The Use of Hybrid Warfare to Achieve Strategic Objectives:

Comparing Russian and Chinese Approaches

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ABSTRACT

The past few decades have seen the emergence of the concept of *hybrid warfare*. This term gained special attention after the Russian invasion of Crimea. Since then, Russia and China have been criticised for the use of such methods. To this day, the concept is still debated in the academic world.

This study examines the use of hybrid methods to achieve strategic objectives by Russia and China. Both countries understand, in their own way, the benefits of using such methods, especially at the regional level, and use them to weaken their rivals and gain strategic advantages. Drawing on a corpus of academic literature, articles, reports, evaluations, and online news, this study shows that Russia and China use hybrid strategies in different ways and for different strategic purposes. Our analysis shows that while Russia uses hybrid tools to incite conflict and justify armed intervention to achieve its goals, China uses them subtly to avoid confrontation and gradually fulfil its objectives.

This thesis concludes that the concept of hybrid warfare depends on the actors using it and that Russia and China have envisioned hybrid models that suit their needs. It also lays the groundwork for future research on the subject in more depth and provides a novel tactical-strategic framework that can be used and studied in other areas related to hybrid warfare.

Keywords: hybrid warfare, Russia, China, strategic objectives, regional conflict, geopolitics

1. Introduction

In recent years, *hybrid warfare* has become an important issue in international relations and military operations. The term has been discussed extensively over the past two decades, particularly during the Israel-Hezbollah conflict in 2006 (Grant, 2008), and gained particular prominence in events such as the 2007 Russian cyberattacks against Estonia, Russian invasion of Ukraine, and Chinese activities in the South and East China Seas (Bachmann & Gunneriusson, 2015; Galeotti, 2014). Frank Hoffman coined the term hybrid war in the 2007 article "Conflict in the 21st Century: The Rise of Hybrid Wars" (Hoffman, 2007). This is generally understood as the blending of conventional military tactics with unconventional means such as information warfare, cyber-attacks, propaganda campaigns, and the use of proxy armies (Hoffman, 2007; Galeotti, 2014; Mansoor 2012; Wither, 2016; McCulloh & Johnson, 2013). This comprehensive approach blurs the distinction between war and peace and challenges traditional concepts of conflict and security. Combining conventional and unconventional warfare thus creates new challenges and lays the foundation for modern warfare. However, the concept of hybrid warfare has also been and remains controversial in military and academic circles (Wither, 2016; Giegerich, 2016; Johnson, 2018a). Two major schools of thought have developed around this theory. On the one hand, some argue that the word 'hybrid' provides a good basis for understanding the complex and dynamic nature of contemporary conflicts. The term thus clarifies a "new way of waging war" (Bachmann & Gunneriusson, 2015: 199). On the other hand, many have criticized the wording as ambiguous and excessive, suggesting that it is just another buzzword for non-traditional military techniques used by weaker forces against larger conventional militaries (Wither, 2016: 67). Although this debate shows a lack of agreement on the issue, we cannot ignore the fact that hybrid threats are the order of the day and that the way war is waged has evolved somewhat.

As noted above, over the past decade, two actors have excelled at using hybrid methods to achieve their strategic and geopolitical goals. This is the case of Russia and China, the two cases on which this research focuses. This is because both countries have demonstrated a good understanding of the potential of hybrid warfare and have strategically exploited its characteristics to achieve their geopolitical goals (Swielande & Vandamme, 2023). China's emergence as a political and economic power, and Russia's forceful actions in its neighbouring countries, have drawn attention to the use of hybrid methods. As we will see in the next section, the literature on the use of hybrid warfare is quite general and often redundant. Furthermore, while there are studies on Russian and Chinese hybrid assets, few have focused specifically on how these countries learn and use them strategically. The increasing relevance of hybrid methods implies that Russia and China are well aware of their advantages. However, it remains unclear what effect these tactics will have on their national strategies. To fully understand the current situation of their hybridisation, it is necessary to obtain a more detailed picture of each other's vision and usage. In this paper, I exploit this gap, to demonstrate that hybrid warfare cannot be holistically applied, but that it is essential to know how it is understood and used by specific actors. This paper builds on the classic literature on the traditional concept of hybrid warfare begun by Hoffman (2007) and focuses on providing an individualised understanding of the concept. With this, then, we can gain useful insight into the different techniques, motives, and implications of hybrid warfare in current international politics by comparing the situations of China and Russia.

