilities, such as civilian lift vessels and rotary-wing assets to address this gap. The PLA may have confidence in the PRC's shipbuilding industry's massive capacity to produce the necessary ship-to-shore connectors relatively quickly.

PLAAF. The PLAAF has maintained a ready force posture for a variety of capabilities necessary in a Taiwan contingency. It has acquired many advanced aircraft capable of conducting operations against Taiwan without requiring refueling, providing it with a significant capability to conduct air and ground-attack operations. Long-range air defense systems provide a strong layer of defense against attacks on key military installations or population centers on China's mainland. The PRC's development of support aircraft provides the PLAAF with improved ISR capability to support PLA operations. The PLAAF has improved refueling capabilities, expanding its ability to operate further from the PRC and increasing its ability to threaten third-party intervention. In 2023, PLAN Aviation transferred many of its land-based aircraft to the PLAAF, including 300 fighter jets, so that the PLAN could focus on improving carrier-based air operations.

PLARF. The PLARF is prepared to conduct missile attacks against high-value targets, including Taiwan's C2 facilities, air bases, and radar sites, in an attempt to degrade Taiwan's defenses, neutralize Taiwan's leadership, or break the public's will to fight. As of 2023, the PLARF is increasing its presence along the Taiwan Strait with new missile BDEs, possibly indicating an increasing number of deployed missiles.

Former SSF. As of April 2024, the SSF was dissolved into the now CMC-subordinate ASF, CSF, and new ISF. PLA doctrinal writings emphasize the importance of space and cyberspace domains in joint operations, suggesting that these collective units maintain the responsibility for the use of EW and cyberspace operations during a Taiwan contingency, as one of the missions of the force was to seize and maintain information dominance. The former SSF 311 Base would be responsible for political and psychological warfare, such as disseminating propaganda against Taiwan to influence public opinion and promote the PRC's interests.

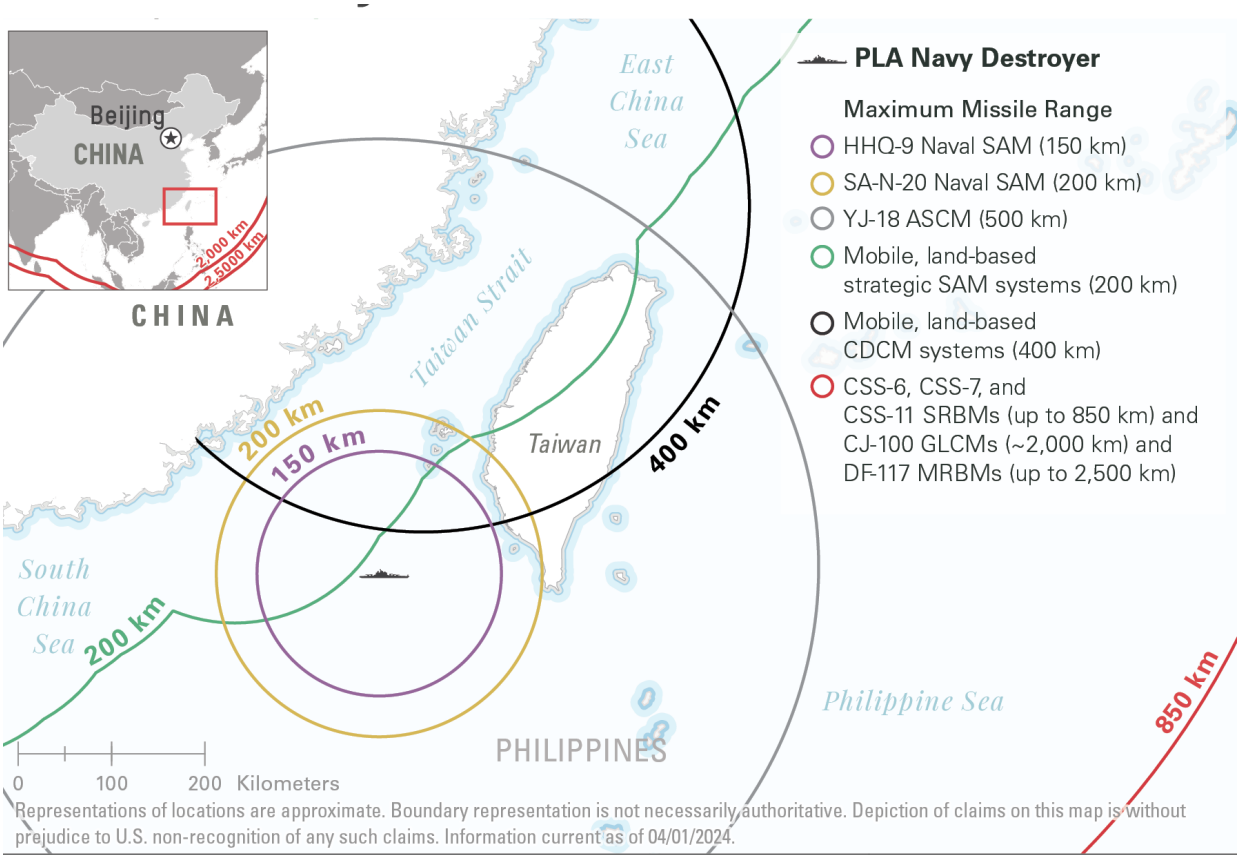
The former SSF would play a strategic information and communications support role, centralizing technical intelligence collection and management and providing strategic intelligence support to theater commands involved in a Taiwan contingency. Following the April 2023 President Tsai transit, the PRC used IO in its responses, such as cyber operations, to cast doubt in Taiwan's public. However, it is currently unknown whether the now CMC-subordinate CSF will continue to maintain the psychological warfare mission under the 311 Base, due to its unclear alignment to the CSF's primary cyber and EW missions.

JLSF. The JLSF's primary goal is to provide joint logistics support to the PLA's strategic and campaign-level operations, such as a Taiwan contingency, by conducting C2 of joint logistics, delivering materiel, and overseeing various support mechanisms. The JLSF participates in joint, theater-level exercises, becoming most relevant when units operate far from their home garrisons and beyond their organic logistics capabilities.

SUMMARY OF PLA EXERCISES AROUND TAIWAN IN 2023

The PRC continues to develop the force strength and composition necessary to secure its national interests and assert its territorial claims along its periphery. PLA training and exercises increasingly focus on military contingencies in the Taiwan Strait while simultaneously delaying or denying third-party intervention. During 2023, the PLA conducted exercises around Taiwan to improve joint operations and combat readiness with simultaneous land, air, and sea exercises. In April 2023, the PLA responded to then-President Tsai Ing-Wen's transit of the U.S. with a 3-day exercise, JOINT SWORD. As part of the exercise, the PLA encircled the main island of Taiwan with naval ships, including an aircraft carrier group east of Taiwan.

PRC MISSILE COVERAGE OVER THE TAIWAN STRAIT



DEVELOPMENTS IN TAIWAN'S ABILITY TO DETER THE MAINLAND

Key Takeaways

- Geopolitical events in 2023 continued to accelerate Taiwan's development of asymmetric concepts and capabilities to counter the PRC's improving capabilities.
- However, Taiwan seeks to balance asymmetric capabilities with conventional ones, the latter of which it relies on to defend against PRC gray-zone operations.

In 2022, Russia's invasion of Ukraine and the PRC's forceful response to then-U.S. Speaker of the House's CODEL to Taiwan in August increased the urgency with which Taiwan is pursuing defense reforms, which continued throughout 2023. In 2024, then President-elect "William" Lai Ching-te indicated that Taipei would seek continuity in President Tsai's defense reform policies while making efforts to enhance defense capabilities. Taiwan's elected president, who is the commander in chief of Taiwan's armed forces, oversees the National Security Council and the MND, which altogether formulate and implement national security and defense policy.

Taiwan is taking steps to address the military threat posed by the PLA, including building its war reserve stocks, growing its defense-industrial base, improving joint operations and crisis response

capabilities, and strengthening its officer and noncommissioned officer corps. Taiwan's 2023 National Defense Report stresses enhanced asymmetric and joint capabilities to deter an invasion in illustrating the military's strategy for defending the island, though Taiwan seeks to balance these asymmetric capabilities with conventional ones, such as fighter jets and surface combatants, which it uses to defend its waters and airspace from PRC gray-zone pressure operations.

In 2023, Taiwan prioritized a whole-of-society approach as a means to improving defensive resilience. The All-Out Defense and Mobilization Agency leads this mission by coordinating efforts between military and civilian agencies to accomplish holistic readiness against PRC gray-zone activities and a potential PLA attack. As part of its whole-of-society defense approach, Taiwan finalized conscription policy changes, which extended conscription from 4 months to 1 year in the beginning of 2024, to enhance military training duration and quality. Separately, Taiwan government and non-government organizations took steps to address PRC disinformation operations through public awareness campaigns.

The Taiwan military comprises three main services—the army, navy, and air force—with approximately 180,000 active-duty personnel across all services. As of 2021, the MND had accomplished its goal of filling 90% of the active-duty billets (169,000) with volunteers. Taiwan's transition to an all-volunteer force increases overall manpower-related costs needed to attract and retain personnel, though these costs are partially offset by cost savings from manpower reductions, which provided some margin to improve individual pay and benefits, housing, and incentive pay.

Taiwan continues to increase its defense budget to support defense acquisitions and strengthen its forces against PRC military pressure. In 2023, the Tsai administration announced defense spending was at a historic high. In August 2023, Tsai's administration proposed total defense spending of about $19 billion for 2023, a 3.5% increase from 2022, which represents about 2.5% of Taiwan's GDP. A Taiwan defense-related think tank poll reported that more than 60% of people in Taiwan support increasing the defense budget to 3% of GDP. During her tenure in office, President Tsai Ing-wen sought to double defense spending to deter PRC aggression and improve Taiwan's ability to defend itself. President Lai Ching-te seeks to continue expanding the defense budget and named it one of his top priorities. Starting in 2021, President Tsai's administration allocated two multi-year supplemental budgets totaling $16 billion for conventional and asymmetric systems. The supplemental budgets cover the purchase of 66 F-16 V fighter jets, missile ships, and anti-ship weapons, such as the Hsiung Feng missile system. The PRC's official defense budget continues to grow to around $220 billion in 2023, with much of that focused on developing the capability to unify Taiwan with the PRC by force.

Starting in 2020, during President Tsai's second term, Taiwan prioritized domestic defense industrial growth and defense equipment production to expand its defense procurements options outside of the United States. Taiwan relies heavily on its domestic defense production capabilities because most countries, save for the United States, are hesitant to sell military equipment to Taiwan, due the threat of economic retaliation from the PRC.

Reservists, conscripts, and civil defense volunteers augment the volunteer active-duty military. Following their conscription period, former conscripts join the pool of approximately 1.7 million reserve personnel. To better coordinate personnel from these disparate sources, Taiwan established the All-Out Defense Mobilization Agency in 2022 to reform its emergency mobilization capability and prepare for and coordinate whole-of-society defense with civilian agencies.

Taiwan has stated that it is working to develop new cost-effective concepts and capabilities for asymmetric warfare. Specific areas of emphasis in Taiwan's strategy include offensive and defensive information and EW, high-speed stealth vessels, shore-based mobile missiles, rapid mining and minesweeping, unmanned aerial systems, and critical infrastructure protection. Taiwan has dedicated significant defense spending toward its Harpoon Coastal Defense Systems, upgrading its existing F-16 fighters and its domestically produced Hai Kun submarine, the first of which was unveiled in 2024.

CONSISTENT U.S. DEFENSE ENGAGEMENT WITH TAIWAN

In response to U.S. defense engagement with Taiwan, Beijing routinely accuses the United States of not abiding by its One China Principle, which the PRC touts as the basis for all diplomacy with Beijing. U.S. defense engagements with Taiwan, as one element of the unofficial U.S.-Taiwan relationship, remain consistent with our one China policy—as guided by the Taiwan Relations Act (TRA), the Three U.S.-China Joint Communiques, and the Six Assurances. U.S. defense engagement with Taiwan has evolved over time in response to the PRC's capacity and willingness to use military coercion against Taiwan. This evolution is consistent and required by U.S. policy.