This research stems from a simple but essential question: How do Russia and China use hybrid warfare to gain strategic advantages over their rivals and how do they differ in its application? This thesis discusses the term 'hybrid' and analyses how both actors use hybrid methods to gain strategic advantage over their opponents, and how they differ when applied in actual conflicts. Therefore, this study rethinks the term hybrid warfare and sheds some light on Russian and Chinese activities over the past decade. The first objective is to understand the

positions of both countries on war and, in particular, on modern warfare. Second, we want to analyse the use of hybrid threats by both countries to weaken their rivals to achieve their strategic objectives. This will also allow us to study how they think and act. Third, we want to observe, as far as possible, the consequences of their actions in engaging in hybrid warfare. This qualitative study will be based on the analysis of secondary sources such as articles, reports, academic literature, and online news.

This paper argues that the literature around hybrid warfare often overlooks how these methods are used strategically. Moreover, scholars and experts have not delved deeply into how some countries understand hybrid warfare and have instead focused on a holistic definition that is often extrapolated for every case. Therefore, the hypothesis of this study is based on the distinction of the term into two categories, taking Russia and China as an example. This is because both countries maintain fundamental differences in the understanding and conduct of "war" by the two subjects. This paper hypothesises that Russia uses hybrid warfare as a way of waging war. That is, Moscow engages in hybridity to incite conflict, deliberately escalating situations that justify a direct intervention. China, on the other hand, uses it as a way of avoiding direct conflict. Beijing therefore sees hybridness as an ideal tool to gradually advance its goals without turning into conflict. The focus is therefore on the goals, actions, and consequences of the use of hybrid warfare for both actors.

The results of this research have implications for regional and global stability. From this study it is possible to analyse the risks of escalation, the role of traditional armed forces, and especially the use of proxies, as well as the broader implications for international rules and regulations governing conflict. This paper, therefore, aims to contribute to the field of hybrid warfare and to emphasise the shifting nature of conflict and security in the modern world by digging into China and Russia's use of hybrid warfare. It also stresses the need

to study the strategies and approaches of great powers and provides insight into the issues and potentials associated with hybrid warfare in the 21st century.

The chapter following this introduction is a literature review. The literature examined provides an overview of the term hybrid warfare, including its origin, conception, and the debate about its validity. It also introduces us to the cases of Russia and China. After the literature, the next chapter is the research design. This includes the analytical framework and the method used to analyse the relevant cases. This chapter will also introduce readers to the different sub-cases that will be analysed throughout the entire study. Then comes our case analysis. This section is divided into two chapters: the first part deals with Russia and the second part deals with China. The selected sub-cases serve as an analysis of each country's use of hybrid approaches to achieve its goals. Following that, the comparative analysis provides the findings of the research and sheds light on how both countries behave in the field of hybrid warfare. This chapter includes a discussion of the implications of the results and the identified gaps. The final chapter is a concluding section, providing an overview of the study.

2. Literature Review

To study how countries engage in hybrid warfare, we need to establish a comprehensive theoretical framework that achieves three main goals. The first objective is to understand the concept and assess the available hybrid warfare theories. The second goal is to establish a working definition of hybrid warfare. The third goal is to evaluate its advantages and disadvantages.

I begin the literature review with a brief historical background about the term and discuss its origins and development. I then examine the current state of knowledge in the field of hybrid warfare and the implications of the term hybrid for ongoing theoretical discussions. Two distinct schools of thought have emerged: the first sees hybrid warfare as a mix of different tactics and tools, while the second sees it as a "mutation" of traditional warfare. Having established these theoretical debates, I will address the gaps in the literature, and the contributions that this work can make to the field.

2.1. Hybrid Warfare: An Old Concept

The concept of hybrid warfare has a long history, dating back to previous conflicts (Deep, 2015). This approach has been used in various conflicts throughout history, and while the methods employed by both state and non-state actors have changed over time, the basic principles of hybrid warfare remain the same.

2.1.1. Hybrid Warfare without the Hybrid

Many philosophers and theorists have dealt with the relationship between war and governance in the past. Thus, the combination of war and statecraft is not new. War has always been seen as a combination of methods and tools, to gain political advantage.