The 1979 TRA states that the United States "will make available to Taiwan such defense articles and defense services in such quantity as may be necessary to enable Taiwan to maintain a sufficient self-defense capability." In 1982, President Reagan clarified in an internal memo—which the United States made public in 2019—that the quantity and quality of U.S. defense assistance provided to Taiwan be "conditioned entirely on the threat posed by the PRC." President Reagan further emphasized that this linkage is intended as a "permanent imperative" of U.S. foreign policy.

The United States opposes unilateral changes to the cross-strait status quo by either side, does not support Taiwan independence, and expects cross-strait differences to be resolved by peaceful means. United States defense engagement with Taiwan will continue to bolster these positions and be conditioned entirely on the evolving threat posed by the PRC, as enumerated in U.S. policy.

DEVELOPMENTS IN THE SECURITY SITUATION IN THE SCS

In July 2016, an international arbitral tribunal convened at the Philippines' behest pursuant to provisions in the 1982 UNCLOS, ruled that the PRC's claims to "historic rights" to the SCS waters in its ambiguous "dashed line" were contrary to UNCLOS and unlawful. Since December 2019, Indonesia, Malaysia, the Philippines, and Vietnam have explicitly referenced the arbitral ruling in notes verbales to the UN affirming that the PRC's dashed-line claim are unlawful. Beijing, however, categorically rejects the tribunal decision, and the PRC continues to use coercive tactics, including the employment of CCG and CMM ships, with PLAN in overwatch positions, to enforce its illegal claims. The PRC does so in ways calculated to remain below the threshold of provoking

conflict. In 2023, the PRC continued to selectively enforce a yearly, unilateral 3-month fishing ban that includes the waters inside the EEZ of the Philippines and Vietnam to incrementally enforce its unlawful maritime claims.

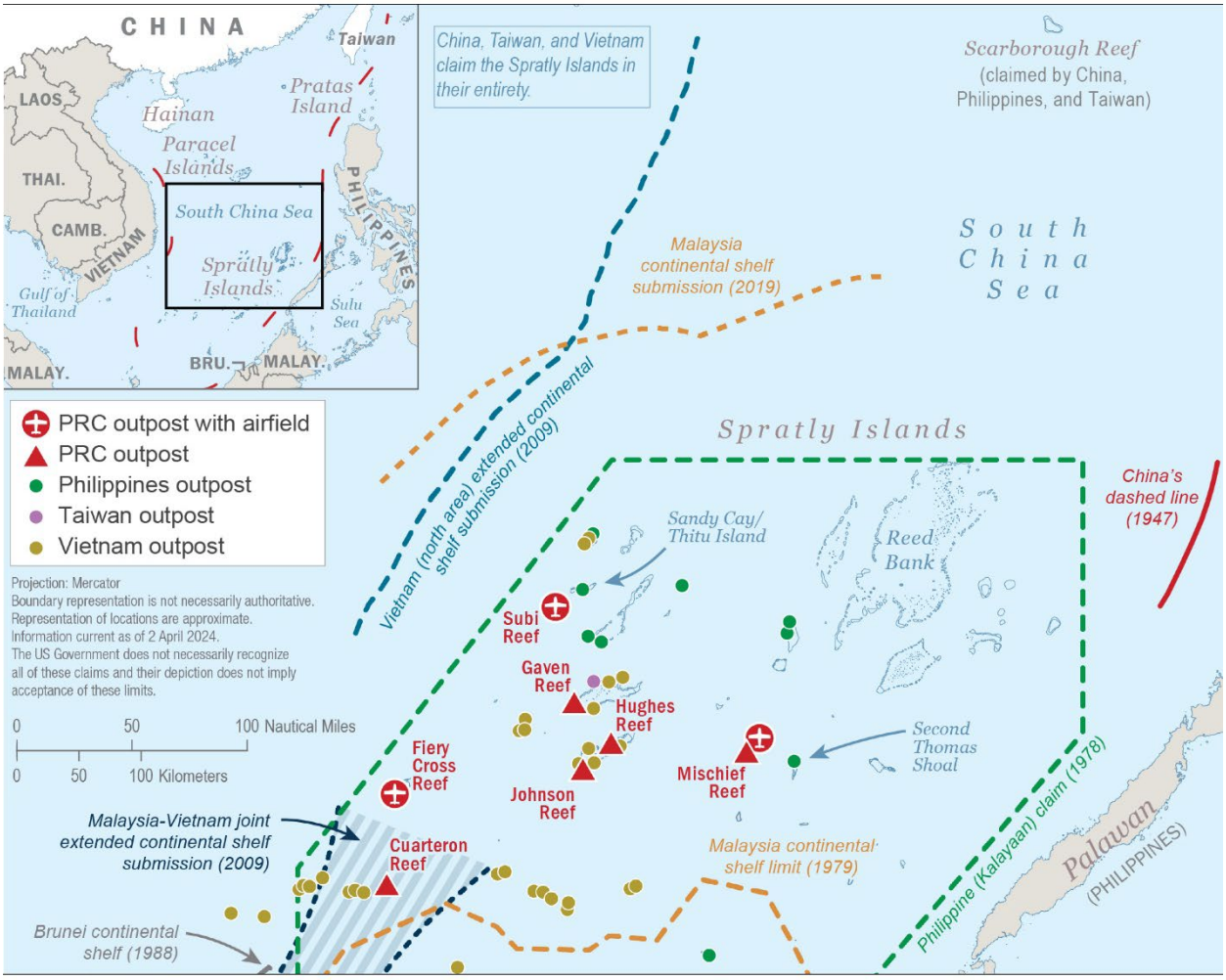
Throughout 2023, tensions between the PRC and the Philippines were notably higher. PRC maritime forces took unsafe and unprofessional measures, including ramming and forcibly boarding Philippine vessels en route to resupplying a Philippine outpost on Second Thomas Shoal.

The PRC states that international military presence in the SCS is a challenge to its sovereignty. Throughout 2023, the PRC deployed PLAN, CCG, CMM, and civilian ships to advance its illegal maritime claims around features, such as Second Thomas Shoal, Scarborough Reef, and Sandy Cay/Thitu Island, as well as in response to oil and gas exploration operations by rival claimants in the PRC's unlawful dashed-line claim.

In 2023, CCG enforced its illegal maritime claims in the SCS using water cannons, aggressive maneuvers, ramming, and floating barriers. The PRC's collisions with Philippine supply ships generated media attention that highlighted the PRC's aggressive behaviors. Since August 2023, the PRC has harassed and, in some cases, impeded Philippine ships' access to Second Thomas Shoal during at least eight resupply missions. During some of these missions, PRC and Philippine ships have collided, which caused minor damage to PRC and Philippine ships and, in two instances, injured Philippine personnel.

In December 2023, the CCG of employed water cannons, erected a floating barrier, and employed a long-range acoustic device to impede Philippine access to Scarborough Reef. The PRC stated the Philippines' subsequent efforts to remove the barrier were illegal and provoked unnecessary confrontation.

OUTPOSTS IN THE SPRATLY ISLANDS AND SELECT DISPUTED FEATURES



Since early 2018, the PRC-occupied Spratly Islands outposts have been equipped with advanced anti-ship and anti-aircraft missile systems and military jamming equipment, representing the most capable land-based weapons systems deployed by any claimant in the disputed SCS areas to date. In mid-2021, the PLA deployed an intelligence-gathering ship and a surveillance aircraft to the Spratly Islands during U.S.-Australia bilateral operations in the region. Throughout 2023, the PRC regularly used its Spratly Islands outposts to support naval and coast guard operations in the SCS. The PRC has added more than 3,200 acres of land to the seven features it occupies in the Spratlys. The PRC has added military infrastructure, including 72 aircraft hangars, docks, satellite communication equipment, antenna array, radars, and hardened shelters for missile platforms.

The PRC has stated these projects are mainly to improve marine research, safety of navigation, and the living and working conditions of personnel stationed on the outposts. However, the outposts provide airfields, berthing areas, and resupply facilities that enable the PRC to maintain a more flexible and persistent military and paramilitary presence in the area. This improves the PRC's ability to detect and challenge activities by rival claimants or third parties and widens the range of response options available to Beijing.

CMM and Land Reclamation in the SCS

Since at least 2014, CMM vessels have engaged in covert small-scale reclamation activity and likely caused physical changes observed at multiple unoccupied features in the Spratly Islands, including Lankiam Cay, Eldad Reef, Sandy Cay, and Whitsun Reef. Beijing likely is attempting to covertly alter these features so that it can portray them as naturally formed high-tide elevations capable of supporting PRC maritime claims out to the farthest extent of the PRC's dashed-line claim. In contrast to the PRC large-scale reclamation program, which was overt with the original status of occupied features well documented, the less well-known historical record about many of the unoccupied features makes them more susceptible to PRC efforts to shape international opinion regarding the status of the features.

PLA SIMULATED ATTACKS

Several PLA exercises and training events have included simulated strikes on mock U.S. assets and infrastructure, including a U.S. military runway on Guam and U.S. Navy vessels. In 2023, the PLA conducted offensive and defensive training, including simulated air-launched strikes against maritime platforms, following U.S. military peacetime operations in East Asia. PRC media sources have stated that this activity is intended to improve the PLA's training realism and prepare for combat operations against foreign forces.

PLA COERCIVE AND RISKY OPERATIONAL BEHAVIOR

Since late 2023, the PLA has reduced the number of coercive and risky air intercepts of U.S. platforms compared to the previous 2 years, when the PLA engaged in notably increased aggressive activity, particularly in the East and South China Seas. However, the PLA continues to conduct unsafe maneuvers in the vicinity of allied forces. In early May 2024, a PLA J-10 fighter fired flares in the path of an Australian Seahawk helicopter operating in support of UN-imposed sanctions against North Korea in the Yellow Sea. The PLA's coercive and risky activities have included unsafe, unprofessional, and other behaviors that have sought to impinge on the ability of the United States and other nations to safely operate where international law allows.

Examples of the PRC's coercive and risky operational behavior against U.S. and allied aircraft have included reckless maneuvers (i.e., maritime bow crossings and barrel rolls and acrobatics in close proximity to aircraft), close approaches in the air or at sea, high rates of closure (i.e., rapid approaches), discharging objects (i.e., chaff or flares) in front of or in close proximity to aircraft, and other actions. The PRC's messaging regarding its forces' operational behavior, such as claiming it is "justified to take forceful countermeasures" against activities that Beijing labels "provocative," suggests centralized coordination, not the behavior of a few isolated PLA officers. The goal of the PLA's behavior during these events is to pressure the United States and other nations to reduce or cease lawful operations near areas where Beijing claims territorial sovereignty.

CHAPTER FOUR: THE PLA'S GROWING GLOBAL PRESENCE

PRC leaders view the PLA's growing global presence as an essential part of the PRC's international activities to create an international environment conducive to the PRC's national rejuvenation.

The CCP continues trying to create international conditions conducive to the PRC's development and compatible with its aspirations for the PRC's rejuvenation as a "great modern socialist country." PRC leaders believe that the PRC's global activities, including the PLA's growing global presence, contribute to creating a "favorable" international environment for the PRC's national rejuvenation. Of note, the PRC's perception of its international security environment is evolving in ways that Beijing views as "increasingly complex." The PRC's view of its increasingly complex security environment likely factors into the PLA's growing global ambitions.

The CCP has tasked the PLA to develop the capability to project power outside the PRC's borders and immediate periphery to secure the PRC's growing overseas interests and advance its foreign policy goals. The PRC is focusing on efforts to develop security relationships with key countries along its periphery. In addition to promoting BRI, the PRC is seeking new cooperative security partnerships with foreign nations, including the expansion of the PLA's global military attaché presence and access, expansion of strategic partnerships, and ensuring more reliable, cost-effective, and diverse sources of energy and other strategic resources. The PRC will likely attempt to discourage further withdrawals from BRI or existing security cooperation by countries who express concerns over the PRC's security and economic motivations for its expansion.