In his work "The Art of War", Sun Tzu not only pays attention to the battlefield but also emphasised doing war in the shadows. He argued that war is based on

deception. In the final chapter (XIII), Sun Tzu discusses the use of intelligence and espionage, focusing on the importance of creating reliable sources of information and managing them to one's advantage (Tzu, 1910: 1-55). In his work "Arthashastra", the Indian theorist Kauṭilya also emphasises espionage, propaganda and information (Kautilya, 1915: book XIV). Centuries later, in his famous book "On the Theory of War", Carl von Clausewitz refers to war as an instrument of policy, and defines it as "nothing more than the continuation of politics by other means". Clausewitz argues that winning a war requires not only subjugating the enemy militarily but also destroying their will. To exhaust the enemy, it is necessary not only to break physical but also moral resistance, which has direct political consequences (Clausewitz, 1989: 90-99).

In practice, we also see the use of hybrid methods, including irregular warfare. For instance, during the American Revolution, George Washington combined his Continental Army with a militia force to fight against the British. Likewise, during the Napoleonic Wars, French forces were challenged by Spanish guerrillas who attacked their lines of communication. The British Army also employed hybrid tactics during the Arab Revolt, combining conventional operations in Palestine with irregular forces under their operational control (Deep, 2015).

2.1.2. The Origins of the Term Hybrid Warfare

As we have briefly seen, the concept of hybrid warfare is not new and has its roots in history. However, the rise of non-state actors, information technology and advanced weapon systems has given modern hybrid warfare the potential to transform the battlefield, as well as the potential belligerents (Deep, 2015).

The term hybrid warfare is influenced by three terms. The first is Fourth Generation Warfare (4GW), the second is unrestricted warfare, and the third is compound war. In 1980, a group of American analysts, which included William S. Lind, coined 4GW to describe the shift towards a decentralised form of

warfare. Their article "The Changing Face of War: Into the Fourth Generation" argues that the fourth generation of modern warfare represented the decline of nation-state dominance over combat forces and the re-emergence of pre-modern forms of conflict (Lind *et al*, 1989: 22-26). In this type of war, “an actor uses a range of conventional and unconventional means, including terrorism and information, to undermine the will of the existing state, to de-legitimize it, and to stimulate an internal social breakdown” (1989: 22-26). The theory emphasized political will, legitimacy, and culture, while arguing that superior political will can defeat greater economic and military power. However, the concept has been criticized by some historians for its poor use of history and lack of intellectual rigour. They also argued that what is happening is simply part of war's evolution and a return to older cases (Mackenzie Institute, 2009).

Two decades later, in 1999, two People's Liberation Army (PLA) colonels Qiao Liang and Wang Xiangsui conceived the term "Unrestricted Warfare" or “war beyond limits”. The book focuses on how a nation, like China, could triumph over a technologically advanced adversary, such as the United States, using different tactics. They recognised the possible consequences of globalisation and attempted to broaden the definition of war beyond its traditional military realm. Therefore, they explored alternative methods such as political warfare, using legal and economic tools to exert leverage over the adversary and avoid direct military engagement (Liang & Xiansui, 1999). The authors offered new principles for "beyond-limits combined war," that is, “Omnidirectionality, Synchrony, and Asymmetry”. Omni-directionality requires considering all traditional and non-traditional domains as battlefields, whereas Synchrony involves conducting operations in different spaces simultaneously or at designated times. Asymmetry, they defend, presents itself in all aspects of warfare, but in "war beyond limits," there is a broader spectrum for disregarding the conventional laws (Liang & Xiansui, 1999).

Finally, hybrid threats are also associated with the concept of "Compound War" (CW) (AFJ, 2009). The term CW was popularized in 2002 by Thomas Huber's "Compound Wars: That Fatal Knot." CW involves the deliberate use of regular and irregular forces fighting simultaneously under a unified direction. Therefore, the benefit comes from exploiting the strengths of each force while forcing the opposing force to be concentrated and dispersed at the same time (AFJ, 2009). While the irregular forces are used "to attrite the opposing force and support a strategy of exhaustion", the conventional force induces the enemy to concentrate on defense or to achieve critical mass for decisive offensive operations. The forces operate in different theatres or parts of the battle space and do not combine in battle. However, Hoffman argues that the theory of compound wars "did not hold up to its definition" in that it only "identified cases of strategic coordination rather than forces fighting alongside each other" (Hoffman, 2007: 20).