The PRC probably will attempt to further expand the PLA's global military presence through humanitarian assistance, naval escorts and port calls, peacekeeping operations (PKO), arm sales, influence operations, and bilateral and multilateral military exercises. Through these engagements, Beijing can strengthen and expand its diplomatic relationships to advance its foreign policy goals: shaping the international system to align with the PRC's interests, gaining operational experience for the PLA, and attracting foreign interest in hosting PLA bases and dual-use installations abroad.

The PRC has increasingly determined that its armed forces should take a more active role in advancing its foreign policy goals. As the PRC's overseas interests have grown over the past two decades, PRC leaders have increasingly pushed the PLA to develop the necessary capabilities to operate beyond the PRC's borders and its immediate periphery to advance and defend these interests. This has led to the PRC's greater willingness to use military coercion—and inducements—to advance its global security and development interests.

- In 2023, the PLA continued to normalize its presence overseas and build closer ties to foreign militaries. In 2023, Beijing maintained an active peacekeeping force of more than

2,000 personnel stationed abroad, conducted regular anti-piracy escorts in the Gulf of Aden and waters off Somalia, continued construction of a PLA facility at Cambodia's Ream Naval Base, participated in bi- and multilateral military exercises, and restarted in-person military diplomacy suspended by COVID-19.

THE PLA'S EVOLVING MISSION AND TASKS

In 2004, one of the "new historic missions" given to the PLA by then-President Hu Jintao was to support the PRC's overseas interests and diplomacy. The PLAN's evolving focus—from "offshore defense" to "open seas protection"—reflects the PLAN's interest in a wider operational reach. The PLAAF's missions and tasks have similarly evolved toward conducting operations beyond the PRC and its immediate periphery and supporting the PRC's interests by becoming a "strategic" air force. The PLA has embraced its concept of NWMA as an effective way to support and safeguard the PRC's development, expand the PRC's global interests, and gain valuable operational experience.

The PLAN, PLAAF, PLAA, and SSF have deployed abroad for counterpiracy, HA/DR, peacekeeping, training exercises, and space support operations. In the PLA, the PLAN has the most experience operating abroad due to its far seas deployments and counterpiracy missions, the PLAAF likely has the most experience conducting rapid response HA/DR operations abroad, and the PLAA has the most experience conducting PKO. The ASF, formerly subordinate the SSF, operates TT&C stations in Namibia, Pakistan, Argentina, and Kenya. The ASF has a handful of Yuan-wang space support ships to track satellite and ICBM launches.

PLA OVERSEAS MILITARY ACTIVITIES

Counterterrorism. Beijing implements a global counterterrorism strategy that it has used to develop the PLA's operational experience, secure greater access to overseas theaters, and prevent terrorist attacks in the PRC and against PRC citizens and economic projects abroad. The PRC routinely lobbies foreign partners to extradite alleged Uyghur extremists, coordinates with host nations to pursue terrorist threats, and seeks public endorsement of its counterterrorism efforts in multilateral forums. In 2020, Beijing entered an intelligence agreement with Pakistan that expands engagement and cooperation focused on counterterrorism operations in Pakistan and Afghanistan, specifically against Uyghur populations. Since 2021, Beijing is seeking to increase its engagement with the Taliban to ensure the East Turkistan Islamic Movement is unable to operate against Xinjiang from Afghan soil. The PRC probably leverages its relationships with Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan through the Shanghai Cooperation Organization to collect on Uyghurs abroad as well as to protect PRC economic interests abroad. The PRC further leverages involvement in regional security forums, joint border patrols, and international exercises to press its neighbors into adopting the PRC's approach to counterterrorism operations.

Counterpiracy Efforts. In 2008, the PLAN joined anti-piracy efforts in the Gulf of Aden, its first missions outside the Western Pacific. Since then, the PRC has dispatched more than 40 NETFs to the region to escort PRC and foreign ships. This naval activity demonstrates the PLAN's increasing

familiarity with the area, hones its ability to operate in far seas, and enables the PLAN to advance military diplomacy efforts by conducting port calls in Africa and the Middle East. In 2023, the NETF assisted in a NEO of PRC national in Sudan. The same year, the PLAN's 42nd, 43rd, 44th, and 45th NETFs conducted multiple anti-terrorism and anti-piracy drills in the Gulf of Aden and Gulf of Oman and along Somali's coastline.

Peacekeeping Operations. The PRC is the largest contributor of peacekeepers among the five UN Security Council permanent members, having deployed about 50,000 personnel over 31 years. Beijing frames these efforts as advancing cooperative global governance, peaceful development, and the principles of the UN Charter, which are key components of its responsible global power narrative. However, the UN peacekeeping missions in Africa have become a testing ground for the PRC's "far seas operations" as Beijing seeks to extend its reach in tandem with the growth and expansion of its interests. The PRC could use its role in the UN PKOs to collect intelligence on other UN units. Supporting these missions demonstrates the PLA's ability to operate outside of the PRC's borders.

In 2023, the PRC had more than 2,200 peacekeepers participating in eight UN peacekeeping missions by contributing forces to Africa and Middle East-based UN missions in Democratic Republic of Congo, Lebanon, Mali, South Sudan, and Sudan. PRC peacekeepers deployed to UN PKOs, comprised of defense infantry, engineering, and medical personnel. In December 2023, the PRC ended its 10-year Multidimensional Integrated Stabilization Mission in Mali when it expired.

MILITARY COOPERATION

This year, the PLA ramped up participation in exercises with foreign partners and resumed professional military education (PME) probably reflecting the lifting of COVID-19 restrictions. As the PRC's regional and international interests grow increasingly complex, the PLA's international engagement likely will continue to expand. Beijing often relies on senior military visits, bilateral and multilateral exercises and training, peacekeeping, and military assistance to promote the PRC's foreign policy objectives.

Exercises. The PRC uses bilateral and multilateral exercises to normalize its overseas presence and deepen defense ties. Beginning in 2014, the PRC markedly increased participation in bilateral and multilateral exercises. Since then, Beijing has continued to inaugurate recurring exercises, including the FALCON STRIKE air exercise with Thailand (2015), MARITIME SECURITY BELT naval exercise with Russia and Iran (2019), and BLUE SWORD with Saudi Arabia (2019). The PRC has expanded combined exercises with Russia, especially since 2018, when Beijing first participated in Russia's VOSTOCK capstone exercise.

This year, the PRC conducted over 20 exercises with foreign partners, an increase over 2020–2022, probably as COVID-19 concerns caused the PRC to avoid exchanges. PRC and Russian militaries maintained consistency with their 2022 exercise program by conducting two strategic bomber patrols, the maritime exercise NORTH COOPERATION, and a combined naval patrol. The PRC and Russia also held the MARITIME SECURITY BELT trilateral naval exercise with Iran, the fourth iteration of the exercise since 2019. Other bilateral PLA exercises in 2023 included the multi-domain GOLDEN DRAGON exercise with Cambodia, the air exercise FALCON SHIELD

with the United Arab Emirates in Xinjiang, and the second iteration of BLUE SWORD with Saudi Arabia.

Police Cooperation. The PRC uses police cooperation to gain security access, especially in the PICs. In August 2023, the PRC sent police experts and equipment to Vanuatu to assist in maintaining public order. In July 2023, the PRC and Solomon Islands signed a police cooperation agreement as part of an upgrade to their bilateral comprehensive strategic partnership. PRC police personnel work with the Kiribati Police Service in community policing to develop a crime database program.

Professional Military Education. The PRC resumed PME in 2023 after programming was halted due to COVID-19. Beijing considers establishing international PME to create transnational networks of alumni, foster a common understanding of military operational doctrine, and strengthen the PRC's defense and security ties. Over the past decade, the PRC has increased its military exchange programs with a bias toward junior officers. Nearly half of the 70 military academies operated in the PRC admit foreign students but only a few offer senior-level education. The College of Defense Studies of the PLA NDU provides the highest level of training for foreign officers offered by the PRC PLA. In addition to training foreign senior military officials, PLA NDU conducts international exchanges and academic discussions on defense and security issues. The PLA NDU has accepted students from more than 100 partner nations and has pursued relationships with Latin American and African militaries.

Although third countries have historically perceived PRC PME as less prestigious than Russian or U.S. PME, Beijing's growing economic clout and expanded global security presence has bolstered the international reputation of PRC programs. For example, PLA NDU offers students higher stipends and greater exposure to PRC technological and scientific innovations (such as military applications of AI) than Russian schools. Despite the PRC's progress to enhance its PME programs, cultural and linguistic barriers limit the effectiveness of PRC PME. For example, foreign student and host nation student contacts and opportunities for interaction are limited owing to the separation between Chinese and foreign language courses. Military ethics and human rights are off-limits for discussion in the PLA NDU curriculum; students are prohibited from criticizing Beijing's record in these areas, whether they are Chinese or a foreign student.

The PRC cultivates transnational alumni and shared doctrinal understanding through short-term course offerings. Since 2002, the PLA NDU sought to increase exchanges with the international military community by sponsoring annual security seminars which aim to foster cooperation, strengthen military exchanges, and attempt to impart a common approach to issues of interest to the community. The PLA NDU has received thousands of students from over 90 countries and maintains regular contacts with military academies in more than 10 countries and with over 140 countries' militaries.

SELECTED PRC BILATERAL AND MULTILATERAL MILITARY ACTIVITIES

Exercise Name	Type of Exercise	Participants
MOSI II	Naval Exercise	Russia, South Africa
Security Belt/Security Ties	Antiterrorism and Piracy	Iran, Russia
North Cooperation/Northern Interaction and Combined Naval Patrol	Naval Exercise	Russia
Falcon Shield	Aerial Exercise	UAE
Golden Dragon	Antiterrorism and Humanitarian Aid	Cambodia
Shaheen	Aerial Exercise	Pakistan
Sea Guardian	Maritime Exercise	Pakistan
June Combined Bomber Patrol	Strategic Aviation Patrol	Russia
December Combined Bomber Patrol	Strategic Aviation Patrol	Russia
Blue Sword	Naval Exercise	Saudi Arabia

MILITARY ATTACHÉ PRESENCE

The PRC's military attaché presence continues to grow globally, reflecting the PRC's increasing interests in military modernization and partnerships. Military attaché offices manage the day-to-day overseas military diplomacy efforts in over 110 offices worldwide. The attachés serve as military advisors to the ambassador and support Ministry of Foreign Affairs and PLA foreign policy objectives. They perform a variety of PLA military and security cooperation duties, including counterpart exchanges with host-nation and third-country personnel. The attachés conduct clandestine and overt intelligence collection on respective areas of responsibility. Although the general function of an attaché office is the same worldwide, individual attaché offices probably prioritize specific missions or diplomatic priorities based on location, close bilateral relations, or other factors.

Guidelines exist to ensure PLA attachés have operational backgrounds; however, all PLA attachés were previously intelligence officers with the CMC Joint Staff Department Military Intelligence Directorate. With the growth of the PLA attaché network overseas, some attaches are drawn from operational forces for work in foreign capitals and often lack the requisite language skills.

The PRC's military attaché offices vary in size, generally ranging from two to 10 officers. Most offices are made of two to three officers, although officers in countries considered important to the PRC's strategic interests often employ more attachés. These offices potentially include multiple assistant attachés, service attachés such as naval or air force, and additional support staff.

PLA and Paramilitary Activities in Foreign Country EEZs

In the last year, the CCG and CMM supported the PLA's efforts to enhance its force posture and expand its patrolling and reaction locations in foreign countries' EEZ in the FIC. In February 2024, CCG ships patrolled near the Kinmen Islands, including entering Taiwan's restricted waters, following an incident when two PRC citizens aboard a PRC speed boat drowned while trying to evade arrest by the Taiwan Coast Guard. The PRC has deployed aggressive tactics, including blocking, ramming, and using water cannons, against Philippine ships conducting resupply missions to the outpost on Second Thomas Shoal. Throughout 2023, the PRC deployed PLAN, CCG, CMM, and civilian ships to maintain a presence in disputed areas, such as Second Thomas Shoal, Scarborough Reef, and Sandy Cay/Thitu Island. The PRC has patrolled in the EEZ of Indonesia, Vietnam, Brunei, the Philippines, and Malaysia in response to oil and gas exploration operations by coastal claimants in the PRC's dashed-line claim and to incrementally enforce its de facto maritime claims. The PRC bases its aggressive action on claims of rights over most of the SCS which encroaches on the EEZ's of the other countries in the region. In 2023, the CCG continued to increase its duration in the Senkaku Islands' contiguous zone with a record of 352 days, compared to 2022's 336 days. Also in 2023, the PLAN and Russian Federation Navy conducted a combined naval patrol near the Aleutian Islands off the coast of Alaska with anti-submarine exercises and cross-deck helicopter landing.