2.1.3. Developing Hybrid Warfare

The modern conception of hybrid warfare dates back to the beginning of the 21st century when military strategists recognised the emergence of a new type of conflict that combined conventional military tactics with irregular tactics (Bilal, 2021). These new tactics include terrorism, insurgency, cyber-attacks, and information operations. However, there is currently no widely accepted definition of the term hybrid warfare and some question whether the term is even useful in the first place.

The term hybrid warfare was first popularized in a 2007 article by Frank Hoffman, a retired US Marine Corps officer and defense analyst. In his article "Conflict in the 21st Century: The Rise of Hybrid Wars," he noted the growing use of the term hybrid threat and examined its various meanings (2007). Hoffman argued in his article that the traditional distinction between conventional and irregular warfare was becoming increasingly blurred and that modern conflicts were distinguished by the simultaneous use of a wide range of

military and non-military tactics (2007: 29). Hoffman first noted this trend during the 2006 confrontation between Hezbollah and Israel. In this conflict, Hezbollah, despite not being a state entity, was able to exploit the vulnerabilities of Western-style forces (Grant, 2008). Years later, the term also gained popularity in the West thanks to the publication of a note by General Gerasimov to counter the West's "Comprehensive Approach" (Johnson, 2018a: 142). Gerasimov defined a framework for hybrid warfare that formally included non-military measures - political, economic, information, and propaganda, as well as covert military action (Minasyan, 2015). This is known as the 'Gerisamov Doctrine', a term coined by Mark Galeotti to describe Russia's 2014 invasion and annexation of Crimea (Galeotti, 2014). Although Galeotti himself later acknowledged that this doctrine had been misinterpreted, many Western commentators believe that the term 'hybrid' was ideal to describe Russia's use of different tools and methods during its annexation of Crimea and its support for separatist groups in eastern Ukraine (Monaghan, 2015: 76). In recent years, China has also been accused of using hybrid tools, although experts noted that China's foreign policy traditionally focuses on economic leverage and 'soft power' diplomacy as its primary means of power projection (Raska, 2015: 1).

The concept of hybrid warfare has been and remains the subject of much debate and discussion within the military and academic communities. Some people consider that the term provides a useful framework for understanding the complex and dynamic nature of modern warfare. On the other hand, some analysts have criticized the term as vague and overly broad, while arguing that it is simply another buzzword for non-traditional military tactics used by weaker forces against stronger conventional military powers (Wither, 2016: 67). Essentially, the term is often used as a catch-all phrase to refer to any type of threat that does not neatly fit into a traditional, linear warfare model. This lack of consensus on the definition of hybrid warfare can lead to confusion and misunderstanding, especially when developing strategies and tactics to counter these types of threats. However, the concept of hybrid warfare is especially

relevant today, with non-state actors and unconventional military tactics becoming increasingly common.

2.2. Framing Hybrid Warfare

According to Wither (2016: 74), there are various definitions of the concept of hybrid warfare, and these definitions have changed in a short time. In the 2000s, the term hybrid gained popularity to describe modern warfare, particularly due to the rising potency and danger of violent non-state actors and the expanding capabilities of cyber warfare (2016: 75).

Starting with Hoffman, it is too simplistic to categorize conflict as solely "Big and Conventional" versus "Small or Irregular." Hoffman argued that today we do not face separate challengers, that is, conventional, irregular or terrorist, and disruptive threats. we are faced with opponents who employ all forms of warfare and tactics, even simultaneously (2007: 7). For example, non-state actors may primarily use irregular warfare, but they may also engage in conventional conflict if it benefits their goals. In addition, nation-states may engage in irregular warfare in addition to conventional types of warfare to achieve their desired outcomes. Peter R. Mansoor, a military historian, offers a similar definition of hybrid warfare. According to him, this is a type of conflict that involves both regular military forces and irregular groups such as guerrillas, insurgents, and terrorists. These groups may consist of both state and non-state actors and aim to achieve a shared political goal (Mansoor, 2012: 14). Similarly, McCulloh and Johnson argue that a hybrid force is a military organisation that combines conventional and unconventional organisations, equipment, and procedures in a one-of-a-kind environment to create synergistic strategic benefits (McCulloh & Johnson, 2013: 2). Thus, the modern conception of hybrid warfare emphasizes that future adversaries are not limited to states, but also state-sponsored groups, and self-funded groups. To these, we can groups can use high-tech capabilities, as well as terrorism and cyber-warfare (Hoffman, 2007: 28). What we see is therefore, a convergence into a multi-modal way of

doing war, that combines the lethality of state conflict with the fanatical and protracted fervour of irregular warfare (Hoffman, 2007: 28).

In recent years, this traditional approach has shifted the focus to non-military tactics and especially technology. Currently, it is especially relevant to the use of social media and propaganda, that is, information warfare – or Information Operations (IO). This is reflected in an interview in July 2014, when former NATO Secretary General Anders Fogh Rasmussen defined hybrid warfare as "a combination of military action, covert operations and an aggressive program of disinformation" (Wither, 2016: 76). Similarly, McCulloh argues that hybrid threats aim to gain an advantage over conventional competitors by focusing on organizational capabilities within a specific environment. This advantage, however, is not limited to military force. It includes all elements of national power such as diplomacy, information, military, economics, finance, intelligence, and law (McCulloh & Johnson, 2013: 2). Overall, we can categorise hybrid threats into two. On the one hand "kinetic", includes all activities related to active warfare and lethal force, such as support for armed uprisings, use of proxy and irregular forces, and military action and intervention. On the other hand, "non-kinetic", consists of subversive measures such as influence and information operations - including disinformation, misinformation, and propaganda - cyber warfare, and intelligence among others (Hurley *et al*, 2009: 1). As argued by Galeotti (2014), although these campaigns often lack a guiding idea they nevertheless revolve around a broad political goal. Its primary goal is to "disrupt, divide, and demoralise". This strategy, therefore, is based on opportunism, fragmentation, and contradicting narratives.

Together, these definitions offer a holistic view of the term and can be considered the basis of the concept (Johnson, 2018a: 146-147). We can therefore consider that the common characteristics of hybrid warfare are:

- An approach that seeks to exploit an adversary's vulnerabilities through a combination of unconventional and conventional military capabilities.

- A conflict that involves regular and irregular forces, as well as the use of other unconventional tactics to achieve a political goal.
- A coordinated and integrated use of a variety of tools and methods, such as cyber-attacks, economic coercion, disinformation campaigns, and military force.
- A strategy aimed at undermining an adversary's political, economic, and military power.

2.3. Hybrid warfare: A Contested Concept

So far, we have looked at the definition of the term, and we have seen that, while there is no main definition or name, there are several defining features. In this section, I will look at what the literature says about the utility of the concept. As mentioned before, there are two understandings of the concept. The first view, and the one presented below, defends the usefulness of the term. The second criticises its limitations and ambiguity.

2.3.1. Hybrid Warfare: A New Form of Warfare

In this section, we look at the concept of hybrid warfare as a new type of warfare. The focus is the defense of the concept as *sui generis.* There are three main arguments in favour of the term hybrid warfare.

The first argument is that hybrid warfare reflects contemporary conflict. According to McCulloh and Johnson (2013: 9), the development of this concept was based on the idea of a synergistic combination of conventional and unconventional forces, as well as criminal behaviour and terrorism. Hybrid Warfare, therefore, reflects modern conflict reality, in which military operations are frequently intertwined with diplomatic, economic, and informational activities. According to Giegerich (2016: 67), Hoffman's writing provides an excellent starting point for conceptual analysis of hybrid challenges. This is because adopting hybrid tactics has led to a novel synthesis that proves challenging to manage as it contests the binary Western beliefs of war and

peace, military and non-military methods, and conventional and irregular strategies. McCulloh argues that Hoffman's concept of the blending effect refers to the optimization of various forms of warfare, both regular and irregular, along with the socially disruptive actions of crime and terrorism, resulting in a strategic messaging effect (McCulloh & Johnson, 2013: 9). Furthermore, they argue that the term builds on the compound warfare idea and combines other elements such as terrorism and criminal activities. Overall, many scholars agree that hybrid warfare, especially after Hoffman´s article, promotes a new dialogue between the traditionally focused and non-traditionally focused sectors and represents "a new way of waging war" (Bachmann & Gunneriusson, 2015, p.199).