OVERSEAS BASING AND ACCESS

Key Takeaways

- The PRC is seeking to expand its overseas logistics and basing infrastructure to allow the PLA to project and sustain military power at greater distances.
- A global PLA military logistics network could disrupt U.S. military operations as the PRC's global military objectives evolve.
- Beyond the PLA support base in Djibouti, the PRC is very likely already considering and planning for additional military logistics facilities to support naval, air, and ground forces projection.
- The PRC probably has considered other countries as locations for PLA military logistics facilities, including but not limited to Burma, Thailand, Indonesia, Pakistan, Sri Lanka, United Arab Emirates, Cuba, Kenya, Equatorial Guinea, Seychelles, Tanzania, Angola, Nigeria, Namibia, Mozambique, Gabon, Bangladesh, Papua New Guinea, Solomon Islands, and Tajikistan.
- In June 2022, a PRC official confirmed that the PLA would have access to parts of Cambodia's Ream Naval Base. Two PLAN corvettes became the first ships to dock at the newly constructed pier there in December 2023.

The PRC is seeking to establish a more robust overseas logistics and basing infrastructure to enable the PLA to project and sustain military power at greater distances. In the PRC's view, internal

conflicts, like those in Ethiopia and Sudan prompting civilian evacuations and regional threats like Houthi attacks against shipping in the Red Sea, have demonstrated a greater need for the PLA to operate outside of the PRC's immediate periphery. The PRC asserts that military logistics facilities, like its Djibouti base, will be used to provide international public goods like HA/DR and secure the PRC's lines of communication, citizens, and assets abroad.

Beijing may assess that a mixture of military logistics models, including preferred access to commercial infrastructure abroad, exclusive PLA logistics facilities with prepositioned supplies co-located with commercial infrastructure, and bases with stationed forces, most closely aligns with the PRC's overseas military logistics needs. Some of the PRC's BRI projects could create potential military advantages, such as PLA access to select foreign ports to pre-position the necessary logistics support to sustain naval deployments in waters as distant as the Indian Ocean, Mediterranean Sea, and Atlantic Ocean to protect its growing interests.

PRC military academics assert that bases abroad can enable forward deployment of PLA forces and support military conflict, diplomatic signaling, political change, bilateral and multilateral cooperation, and training. They suggest that a military logistics network could enable intelligence monitoring of the U.S. military.

A global PLA military logistics network could disrupt U.S. military operations as the PRC's global military objectives evolve. Host nations can perform an essential role in regulating the PLA operations, as PRC officials very likely recognize that a stable long-term relationship with the host nation is critical to the success of their military logistics facilities.

Approach for Access. The PLA's approach likely includes consideration of many sites and outreach to many countries but only some will advance to negotiations for an infrastructure agreement, status of forces or visiting forces agreement, or basing agreement. Critical organizations involved in planning and negotiating for military logistics facilities are the CMC Joint Staff Department, the CMC Logistic Support Department, and service headquarters. The PRC's overseas military basing are constrained by the willingness of potential host nations to support a PLA presence. Host nations are likely concerned about risks to sovereignty, regional and international perceptions, and relations with the United States and other countries when considering hosting a PRC military facility. PRC interlocutors likely use all means available to conduct influence operations to gain political favor among elites in host nations while obfuscating the scale and scope of PRC political and military interests.

The PRC seeks to strengthen its security ties through small-scale, in-country efforts to support domestic security. According to a draft copy of the China-Solomon Islands Security Agreement, the PRC would be permitted to send armed police and military personnel to the Solomon Islands to help maintain order, though Honiara has denied this would lead to a PRC military base. As of 2022, Beijing provides occasional personnel support at public events for the Royal Solomon Islands Police Force. In Africa, Beijing maintains an embedded PLA training cadre for local military forces in the Democratic Republic of the Congo and a military training school in Tanzania. Beijing probably pursues such efforts in regions it assesses can help foster favorable environments for its security goals but these efforts do not signal definite interest in overseas basing.

Current PLA Facilities

- **Djibouti.** In August 2017, the PRC officially opened its first PLA base in Djibouti: Doraleh Support Base. PLANMC are stationed at the base with wheeled armored vehicles and artillery but are currently limited in their ability to conduct expeditionary operations due to a lack of helicopters at the facility. Notably, no public evidence indicates that the PRC has used its base to assist in evacuation of PRC citizens despite recent evacuation efforts from Ethiopia and Sudan. In late March 2022, a Type 903A FUCHI class supply ship, *Luomahu* (AOE-964), docked at the 450-meter pier for resupply; this was the first such reported PLAN port call to the Djibouti support base. In May 2022, the pier was announced to be fully operational. The pier likely can accommodate the PLAN's aircraft carriers, other large combatants, and submarines. PLA personnel at the facility have interfered with U.S. flights by lasing pilots and flying drones. The PRC has sought to restrict Djiboutian sovereign airspace over the base.

Potential Facilities with PLA Persistent Access

- **Cambodia.** In June 2021, Cambodian Defense Minister Tea Bahn stated that the PRC would help to modernize and expand Ream Naval Base but would not be the only country given access to the facility. The following June, the PRC and Cambodia hosted a ceremony to mark breaking ground on the PRC-built upgrades of Ream. In December 2023, two PLAN corvettes became the first ships to dock at a new pier at Ream, indicating that the expanded base was nearing completion and the PLA could have a persistent role on site.

Other Areas of Interest

Beyond its base in Djibouti, the PRC is very likely considering and planning for additional military logistics facilities to support naval, air, and ground forces projection.

The PRC has likely considered Burma, Thailand, Indonesia, Pakistan, Sri Lanka, United Arab Emirates, Kenya, Equatorial Guinea, Seychelles, Tanzania, Angola, Nigeria, Namibia, Mozambique, Bangladesh, Papua New Guinea, the Solomon Islands, and Tajikistan. The PRC has probably already made overtures to Gabon, Equatorial Guinea, Namibia, Vanuatu, and the Solomon Islands. The PLA is probably most interested in military access along the SLOCs from the PRC to the Strait of Hormuz and Africa.

ENERGY STRATEGY

KEY TAKEAWAY

The PRC's interest in ensuring reliable, cost-effective, and diverse hydrocarbon sources to support its economic growth drives its overseas energy investments.

The main challenge that the PRC would face in the event of a prolonged military conflict in the Western Pacific would likely be meeting the hydrocarbon demand for its civilian and industrial population. If a military conflict consisted of a naval blockade, the PRC would be cut off from a significant amount of its hydrocarbon imports. In 2023, the PRC imported approximately 11.3

million barrels per day of crude oil, which met about 70% of its consumption, and produced the other 30% domestically. The PRC continues to build its strategic and commercial crude oil storage capacity to safeguard against supply disruptions with a goal to have the equivalent of 90 days' worth of oil imports in storage. At present, capacity is approximately 700 million barrels, equal to about 62 days' worth of oil imports, according to industry data. The PRC met about 41% of its natural gas demand with imports in 2023. Industry experts estimate that the PRC's natural gas imports will increase to about 50% by 2035. In 2023, most of the PRC's oil and natural gas imports came from Central Asia (<1% of oil imports; 23% of gas imports), the Persian Gulf (46% of oil imports; 15% of gas imports), and Russia (19% of oil imports; 22% of gas imports). Russia's invasion of the Ukraine in 2022 prompted Russian oil sanctions and price caps, which led to the PRC importing 24% more Russian crude when compared to the previous year. The PRC's investments in transport networks for oil and gas could help diversify its supply and reduce dependence on strategic chokepoints, such as the Strait of Malacca.

The PRC relies on maritime routes that transit the SCS and Strait of Malacca for most of its hydrocarbon deliveries (approximately 63% of the PRC's oil imports and 41% of its total natural gas imports). Despite the PRC's efforts to diversify energy suppliers, Beijing will most likely continue to rely on oil and natural gas imports from Africa and the Middle East to meet energy demands for at least the next 10 years.

Crude oil pipelines from Russia and Kazakhstan to the PRC demonstrate the PRC's interest in increasing overland fuel supply. In 2023, the PRC imported about 600,000 barrels per day of Russian crude oil via a spur of the East Siberia–Pacific Ocean pipeline. The PRC imports crude oil from Middle Eastern—primarily Saudi—and African suppliers via a crude oil pipeline across Burma. This pipeline has an installed capacity of 440,000 barrels per day, bypasses the Strait of Malacca by transporting crude oil from Kyaukpyu, Burma, to Yunnan Province, PRC, and reduces shipping time by more than a third. However, this pipeline still relies on seaborne oil imports through the Indian Ocean, where the PRC has little power projection capability.

In 2023, approximately 56% of the PRC's natural gas imports came from Turkmenistan via a pipeline that runs through Kazakhstan and Uzbekistan. This pipeline can transport 55 billion cubic meters per year; Turkmenistan and the PRC are planning to expand it to 85 billion cubic meters per year. A natural gas pipeline connecting the PRC to Burma can deliver 12 billion cubic meters per year but only 3.54 billion cubic meters of gas was shipped in 2023. Russia's Power of Siberia gas pipeline supplied approximately 15 billion cubic meters to the PRC in 2023. The pipeline is projected to reach an annual capacity of 38 billion cubic meters per year by 2027.

PRC'S TOP CRUDE OIL SUPPLIERS

Country	Volume (1,000 barrels per day)	Percentage of Imported Crude Oil
Russia	2,144	19
Saudi Arabia	1,723	15
Iraq	1,186	11
Malaysia	1,103	10
United Arab Emirates	837	7
Oman	784	7
Brazil	756	7
Angola	601	5
Kuwait	491	4
United States	286	3
Others	1,390	12
Total	11,301	100

ARCTIC AND ANTARCTIC

Key Takeaways

- The PRC has increased activities and engagement in the Arctic region since gaining observer status in the Arctic Council in 2013.
- The PRC is constructing research stations in Antarctica that include dual-use technology. While the PRC is a relative newcomer to Antarctica, it has undermined the Consensus-based Antarctic Treaty, preparing for 2048, when central aspects of the treaty will be open to renegotiation.

The PRC has increased activities and engagement in the Arctic region since gaining observer status in the Arctic Council in 2013. In January 2018, the PRC published its first Arctic strategy paper that promoted a "Polar Silk Road" and declared the PRC to be a "near-Arctic State," although it has since stopped using this language to describe itself in public fora. The strategy paper identifies the PRC's interests as access to natural resources, SLOC, and promoting an image of a "responsible major country" in Arctic affairs. The strategy highlights the PRC's icebreaker vessels and research stations as integral to implementation.

The PRC maintains civilian research stations in Iceland and Norway and operates three icebreaking research vessels as of early 2023. The first is the *Xue Long*, which, in 2017, became the first PRC official vessel to traverse Canada's Northwest Passage. In 2018, Beijing launched its second icebreaking research vessel, *Xue Long 2*. The *Xue Long 2* can break ice up to 1.5 meters thick, compared to the *Xue Long*'s maximum of 1.2 meters, and is the first polar research vessel that can

break ice while moving forwards or backwards. In February 2023, the PRC's third polar icebreaker—*Zhong Shan Da Xue Ji Di*—completed a 3,000-mile round-trip winter sea trial in the Bohai Sea. The PRC's expanding Arctic engagement has created new opportunities for engagement between the PRC and Russia. The PRC is interested in increasing the use of the Northern Sea Route (NSR) to cut shipping times between Europe and the PRC by approximately a third. The use of the NSR enables the PRC to diversify shipping routes away from the strategic Strait of Malacca. In September 2022, the PRC and Russia conducted a combined naval patrol in the Bering Sea. In 2024, both nations conducted several combined operations including bomber, naval, and coast guard patrols that entered the Arctic region, with the first combined bomber patrol entering the Alaskan ADIZ. PRC-Russia cooperation on Arctic issues throughout 2022 likely created momentum enabling spring 2023 agreements to coordinate Arctic maritime law enforcement and establish a joint working body for the development of the NSR.