Second, its conceptualization helps in the identification and mitigation of new threats. By using the term hybrid warfare, analysts and policymakers can identify new and emerging threats that may not fit neatly into traditional warfare categories (Renz & Smith, 2016: 4). This can facilitate the development of new strategies and tactics to combat these threats. Giegerich argues that one does not need to embrace a new hybrid paradigm to acknowledge that hybrid warfare and threats have a direct impact on European security and can be a useful construct to address contemporary challenges (Giegerich, 2016: 68). Hybrid wars have come to Europe in two distinct forms, with Russia under Putin as a state actor using non-state methods in the East (2016: 68). The actions of the Russian Federation in Ukraine in 2014 sparked a heightened interest in the concept of hybrid warfare, which many Western commentators believed best described the variety of tools and methods used by Russia during its annexation of Crimea and support of separatist groups in eastern Ukraine (Minasyan, 2015). Russian techniques ranged from traditional combinations of conventional and irregular combat operations to the support of protests and demonstrations, political coercion, cyber operations, and a particularly aggressive disinformation campaign. This is illustrated by the already mentioned interview in July 2014,

of former NATO Secretary-General Anders Fogh Rasmussen referring to Russia's tactics as hybrid warfare (Wither, 2016: 76).

Finally, its conceptualisation encourages cooperation among government branches. Hybrid warfare frequently involves a diverse range of actors, including military, diplomatic, intelligence, and economic officials. By employing the term hybrid warfare, policymakers can encourage greater cooperation between these various branches of government (Hunter & Pernik, 2015: 7). As already discussed, the hybrid threat is not limited to the military domain but extends to all elements of national power (McCulloh & Johnson, 2013: 2).

In summary, the concept of hybrid warfare reflects the contemporary reality of conflict and can help identify and mitigate emerging threats that may not fit into traditional warfare categories. Furthermore, the use of the term hybrid warfare can encourage closer collaboration between the different branches of government involved in hybrid warfare. Conceptualizing hybrid warfare has, therefore, enabled a new discourse between the traditionally oriented and unconventional sectors of the American defense establishment. Overall, the concept of hybrid warfare can be a useful construct to address current challenges and develop new strategies and tactics to combat emerging threats.

2.3.2. Hybrid Warfare: An Ambiguous Term

On the other hand, critics of the term do so because of its ambiguity and lack of depth. First, the term hybrid warfare is frequently criticised for being too broad and overused. Some argue that it has been used to describe almost any conflict involving a mix of military and non-military activities, making it difficult to define. Many scholars, as argued by Giegerich, see the concept of hybrid warfare as a passing trend, or worse, as intellectual laziness. He mentions that many would argue that this is simply a modern interpretation of irregular warfare (Giegerich, 2016: 67). As Wither observes, from this perspective,

hybrid warfare is nothing new because it is “too vague for analysts and policymakers to actually use” (Wither, 2016: 74). Latvian analyst Jānis Bērziņš also argues that despite being a catchy word when including a range of non-military tools, the term hybrid warfare describes normal inter-state competition. Furthermore, “it characterises conflict as war even when there is an absence of threat or use of violence” (Wither, 2016: 79). Likewise, Johnson argues that the term has become too broad to be useful, and it has lost its precision. He considers it more beneficial to use the term warfare instead of hybrid warfare since the concept of blended methods is often irrelevant (Johnson, 2018a: 143).

Second, the term hybrid warfare can also lead to overreaction. The use of the term hybrid warfare may cause policymakers to overreact, viewing every non-military activity as a threat to national security (Renz & Smith, 2016: 4). This could result in the militarization of foreign policy and a disregard for other critical aspects of national security, such as diplomacy and economic engagement. Reichborn and Cullen noticed that the term is so widespread that it has become conceptually synonymous with the grand strategy itself (Reichborn & Cullen, 2016: 1). At the same time, the concept of hybrid warfare may overemphasise military components of conflict while underestimating the importance of political, economic, and social factors. There is therefore a distortion of the traditional distinction between peace, conflict, and war (Reichborn & Cullen, 2016: 4).

Finally, the term hybrid warfare has been popularly used to refer to Russian and Chinese activities. Many Western analysts suggested that the Russian involvement in Crimea (and later in Eastern Ukraine) marked the beginning of a new Russian style of hybrid warfare, represented in the "Gerasimov doctrine" (Monaghan, 2015: 65). Nevertheless, Wither argues that the term hybrid warfare is a Western term, not a Russian one. Russian analysts use terms like "new generation warfare" or "non-linear warfare" when writing about it (2015: 80). This implies that there is no proper relationship between what the West thinks

it sees in Russian actions and how Russians themselves see them. As a result, Western discourse on Russia is somewhat abstract and inaccurate (2015: 68). As already mentioned, the term was also very popular within NATO following the publication of a note by General Gerasimov, which is said to be directed against the West's "comprehensive approach" (Johnson, 2018a: 142). This sparked debate about the grey zone between war and peace, as well as Russian asymmetric challenges. These challenges are, according to Monaghan, economic manipulation, extensive use of disinformation and propaganda, the encouragement of civil disobedience and insurgency, and the use of well-supplied paramilitaries. However, he argues that we have overlooked the increasingly obvious role of conventional forces in Russian military thinking (2015: 66). Similar to this case is the Chinese concepts of the "three warfares", “war beyond limits” or “unrestricted warfare”. Despite, as indicated by Raska, China´s foreign policy has traditionally focused on economic leverage and “soft power” diplomacy as its primary means of power projection, in recent decades, Beijing has also engaged in more offensive operations as a way to “exert direct control over the process and outcome in areas of strategic competition” (Raska, 2015: 1). Nonetheless, scholars note that the role of conventional forces is reduced, and in no way parallel to the Russian case.

In summary, while the concept of hybrid warfare has been widely used in recent years, it has faced significant criticism due to its broad definition and overuse, as well as its potential to lead to overreactions and to overlook non-military factors. Some experts argue that the term is too vague to be of practical use and that it may exaggerate the novelty of current methods of conflict. It is therefore important to consider the specific context of each conflict and not to over-simplify complex situations to avoid harmful political decisions.

2.4. Gaps and Contributions

This paper does not directly criticise or debate the term hybrid warfare. While this term is not fully established, it is considered sufficiently comprehensive and

adequate for our study. However, this study notes that, as many experts argue, the term is often used very broadly, with little attention paid to the idiosyncrasies of those who use it. I believe it is necessary to close, or at least minimise, this gap to better understand the use of hybrid warfare, especially in the case of Russia and China.

After reading the extensive literature on the concept, I have observed that most works omit an important aspect of the subject. That is the specific use and rationale for its implementation by major powers. This has led me to hypothesise that hybrid warfare is more than just a weapon to fight conflicts. Hybrid methods can be used as a way to escalate a conflict or to de-escalate a conflict. It depends on the actor and how it is used. In this paper, I exploit this gap to demonstrate that hybrid warfare cannot be limited to a holistic concept, instead, we need to pay to how different actors understand and use it. This paper argues that hybrid warfare is both a way of waging war and a way of avoiding it. Therefore, it supports an individualised analysis of the concept. What I argue is that the concept of hybrid warfare, while important insofar as it describes a modern combination of means and ideas, does not accurately reflect reality. Especially because as explained in the literature, is a Western concept. But also because the understanding of hybrid warfare heavily depends on the understanding each actor has of war and conflict. I propose a two-category differentiation of the term, taking Russia and China as examples. Both understandings are similar overall, but at the same time maintain epistemological differences on how both actors do "war". On the one hand, I believe that Russian "new generation warfare", or "non-linear warfare" is intentionally used to escalate situations and is therefore conceived as a form of conducting warfare. Moscow uses hybrid tools to incite conflict to gain a certain strategic advantage. To this end, Russia attaches particular importance to the use of the military as the basis of its hybridisation and favours aggressive measures as a demonstration of power. China, on the other hand, calls it "three warfares" or "unrestricted warfare" ("war beyond limits"), which I hypothesise

is used as a way of avoiding direct conflict, which allows Beijing to de-escalate situations depending on how he perceives his opponent.

Therefore, this paper aims to contribute to the field by first expanding the concept of hybrid warfare and illustrating its use in the geopolitical and military fields. Second, it aims to shed light on its specific use by Russia and China, which will show how these actors use hybrid instruments in their neighbourhoods to achieve strategic objectives.