On February 7, 2024, the PRC's 40th Antarctic expedition completed its primary goal of building the new Qinling Station on Inexpressible Island in the Ross Sea. The 40th expedition was the first time the PRC used three vessels (icebreakers *Xue Long I* and *II* and the cargo vessel *Tainhui*) in an Antarctic expedition. The PRC now has five active Antarctic stations that are used for environmental research and support to the PRC's space program: The Great Wall Station, Zhongshan Station, Kunlun Station, Taishan Station, and Qingling Station. The PRC endeavors to work more closely with Russia and possibly seeks to revise the Antarctic Treaty in 2048 to afford it the ability to exploit the continent's natural resources.

The PRC is constructing research stations in Antarctica that include possible dual-use technology. While the equipment is ostensibly used for legitimate scientific research and allowable under the Antarctic Treaty, it could be used for unspecified military purposes. For instance, the PRC's Qingling Station in the Ross Sea increases its Antarctic footprint and could provide the PLA with better surveillance capabilities. Qingling Station will provide telemetry, tracking, and communications for scientific polar observation satellite. Its equipment is well-positioned to collect signals intelligence over Australia and New Zealand.

CHAPTER FIVE: RESOURCES AND TECHNOLOGY FOR FORCE MODERNIZATION

Key Takeaways

- The PRC's long-term goal is to create an entirely self-reliant defense-industrial sector—fused with a strong civilian industrial and technology sector—to meet the PLA's needs for modern military capabilities.
- The PRC has mobilized vast resources for defense modernization, including through its MCF Development Strategy as well as espionage activities to acquire sensitive, dual-use, and military-grade equipment. The PRC has substantially reorganized its defense-industrial sector to improve weapon system research, development, acquisition, testing, evaluation, and production.
- In 2023, the PRC announced its official annual military budget would increase nominally by 7.2%, continuing more than 20 years of annual defense spending increases and sustaining its position as the second-largest military spender in the world. The PRC's published military budget omits several major categories of expenditures and, thereby, omits spending on defense and security activities that could account for 40%–90% more than the announced budget. The PRC's actual defense budget is probably approximately $330 billion–$450 billion.

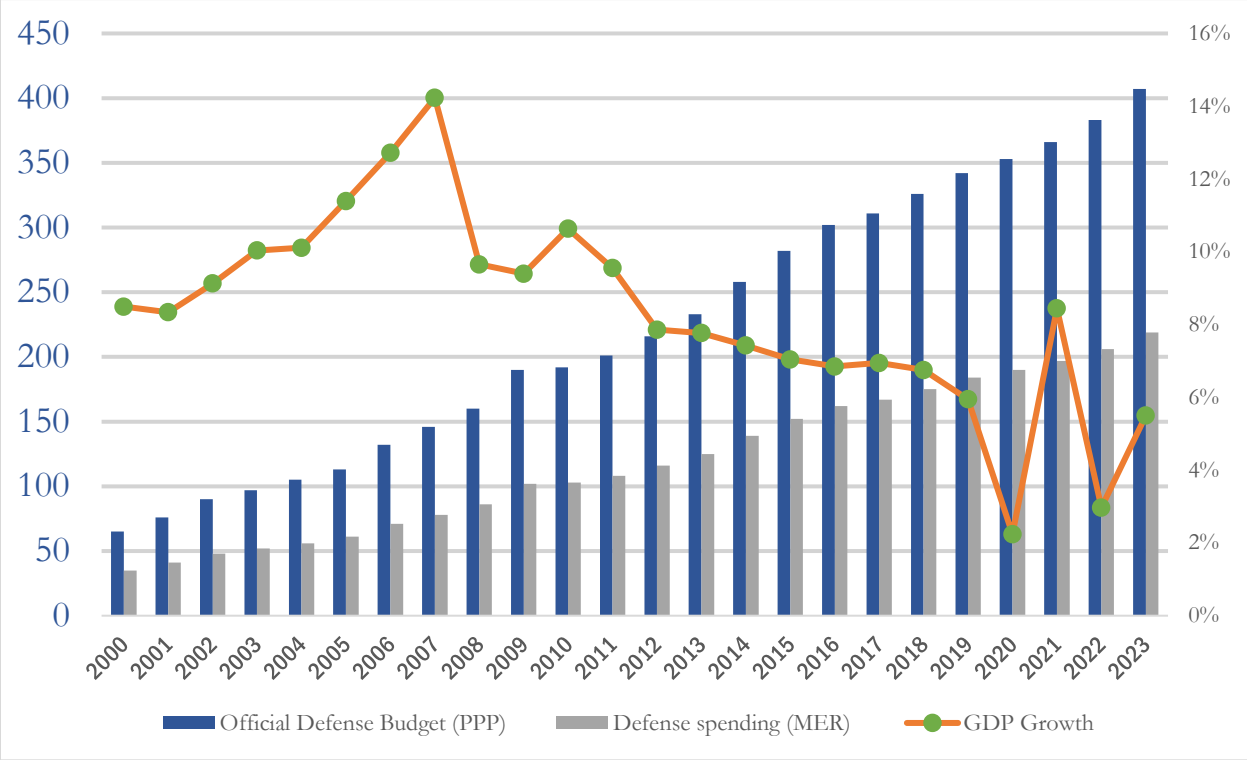
PRC DEFENSE SPENDING

In 2023, the PRC's public defense budget marginally increased in inflation-adjusted prices to $220 billion. According to PRC state media, the new defense budget aligned with PRC military goals associated with its 2027 and 2035 military modernization program. PRC state media reported that the part of the defense budget increase over the prior year focused on modernizing the PLA's weapons and equipment, recruitment and retaining personnel, and enhancing the military's strategic capacities.

The PRC is continuing to reorganize its defense, science, and commercial industries to ensure PLA access to the resources, technologies, and expertise required to militarily surpass the United States and develop capabilities for complex future military contingencies. The PRC's efforts include developing and incorporating military-AI and other emerging disruptive technologies to build an "intelligentized" force sufficiently equipped with high-tech weapons and advanced communications and information technologies to wage and win dynamic wars. While the PRC's MCF strategy supports acquisition of foreign materiel, technology, and expertise through overt and illicit means, the PRC is accelerating efforts to build domestic capacity in these areas and reduce its vulnerabilities to foreign supply chokepoints.

The PRC's announced military spending in 2023 was $220 billion, equivalent to approximately 1.2% of national GDP. This continues more than 20 years of annual defense spending increases and sustains the PRC's position as the second-largest military spender in the world after the United States. The PRC's defense budget has nearly doubled during the past 11 years—data from 2013 through 2023 indicates the PRC's official military budget grew on average 6% annually after adjusting for inflation. The PRC can support continued growth in defense spending for at least the next 5 to 10 years, based on economic data and growth projections.

PRC: OFFICIAL DEFENSE BUDGET (2000–2023)



China's Estimated Total Military Expenditures. A survey of multiple models of the PRC's defense budget estimates that Beijing spends 40% to 90% more than it announces in its public defense budget, which would equate to approximately $330 billion–$450 billion in total defense spending for 2024. This range reflects a standardized estimate in market exchange rates and purchasing power parity. There is a consensus among experts that the PRC's publicly announced defense spending figure does not contain the entirety of PRC investment in its defense, resulting in the development of alternative approaches to assess the total value of this spending. Additional cost-modeling approaches that apply U.S. costs to a part or the whole of China's defense-related spending result in a wider range of final estimates.

The PRC's Estimated Defense Budget Growth. If the PRC's defense budget continues to increase annually in real terms, the PLA can dedicate more money for training, operations, and personnel costs. Economic forecasters project that the PRC's economic growth will slow during the next 10 years, from about 5.2%t in 2023 to around 4% in 2034, which could slow future defense

spending growth. Assuming accurate economic projections and a steady defense burden, the PRC will remain the second-largest spender after the United States.

PLA Personnel Costs

The PRC is facing adverse demographic trends, such as an aging population and low-birth rates. The PLA could respond to the demographics issues by further raising pay standards to support recruitment and retainment efforts, which would place upward pressure on PLA personnel spending relative to other defense spending categories. The PLA is prioritizing recruiting college graduates with science and engineering backgrounds and those experienced in operating high-tech weapons, suggesting the PLA will have to compete with the private sector to attract top talent.

R&D Procurement Costs

Beijing does not transparently announce its military procurement and R&D funding; however, expansion of the defense industrial sector has been a major priority, which likely requires significant investment to reform. Almost all major PRC military platforms are produced by PRC SOEs, which lack competition and, thus, have little incentive to improve efficiency or reduce costs. The PLA's dependence on foreign technologies and components likely increases long-term production costs. However, the PLA is likely increasingly able to outsource some of its R&D costs to the private sector and increase competition through MCF.

Internal Security Spending

The PRC's Central Government claims to spend $32 billion on public security, up an inflation adjusted 7.6%, with PAP expenditures included in this figure. Internal security spending is likely much higher, as most spending takes place at the local level. Spending on the PAP has likely increased since the 2017–2018 reorganizations to focus its mission away from daily law enforcement toward internal security, maritime security, and supporting contingency and emergency operations, which include training to support the PLA during a conflict.

DEVELOPMENTS IN DEFENSE INDUSTRY

Key Takeaways

- The PRC's hypersonic missile technologies have greatly advanced during the past 20 years. Many of the PRC's missile programs are comparable to other international top-tier producers.
- The PRC is the world's top ship-producing nation by tonnage and can produce a wide range of naval combatants, gas turbine and diesel engines, and shipboard weapons and electronic systems, which makes it nearly self-sufficient for all shipbuilding needs.

Missile Industry. The PRC produces a wide range of ballistic, cruise, air-to-air, and SAMs, many comparable in quality to those of other international top-tier producers, for domestic military use and export. The PRC has the world's leading hypersonic missile arsenal and has dramatically advanced its development of conventional and nuclear-armed hypersonic missile technologies during the past 20 years. Beijing fielded its first missile with a HGV in 2020 and tested a new

hypersonic weapon system in 2021, building on previous progress in hypersonic weapons development. The PRC advanced its scramjet engine development in 2022, which has applications in hypersonic cruise missiles. In April 2019, the PLAN revealed during its 70th anniversary celebration that its new guided-missile cruiser can employ long-range, land-attack cruise missiles and, in 2022, launched the YJ-21 hypersonic missile designed to defeat aircraft carriers. In 2022, Beijing made its first delivery of a SAM system to a European nation, Serbia. The PRC is developing beyond-visual-range air-to-air missiles and exploring dual-mode guidance capabilities, which use active radar and infrared homing seekers to improve target-selection capabilities and make missiles more resistant to countermeasures. In 2023, the PL-17 air-to-air missile, which is believed to be able to strike targets from 400 km away, likely reached initial operating capability. In 2024, the PRC announced its intention to launch two domestically-manufactured, multi-use rockets, which are capable of rapid repair, in 2025 and 2026.

Space Industry. The PRC's space industry, managed by the PLA, is rapidly expanding its intelligence, surveillance, reconnaissance, navigation, and communication satellite constellations. The successful completion of the Tiangong Space Station in 2022 and its planned expansion demonstrates the industry's continued progress. The PRC's domestic space market is dominated by state-run enterprises; however, increased investment has enabled private space companies to successfully launch orbital satellites in the past 4 years. In 2020, The PRC launched its first satellites for an ongoing new space-based internet-of-things project with container monitoring and maritime communications applications and, in 2021, designated satellite internet a national infrastructure project.

Global and domestic economic, technological, and national security goals drive PRC aspirations to invest in the space industry. Through 2030, the PRC will continue to leverage its nonmilitary and commercial space activities to expand its global influence. Beijing's policies to encourage private investment in space activities have influenced a broad range of firms to enter the commercial space market. However, SOEs and their subsidiaries remain the primary players in the PRC commercial space sector, which includes R&D spinoffs, established companies, and a growing number of startups. The PRC's civil-commercial space sector is being relied on for technical innovation and expanding emerging technology industries that support its national security objectives.

Naval and Shipbuilding Industry. The PRC, the top commercial ship-producing nation in the world by most industry measures, has sufficient capacity to produce any required numbers of naval classes: submarines, surface combatants, and auxiliary and amphibious ships. The PRC has developed unmanned underwater systems, publicly revealing a long-range system in 2019. The PRC has been constructing major new shipyards, such as Hudong Shipyard on Changxing Island, in recent years to replace smaller and older yards in support of its commercial and naval shipbuilding programs, which seek to increase shipbuilding output. The PRC domestically produces naval gas turbine and diesel engines (under license from foreign companies or via domestic development) as well as almost all shipboard weapons and electronic systems for its military shipbuilding sector, making the industry nearly self-sufficient for all shipbuilding needs.

In 2022, the PRC launched its first domestically designed and manufactured aircraft carrier, *Fujian,* featuring an electromagnetic launch system (EMALS) and other updates compared to its earlier carriers. The carrier will be able to deploy up to 40 fixed-wing aircraft, including J-15

fighters and a new AEW aircraft as well as several helicopters, including the and Z-9C, Z-20, and Z-18.

Armaments Industry. The PRC's production capacity is improving all PLA ground system categories: main and light battle tanks, armored personnel carriers, assault vehicles, air defense artillery systems, and artillery systems. Notably, the PRC began testing unmanned Type 59 tanks in 2018 as part of its military modernization program. In November 2022, the PRC unveiled an unmanned model of its VT-5 light tank, which is an export variant of the Type-15 light tank. The Type-15 entered PLA service in 2018 and was meant to replace aging Type-62 light tanks that first entered service in 1962. The PRC can produce ground weapon systems at or near world-class standards, although customers cite persistent quality deficiencies with some exported equipment, which could inhibit the PRC's ability to expand its export markets in certain regions.

Aviation Industry. The PRC is advancing its domestic aviation industry through two major state-owned aircraft corporations, the China Aviation Industry Corporation (AVIC) and the Commercial Aircraft Corporation of China (COMAC). AVIC designs and produces the PRC's military aircraft, including the J-20 fifth-generation fighter, the Y-20 heavy transport, and the future H-20 flying wing stealth bomber. In February 2024, AVIC displayed its Z-10 attack helicopter for the first time outside of the PRC at the Singapore Airshow. As of February, Pakistan is the sole known export customer for the helicopter. COMAC produces large passenger aircraft and has begun to export the ARJ21 regional jet to Indonesia, in line with its efforts to expand into the international commercial airliner market. COMAC has delivered its first narrow-body C919 airliner to China Eastern Airlines but cooperation with Russia on the wide-body CR929 may be stalled because of the effects of Western sanctions on Russia. In early 2024, a model of the J-35 stealth fighter appeared on the deck of the PRC's first aircraft carrier, the *Liaoning*—a test bed for PLA carrier capabilities. Although the J-35 is in the development and prototype phase, it could be in operation in the coming years.

The PRC's decades-long effort to improve domestic aircraft engine production is starting to produce results, with the J-10 and J-20 fighters beginning to switch to domestically produced WS-10 engines, although some Russian AL-31F engines may remain in use. As early as 2023, Chengdu Aircraft Industry Group began increasing the production capacity of the J-20 as it is building a new assembly plant to prepare for the subsequent further expansion of production. The PRC's first domestically produced high-bypass turbofan, the WS-20, has entered flight-testing on the Y-20 heavy transport aircraft and probably has begun to replace previously imported Russian engines. UAV development has proceeded rapidly with new flight tests of experimental craft, such as the Y-5U transport UAV. The PRC's military aviation industry has continued to export UAVs abroad, including its sale of nine armed drones to the Democratic Republic of Congo in 2023.

INVESTMENTS IN CHOKEPOINT TECHNOLOGY WITH DUAL-USE POTENTIAL

The PRC seeks to be an innovation superpower largely non-reliant on foreign technology as well as a global center for high-tech industries. The goal of attaining self-sufficiency in key S&T sectors—a theme of PRC state plans going back decades—was recently reiterated in the 14th FYP.

As part of this self-sufficiency drive, Beijing has mobilized its bureaucracies to rapidly develop the country's capacity for domestic innovation.

The PRC is particularly focused on dominating a range of emerging, dual-use technologies that promise to be disruptive and foundational for future economies. In its 14th FYP, the PRC prioritized the advancement of next-generation AI, quantum information, brain science and biotechnology, semiconductors, and deep space, deep sea, and polar-related technologies. Beijing has a clear understanding of its remaining S&T deficiencies and wields industrial policies and the country's massive tech transfer apparatus to close these gaps. The PRC sustains high levels of R&D funding and offers significant subsidies to domestic companies working on frontier technologies.

The PRC aims to overtake the West in AI R&D by 2025 to become the world leader in AI by 2030. The PRC has designated AI as a priority, national-level S&T development area and assesses that advances in AI and autonomy are central to *intelligentized warfare*, the PRC's concept of future warfare. Beijing views the integration of military and civilian institutions as central for developing AI-enabled military capabilities and has established military-civilian R&D centers and procured commercially-developed AI and robotic technologies to ensure PLA access to cutting-edge AI technologies. PRC researchers are world leaders in certain AI applications, such as facial recognition and natural language processing, and PRC companies are marketing domestically-designed AI chips. While the PRC remains reliant on certain foreign capabilities to produce AI hardware, such as advanced semiconductor fabrication tools and software, PRC researchers continue to explore new materials and design concepts for next-generation semiconductors.

In 2021, Beijing funded the China Brain Plan, a major research project aimed at using brain science to develop new biotechnology and AI applications. That year, the PRC designed and fabricated a quantum computer capable of outperforming a classical high-performance computer for a specific problem. The PRC was domestically developing specialized refrigerators needed for quantum computing research in an effort to end reliance on international components. In 2017, the PRC spent over $1 billion on a national quantum lab which will become the world's largest quantum research facility when completed.

FOREIGN ARMS ACQUISITIONS

The PRC uses foreign suppliers to overcome limitations in its domestic production capabilities, particularly with helicopters and aircraft engines. Only a few states have been willing to supply military materiel to the PRC, such as Russia, Ukraine, and France. As its aerospace industry improves over the next decade, the PRC very likely will decrease its foreign acquisitions to a point of maintaining only an import relationship with foreign suppliers positioned to quickly fill niche gaps in the PRC's inventory.

Helicopters. In 2019, the PRC signed four contracts with Russia worth a total of $1.7 billion for 100 Mi-171 helicopters. Russia began producing helicopters for these contracts in 2020 and Beijing expects at least one of the orders to be completed in 2022. As of 2021, the PRC sought at least 36 Russian Ka-52K ship-borne heavy attack helicopters to operate from Type 075 LHAs while it develops a domestic alternative.

Aircraft Engines. The PRC has a longstanding reliance on Russian- and Ukrainian-built engines for fixed and rotary wing aircraft produced domestically. The PRC is developing new engine designs to lessen its reliance on foreign engines, such as the WS-15 to replace Ukrainian AI-222 engines that power its L-15 trainer aircraft. Russia's war on Ukraine probably will impede the PRC's ability to acquire military equipment and maintenance services from either country.

PRC ARMS EXPORTS

As of 2023, the PRC is the fourth-largest arms supplier in the world and sells nearly every category of conventional military equipment, including UAVs, MANPADS, submarines, naval surface vessels, SAM systems, and fighter aircraft to customers worldwide.

Many developing countries buy PRC weapons systems because they are less expensive than other comparable systems. Although some potential customers consider arms made by the PRC to be of lower quality and reliability, many of the PRC's systems are offered with enticements, such as donations and flexible payment options, which make them appealing options for buyers.

The PRC's arms sales operate primarily through state-run export organizations, such as AVIC and North Industries Corporation. Arms transfers are a component of the PRC's foreign policy, used in conjunction with other types of assistance to complement foreign policy initiatives undertaken as part of the PRC's BRI.

Fixed-Wing Aircraft. The PRC offers three combat aircraft for export: the FC-31 fifth-generation multirole combat aircraft, the JF-17 light combat aircraft, and the J-10 multirole combat aircraft. As of early 2024, the PRC had not sold any FC-31s and had sold J-10s only to Pakistan. The PRC co-produces the JF-17 with Pakistan, which has been sold to Burma, Iraq, and Nigeria. The PRC has supplied strike-capable Caihong and Wing Loong UAVs to several countries, including Algeria, Pakistan, Egypt, Indonesia, Iraq, Jordan, Kazakhstan, Saudi Arabia, Serbia, and the UAE.

Precision-Strike Weapons. As of 2021, the PRC had exported ballistic missile systems, including the M20, BP-12, and Joint Attack Rocket and Missile System (JARM), as well as long-range satellite-guided rocket systems. Although the PRC typically does not disclose the countries purchasing these types of arms, in 2021, Burma displayed an SY-400 TEL in 2021 and Qatar displayed a JARM in 2017.

Air Defense Systems. In April 2022, Beijing made its first delivery of a SAM system to a European nation, Serbia. The FK-3, an export-variant of the HQ-22, fires missiles that can reach Mach 6 and range 100 km.

Naval Combatants. The PRC is a supplier of major naval vessels, highlighted by Pakistan's 2015 purchase of eight YUAN class submarines for more than $3 billion. Thailand purchased one YUAN class submarine in 2017. In 2024, the PRC accepted Thailand's proposal to purchase two offshore patrol vessels or one frigate. As of April 2024, the PRC had not delivered any Yuan submarines, although it had delivered two MING class submarines to Bangladesh in 2016 and one to Burma in 2021. In 2017 and 2018, the PRC sold two frigates to Bangladesh and four to Pakistan, respectively. In September 2019, the PRC made its first-ever sale of a landing platform dock ship to Thailand. In April 2023, Thailand received a new frigate to serve as a submarine tender.

ESPIONAGE ACTIVITIES SUPPORTING MILITARY MODERNIZATION

There have been multiple U.S. criminal indictments since 2015 involving espionage by PRC nationals, U.S. lawful permanent residents from the PRC, and U.S. citizens, specifically U.S. service members. These incidents include procuring and exporting controlled items to the PRC and economic espionage, according to a U.S. Department of Justice summary of major U.S. export enforcement. The PRC's efforts to acquire sensitive, dual-use, or military-grade equipment included aviation technologies, radiation-hardened power amplifiers and supervisory circuits, radiation-hardened integrated circuits, monolithic microwave integrated circuits, accelerometers, gyroscopes, naval and marine technologies, signals decoders, syntactic foam trade secrets, space communications, military communication jamming equipment, and dynamic random access memory. Cases from 2023 and early 2024 include the following:

- In October 2023, a former identified U.S. service member was arrested for attempting to deliver national defense information to PRC security services, including a device that would enable access to U.S. secure military computer networks. In August 2023, two U.S. service members were arrested for transmitting sensitive military information to the PRC, including information on sensitive weapons, propulsion, and desalination systems of naval warships.

- In March 2024, a U.S. Army intelligence analyst was arrested for transmitting sensitive documents pertaining to the tactics, techniques, and procedures manuals for the HH-60W helicopter, the F-22-A Raptor, ICBMs, and the HIMARS system. The analyst provided information on U.S. military exercises, studies on major countries including the PRC, hypersonic equipment, and the United States' potential plans during a Taiwan contingency.

- In March 2024, a PRC national residing in California and working for Google was arrested for the theft and transition of AI-related trade secrets and providing them to PRC-based companies in the AI industry.

The PRC presents a sophisticated, persistent cyber-enabled espionage and attack threat to military and critical infrastructure systems through its efforts to develop, acquire, or gain access to information and advanced technologies. Detected PRC cyberspace operations have targeted telecommunications firms, managed service providers, and software developers. Key U.S. targets include proprietary commercial and military technology companies and research institutions associated with defense, energy, and other sectors.

The PRC seeks to create disruptive and destructive effects—from denial-of-service attacks to physical disruptions of critical infrastructure—to shape decision-making and disrupt military operations at the initial stages and throughout a conflict. The PRC's activities in cyberspace constitute a fundamentally different, more complex, and more urgent challenge to the United States national security today than they did a decade ago.

PRC TALENT RECRUITMENT PROGRAMS AND GOVERNMENT SCHOLARSHIP ORGANIZATIONS

Since the 1980s, the CCP has emphasized the need for talent recruitment and expanded talent recruitment activities while treating recruitment as a form of technology transfer. Talent recruitment efforts cover a spectrum of activity, from legal and overt activity to illegal and covert work to acquire dual-use technologies through theft and espionage. PRC talent programs are administered at multiple levels of the PRC government, including the national, sub-national, provincial, city, and university level. PRC universities leverage or administer talent programs that support or receive funding to support PLA modernization efforts. In 2018, prompted by U.S. investigations, the PRC government began removing direct references to talent recruitment programs, including removing information from the internet and ordering organizations to use more covert methods of recruitment. As of 2024, the PRC government continues to maintain and leverage numerous talent recruitment programs beyond the "Thousand Talent Program."

The Chinese Scholarship Council (CSC), a PRC government-backed nonprofit organization, awards scholarships to PRC national students if the applicant's research meets Beijing's objectives and compels scholarship recipients to acquire advanced technologies, some of which have military applications. The CSC expects its funded students, some of whom have been active-duty members of the PLA, to be loyal to the CCP and return to the PRC after their education. All CSC-funded students are expected to acknowledge their legal obligation to report to higher authorities on matters relating to PRC state S&T. Some CSC-funded students have openly stated their intent to use collected technologies and proprietary knowledge to benefit PRC institutions.

CSC recipients are required to report to the nearest PRC embassy or consulate shortly after they arrive in the country they are studying in and to periodically submit reports on their own research. The CSC maintains strict contractual requirements among scholarship recipients that each student and researcher must sign; failure to comply with the terms may result in legal action against the awardee and the cosigners by the PRC government.

The CSC runs an online career platform to recruit PRC national students and scholars for institutions affiliated with Beijing's military-industrial complex, advancing its military-civilian fusion strategy. The CSC's platform has previously hosted advertisements for the PRC's premier nuclear weapons facility and the Seven Sons of National Defense (Seven Sons). The Seven Sons are a group of leading PRC universities affiliated with the PLA and PRC defense industry. In addition, the CSC has sought to recruit overseas PRC national student and scholars for institutions affiliated with weapons science and aeronautics.

In 2020, an active-duty PLA military officer funded by the CSC identified that their military supervisor had instructed them to examine a U.S. laboratory layout and provide technical details to the PRC for replication. The individual admitted to illicitly keeping sensitive research without approval from their university of study and stated they intended to bring the research back to the PRC to share with their PLA colleagues.

As of 2023, Dutch and Swedish universities started rejecting CSC-funded students and have ceased collaborative relationships with the CSC.

CHAPTER SIX: DEFENSE CONTACTS AND EXCHANGES IN 2023

Key Takeaways

- In 2023, the PLA largely denied, cancelled, and ignored recurring bilateral engagements and DoD requests for communication until weeks before President Biden and PRC leader Xi Jinping met in November 2023.
- Following the leaders' meeting at Woodside, DoD and the PLA conducted several working-level and senior-level exchanges at the end of 2023 and into 2024.
- These meetings included senior leader discussions, defense policy talks, operational safety talks, and conversations between theater commanders.
- The PRC's decision in November 2023 to resume military-to-military communications underscores the way in which the PRC views having defense and military engagements—or not—as a political and signaling tool.
- DoD remains committed to maintaining open lines of communication with the PRC to ensure competition does not veer into conflict.
- DoD's objectives in maintaining military-to-military communications are to prevent crisis, reduce strategic and operational risk, and clarify misperceptions.
- DoD contacts and exchanges with the PRC are conducted in accordance with the statutory limitations of the National Defense Authorization Act for the Fiscal Year 2020, as amended.

STRATEGIC CONTEXT FOR THE U.S.-PRC DEFENSE RELATIONSHIP

Beginning in the early 2000s, the United States approached defense engagement with the PRC as a means of enhancing PLA transparency, advancing mutual reciprocity, and imparting best practices for air and maritime operational safety. These activities sought to encourage the PRC to play a constructive and peaceful role in a free and open international system.

Despite U.S. and international efforts to encourage the PRC's rise to occur within the rules-based international order, PRC malign behavior has subsequently cast doubt on its willingness to operate in accordance with international laws, rules, and norms. As the PLA modernizes toward its goal of producing a world-class force by 2049, the PRC has increasingly turned to the PLA as an

instrument of statecraft to advance its foreign policy objectives—adopting more coercive and aggressive actions in the Indo-Pacific region.

As the PLA expands its operations regionally and globally, the likelihood of U.S. and PRC forces operating in close proximity increases, along with the potential for increased tension. Despite the November 2023 resumption of defense engagement, it is unclear if the PRC shares the U.S. commitment to open lines of military-to-military communications, even in times of high tension. The PRC's record of cancelling defense and military engagements in response to perceived offenses or heightened tensions suggests the PRC views defense and military engagements as a tool to punish or reward the United States for its perceived behavior versus being inherently valuable to maintaining peace and stability.

High-Level Contacts and Exchanges. High-level exchanges between the U.S. and PRC—such as between the U.S. Secretary of Defense and the PRC Minister of National Defense—are an important way to exchange authoritative official views on the bilateral defense relationship and the international security environment.

Defense Engagements in 2023

Executed: The Chairman of the Joint Chiefs of Staff held one defense telephone link (DTL) video call with the PRC head of the Joint Staff Department in December 2023 to discuss operational safety along with regional and functional issues.

Refused, cancelled, or ignored: For most of 2023, the PLA declined, cancelled, or ignored senior-level contact requests. The PRC declined two Secretary of Defense DTL call requests to General Wei Fenghe in the first half of 2023. The PRC refused Secretary of Defense proposals to engage with then-CMC member and PRC Minister of National Defense General Li Shangfu due to PRC objections to U.S. sanctions on General Li. General Li was removed from his position in October 2023, likely due to corruption. In 2023, the PRC ignored INDOPACOM Commander DTL call requests to the PLA STC, NTC, and ETC commanders.

Recurring Exchanges. Recurring exchanges serve as regularized mechanisms for dialogue to advance priorities for defense policy, crisis prevention and management, and operational safety.

Executed: None.

Refused, cancelled, or ignored: Before the resumption of defense engagement following the leaders' meeting in November 2023, the PLA declined to hold routine events, such as the Defense Policy Coordination Talks and Military Maritime Consultative Agreement.

Confidence-Building Measures and Academic Exchanges. DoD views CBMs as venues to reduce risks of misunderstanding or misperceptions, brief significant policy documents, carry out POW/MIA accounting, and promote international rules and norms. Relatedly, DoD views military and defense academic exchanges as an opportunity to build mutual understanding and reduce misperceptions.

Executed: In August 2023, DoD briefed the PRC defense attaché and Office of International Military Cooperation (OIMC) on the unclassified DoD Cyber Strategy Summary, per the 2014

U.S.-PRC Memorandum of Understanding on Notification on Major Military Activities Confidence Building Measure Mechanism. While attending the Beijing Xiangshan Defense Forum in October 2023 at the invitation of the PLA, DoD briefed the PLA Academy of Military Sciences in Beijing on the 2023 annual report, *Military and Security Developments Involving the PRC*, to share DoD assessments of PRC security developments and discuss areas of possible misperception. This briefing was provided pursuant to the 2014 Memorandum of Understanding.

Defense Engagements to Date in 2024

High-Level Contacts and Exchanges. In 2024, the Secretary of Defense engaged with PRC Minister of National Defense Admiral Dong Jun two times to discuss regional security, bilateral defense relations, and issues of common concern. They conducted one DTL video call in April 2024 and met once in May 2024 on the sidelines of the Shangri La Dialogue in Singapore. In May 2024, OSD Policy Indo-Pacific Security Affairs Assistant Secretary of Defense Ely Ratner held a DTL video call with CMC OIMC Director MG Li Bin to discuss the bilateral defense relationship and regional issues. In September 2024, INDOPACOM Commander Admiral Samuel Paparo held a DTL video call with PLA STC Commander General Wu Yanan. Later that month, General Wu attended the Chiefs of Defense Conference, which Admiral Paparo hosted.

Recurring Exchanges. After President Biden met with Chairman Xi at Woodside in November 2023, DoD and the PLA resumed their formerly routine defense engagements that had largely been dormant since 2020 or earlier. In January 2024, DASD China, Taiwan, and Mongolia Michael Chase hosted then-CMC OIMC Deputy Director Major General Song Yanchao for a round of Defense Policy Coordination Talks. In April 2024, working-level delegations from INDOPACOM and the PLA executed a successful working group of the Military Maritime Consultative Agreement, an operational safety dialogue.

Confidence Building-Measures and Academic Exchanges. In January 2024, a Defense POW/MIA Accounting Agency team conducted site surveys in the PRC to locate U.S. service members missing in action from World War II. DoD and OIMC held an inaugural Terms and Translations Working Group in June 2024 focused on increasing mutual understanding of key terms and phrases used in the context of bilateral defense and security issues. Also in late June 2024, PLA NU visited the DoD NDU for a research exchange on bilateral, global, and functional issues of mutual concern.

SPECIAL TOPIC: IMPACTS OF CORRUPTION ON THE PLA

In 2023, the PLA experienced a new wave of corruption-related investigations and removals of senior leaders which may have disrupted its progress toward stated 2027 modernization goals. Between July and December 2023, at least 15 high-ranking military officers and defense industry executives were removed from their posts. Several leaders investigated or removed for corruption oversaw equipment development projects related to modernizing the PRC's ground-based nuclear and conventional missiles.

In late October, Beijing officially removed then-PRC Minister of National Defense Li Shangfu from his post. Li had previously led the CMC's EDD from 2017 to 2022, where he would have signed off on all of the PLA's weapons acquisitions. Li's ouster followed the removal of several PLARF leaders last July, including then-PLARF Commander Li Yuchao, PLARF Political Commissar Xu Zhongbo, and several deputy commanders. The wholesale dismissal of senior PLARF leadership may be connected to fraud cases involving the construction of underground silos for ballistic missiles during a period of rapid expansion for the PLARF and the PRC's missile industry. The impact on PRC leaders' confidence in the PLA after discovering corruption on this scale is probably elevated by the PLARF's uniquely important nuclear mission. This investigation likely resulted in the PLARF repairing the silos, which would have increased the overall operational readiness of its silo-based force.

At least five PRC defense industry leaders, including the head of the PRC's largest missile manufacturer, have been detained for investigation by the Central Commission for Discipline Inspection, the CCP's top corruption watchdog, likely for engaging in bribery and graft with PLA officers during the acquisition process. In December, nine officials—primarily PLARF and CMC EDD leaders as well as defense industry leaders—were removed from the NPC, the PRC's national legislature, presumably because of their connections to corruption. In late July 2023, the PLA made a rare announcement, launching a wide-ranging investigation into weapon procurement programs dating back to 2017, signaling significant concerns with the PLA's modernization efforts more broadly.

The extent of the current wave of corruption cases, touching every service in the PLA, may have shaken Beijing's confidence in high-ranking PLA officials because rooting out corruption in the military had been a major focus for Xi since he became CMC chairman in 2012. PRC leaders probably view the CCP's decade-long campaign as a necessary tool to build a professional fighting force as part of the PLA's 2027 modernization goals. In March 2024, CMC Vice Chairman He Weidong told a PLA delegation at the PRC's annual legislative gathering that the CMC would crack down on "fake combat capabilities" in the military, which may refer to weapons procurement-related corruption.

In July 2023, Beijing appointed a PLAN deputy commander as the PLARF's new commander and a PLAAF officer as the new political commissar. The decision to select officers from outside the PLARF to lead the service probably signals Xi's distrust in PLARF senior leaders to instill discipline in the ranks. Xi ordered the PLA's top leaders to renew efforts to eliminate corruption and enhance CCP leadership over the PLA. Xi and other CMC members probably will increase scrutiny of PLA capabilities testing and political loyalty in the force.

SPECIAL TOPIC: POLITICAL TRAINING IN THE PLA

The political work system and the political training featured in it have been central parts of the PLA since its founding as the party army of the CCP. A key feature of Xi Jinping's leadership has been its focus on strengthening and revitalizing political work and training in the PLA to enable the PLA to "fight and win" wars and to bolster political control over the military. Efforts to revitalize political work derive from the Xi's concerns regarding political loyalty and corruption in the armed forces. At the 2014 All-PLA Political Work Conference in Gutian, which was intended to evoke the 1929 Gutian Congress that cemented party rule over the PLA, Xi called for enhancing party control of the PLA, strict management of cadres and officers, and innovating political work to keep up with a rapidly changing world.

Political work in the PLA includes leading the work of the CCP in the armed services, managing personnel and welfare, overseeing promotions and assignments, handling public relations, supervising individual and unit political training, and undermining opposing forces in wartime. The CCP extends control of the PLA at every level of command through the military and political dual-command structure, by which each PLA unit at or above the regimental command is headed by a military commander and political commissar. The military commander and political commissar are considered equals and share joint leadership over the unit in issuing orders and daily tasks. While the party committee makes decisions on major issues, the military commander is usually responsible for daily decisions on military and operational matters, whereas the political commissar is typically responsible for the unit's political work and personnel decisions. The PLA uses three central systems to conduct political work in the military—the political officer system, party committee system, and political organization system.

Political Officer System

Political officers have existed in the PRC military since 1929 and continue to play an important role in the political work of the PLA. Political officers function at every echelon in the military and implement party policies, directives, and regulations; lead ideological and political education; oversee public relations with the nearby population; and manage the discipline, morale, and welfare of PLA personnel. Political officers are slotted in the political career track and enroll in political education courses at academies or the Central Party School at the mid-career and senior-levels. There are three levels of political officers:

- **Political Commissars**: Assigned at the level of regiment and above; lead party committees with subordinate party organizations.

- **Political Directors/Instructors**: Assigned to all battalion-level organizations; lead grassroots party committees. Some PLA analysts translate the term for political officers at

the battalion and company level as "political instructor" while others use "political director." The functions of the officers at the two levels are the same.

- **Political Instructors**: Assigned to all party level organizations; lead party branches.

During wartime, political officers are responsible for rallying troops, supporting the military commander in operations, and, depending on their level, maintaining order. Political officers are also responsible for the execution of the "three warfares" doctrine—public opinion, legal warfare, and psychological warfare. The roles and responsibilities of political commissars vary across different branches and levels of the military. Most political commissars are trained officers and often possess operational experience.

Party Committee System

The party committee is a key decision-making institution in the PLA and a fundamental mechanism by which the CCP maintains control over the PLA. PLA unit leadership typically includes the unit commander, political commissar, head of the unit's political work department, and other individuals assigned party positions based on their assignment within the unit. The political commissar usually serves as the party committee secretary and military commander usually serves as deputy secretary, although it can vary by seniority, personality, and competence. Party committees are responsible for making overall decisions on planning and training, officer evaluations and promotions, expenditure of funds, and personnel management. Full party committees are featured at the regiment level and above. Battalion-level organizations have grassroots party committees. Company-level organizations have party branches overseen by party branch committees. Each platoon and squad-level organization forms a party cell.

POLITICAL TRAINING IN THE PLA

Organizational Level	Political Officer	Party Organization
Central Military Commission Theater Command Army/Corps Division Brigade Regiment	Political Commissar	Party Committee
Battalion	Political Directors/ Political Instructors	Grassroots Party Committee
Company	Political Instructor	Party Branch
Platoon	No Political Officer	Party Small Group

Political Organization System

The political organization system is the third of the three primary systems for political work in the PLA. Although the party committee system, with its leadership and decision-making functions, is at the center of the CCP's control of the military, each unit with a full party committee has a

political work department and additional subordinate elements, such as a political and legal affairs commission and a discipline inspection commission, each with political cadres who serve as the implementers and caretakers of the CCP's control of the military under the political organization system. The political organization system plays a key role in coordinating within and outside of the armed forces. The system, along with party committees at all levels, plays an important role in transmitting and implementing the decisions and plans for the CCP Central Committee and CMC throughout the PLA.

Political Training

A key component of the political work system is the political training it manages across the PLA. During the 20th Party Congress in October 2022, President Xi Jinping emphasized the advancement of political training as part of the PLA's anti-corruption campaign and promotion of the party's absolute control over the military. The CCP views ideological education as fundamental to maintain the PLA's loyalty and prevent ideological differences that could weaken the PLA's commitment to the party. Political work and training are important not only for monitoring PLA personnel for ideological faults but for resolving them, when possible. Political officers are responsible for political and ideological training throughout the PLA to reinforce the CCP line, maintain correct political values, and rectify ideological failures among personnel. They lead units in a range of political work and training activities for PLA personnel, including political classes and routine instruction, demonstrations, reading and study groups, and discussion meetings. Political work organs are responsible for overall political work in their organizations, including educating CCP members, inspecting grassroots units, overseeing officers' education and training, creating lessons plans, and disseminating political and media content to personnel. Political training and education are significant components of the education of PLA officers across branches in addition to military training.

SPECIAL TOPIC: PRC VIEWS OF COMPREHENSIVE NATIONAL POWER

For Beijing, "comprehensive national power" (CNP) is a concept representing a country's overall measure of power actualized across multiple domains that it wields in the international system. More than just military strength, it encompasses a country's full suite of economic, S&T, diplomatic, political, cultural, natural, people, and other resources as well as ideational ethos and international influence. The term dates to at least the 1960s but, in the 1980s, as the PRC developed Deng Xiaoping Theory, it adopted CNP as a measuring tool for the PRC's overall development. The term CNP remains broadly used by PRC officials, strategists, and theorists today. CNP is used as an internal measurement of development and a calibrated reference for competition between inimical governance systems—the PRC's socialist system and the West's capitalist system. CNP is inexorably tied to military competition as, for the PRC, confrontation on the battlefield represents not just a contest between two countries' military systems but a systemic confrontation based on the overall strength of each country.

Xi Jinping made clear at the 20th Party Congress that CNP measures the PRC's progress toward its 2035 and 2049 national goals. By 2035, the PRC must "significantly increase economic strength, scientific and technological capabilities, and comprehensive national power." By 2049,

the PRC must become a "great modern socialist country that leads the world in terms of comprehensive national power and international influence." PRC theorists have developed various mathematical formulas meant to empirically assess the variables that compose CNP. Despite the pretense of empiricism, there is no authoritative single formula for calculating CNP among PRC theorists or strategists.

In general, the PRC perceives that its CNP growth is accelerated while that of the United States is decelerating. This constitutes a "revolutionary change" in the international balance of power. Beijing views the acceleration of strategic competition between the United States and the PRC as an intrinsically linked phenomenon. PRC theorists emphasize that the PRC must simultaneously grow all aspects of CNP to "lay a solid material foundation" for the PRC's development. As it applies to the balance between military and non-military strengths, they champion simultaneous growth, going beyond finding an adequate balance of resource allocation between the two to perfecting a systemic approach where investments in national defense create follow-on economic development and vice versa.

Increasingly, PRC planning documents and strategic discourse has tied perfecting the PRC's INSS&C with the advancement and ultimate application of CNP. For example, the PRC's Outline of its 14th FYP specified that the PRC would promote the simultaneous increase of national defense and economic strength in part by building the INSS&C. Broadly, the INSS&C encompasses to the PRC's top-level planning institutions and processes across its national development and its national defense-related government agencies—the ultimate aim of which is to solidify a national-level system that drives efficient, mutually beneficial growth of the key elements of CNP.

PRC commentary suggests that the PRC's path for perfecting the INSS&C includes strengthening military-civilian strategic planning, linking policy systems and resource sharing between national development and national security domains, and coordinating in key areas, such as infrastructure construction, technological industry development, personnel training, and investments in emerging technology domains. Overall, PRC discussions of developing the INSS&C and growing the PRC's CNP are tinged with concern about preparing for enduring strategic competition and an unpredictable international environment while ensuring the PRC's own rise.

APPENDIX I: TAIWAN STRAIT MILITARY BALANCE

Methodology: Only equipment, aircraft, and ships considered operational are included in the following charts although all these equipment, aircraft, or ships may not yet be assigned to a specific theater. The total column refers to all equipment, aircraft, or ships, assigned and unassigned.

Note: For this document, the "Taiwan Strait Area" includes the PLA's Eastern and Southern Theaters.

PROPOSED PRC GROUND ORDER OF BATTLE

TAIWAN STRAIT MILITARY BALANCE, GROUND FORCES			
	PRC		Taiwan
	Total	Taiwan Strait Area	Total
Total Ground Force Personnel	1,040,000	427,000	104,000
Group Armies/Army Corps	13	5	3
Combined Arms Brigades	80	30	7
Artillery Brigades	15	5	3
Army Aviation Brigades	13	4	2
Air Assault Brigades	3	1	0
Airborne Brigades	6	6	0
Marine Brigades	11	5	2
Tanks	3,800	1,000	800
Artillery Pieces	7,600	2,300	1,100

TAIWAN STRAIT MILITARY BALANCE, NAVAL FORCES			
	PRC		Taiwan
	Total	Eastern and Southern Theater Command Navies	Total
Aircraft Carriers	3	1	0
Amphibious Assault Ships	3	3	1
Cruisers	8	4	0
Destroyers	42	30	4
Frigates	49	36	22
Corvettes	50	40	0
Medium Landing Ships/ Tank Landing Ships/Amphibious Transport Dock	58	51	51
Attack Submarines	47	31	4
Nuclear-Powered Attack Submarines	6	2	0
Nuclear-Powered Ballistic Missile Submarines	6	6	0
Coastal Patrol (Missile)	60	60	43
Coast Guard Ships	141	N/A	170

Note: The PLAN has the largest force of principal combatants, submarines, and amphibious warfare ships in Asia. In the event of a major Taiwan conflict, the Eastern and Southern Theater Navies would participate in direct action against the Taiwan Navy. The Northern Theater Navy (not shown) would be responsible primarily for protecting the sea approaches to the PRC but could provide mission-critical assets to support other fleets. In conflict, the PRC may employ CCG and CMM ships to support military operations.

PROPOSED PRC AIR ORDER OF BATTLE

TAIWAN STRAIT MILITARY BALANCE, AIR FORCES			
	PRC		Taiwan
	Total	Eastern and Southern Theater	Total
Fighters	1,900 (3,100*)	800 (950*)	350 (400*)
Bombers/Attack	500	300	0
Transport	500	40	50
Special Mission Aircraft	250	150	20

Note: This chart displays estimated totals of military aircraft from PLAAF and PLAN Aviation. However, the PLAAF may supplement its military transports with civilian aircraft in a combat scenario.

* The totals in parentheses include fighter trainers.

PRC MISSILE ORDER OF BATTLE

PLA ROCKET FORCE				
Class	**System**	**Launchers**	**Missiles**	**Estimated Range**
ICBM	CSS-3	500	400	>5,500 km
	CSS-4 Mod 2			
	CSS-4 Mod 3			
	CSS-4 Mod 4			
	CSS-10 Mod 1			
	CSS-10 Mod 2			
	CSS-10 Mod 3			
	CSS-20			
	Other			
	Silo			
IRBM	CSS-18 Mod 1	250	500	3,000 km–5,500 km
	CSS-18 Mod 2			
	CSS-18 Mod 3			
MRBM	CSS-5 Mod 2	300	1,300	1,000 km–3,000 km
	CSS-5 Mod 4A			
	CSS-5 Mod 5A			
	CSS-5 Mod 5B			
	CSS-11 Mod 2			
	CSS-11 Mod 3			
	CSS-22			
SRBM	CSS-6 Mod 3	300	900	300 km–1,000 km
	CSS-7 Mod 1			
	CSS-7 Mod 2			
	CSS-11 Mod 1			
GLCM	CJ-10	150	400	>1,500 km
	CJ-10A			
	CH-SSC-13			


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