3. Research Design

The research design chapter is an essential part of any thesis, as it lays out the groundwork for the entire study. This dissertation follows a comparative case study design to answer the research topic using qualitative methods. The two selected cases are Russia (Russian Federation) and China (People's Republic of China or PRC), each of which includes several sub-cases that will be presented in the following sections. The main goal of this study is to compare how these countries use hybrid warfare, paying particular attention to their objectives when employing it. As already mentioned, this paper argues that while Russia uses hybrid threats it is a way of waging war and inciting conflict, China uses these methods as a way to avoid direct conflict when pursuing strategic objectives. This hypothesis is based on the fact that in recent years, although both countries have used similar hybrid methods to achieve strategic objectives, the aims and consequences of their use have been different in the two cases (Bilal, 2021). By analysing these tactics and strategies, I hope to gain a better understanding of their respective approaches and identify similarities and differences in their application.

In the following sections of this chapter, I will present an analytical framework that includes the criteria for selecting our cases, as well as the key hybrid threats that will guide our analysis. After that I will present my methodology, which explains how I will collect and analyse the data. The chapter will conclude with the limitations and challenges that can be anticipated.

3.1. Analytical Framework

In this section, I will present the framework that I will use for the qualitative comparative case study on the use of hybrid warfare by Russia and China, with their respective subcases. I chose to perform a comparative analysis of case studies primarily because it is the most common method for comparing and contrasting cases. In addition, this approach will allow this paper to be more

focused and manageable given the limited time and resources to conduct large-scale research. It will also allow me to explore the specific characteristics, meanings, and implications of real-world events such as the use of hybrid warfare by both actors. Moreover, this section outlines the criteria for selecting my cases and frames the concept of hybridity that will be used in the analytical chapters.

The rationale behind the comparison between China and Russia is that the two countries share many similarities. The mentioned cases were selected for the following reasons. Firstly, both countries have been accused of using hybrid threats to achieve their goals (Bilal, 2021). These threats will be introduced in the next paragraph and are a mix of kinetic operations and subversive efforts. Second, both countries are regional and global powers attempting to push for more regional influence, and a multipolar world regime (Xinhua, 2023). Third, they share military and political characteristics. Not only are they both military powers, but they are also autocratic regimes with similar strategic policies. For instance, both countries have their own "national" concepts of hybrid warfare, as we have seen before. These concepts are the same time are related in that they seek to revolutionise the international landscape. Finally, we can observe diplomatic and elite proximity and affinity between the two. They maintain strong historical relations and have considerably strengthened their ties, politically, economically, and militarily (Hong, 2023). Given these parallels, it is interesting to study how their strategies diverge on the regional stage.

Given the contested nature of the concept, this paper opts for a solid and standardised definition based on the literature discussed. For this paper, we will consider hybrid warfare to be any tactic that blurs the lines between war and peace. These are actions that combine military (kinetic) and non-military (non-kinetic) actions to achieve political goals. This implies two things, the first is the use of traditional tactics, such as the deployment of irregular armed groups, and the use of regular forces. Second, it implies the use of non-military

techniques such as information operations - propaganda and disinformation, cyber-attacks, political, economic, and legal actions, and clandestine measures – espionage and other types of covert influence. The ultimate purpose of hybrid warfare operations is to create confusion, weaken adversaries, and destroy democratic institutions while avoiding direct military combat. Our analysis, however, focuses on Russia and China. This means that our definition of hybrid warfare is focused on our cases, rather than a simple overarching concept as suggested in the literature. Therefore, our interpretation of the concept differentiates and personalises the aim. Accordingly, to the above definition, we must add the idiosyncrasies of our cases. For this, in our definition of hybrid warfare, I will focus on the cases at hand. In the Russian case, we focus on the concepts of "non-linear warfare", and "new-generation warfare", paying attention to misnamed "Gerasimov Doctrine". This case mainly focuses on hybrid threats in the political, ethnocultural, cyber and military, and paramilitary fields. In the Chinese case, I will focus on the concepts of "three warfares" and "unrestricted warfare" (or "war beyond limits"). Similar to Russia, this case focuses on information operations as well as the political-(para)military aspect. Nonetheless, it differs in its less use of the ethnocultural aspect and more legal and diplomatic measures. However, the criterion in both cases is the pursuit of external territory by civil-military means.

3.2. Methodology

This section contains the methods and techniques I will use to collect and analyse our data. It also outlines the steps that I will take to carry out our qualitative comparative case study. This section includes the following structure: (1) the approach of my research, (2) how I collect my data, and (3) how the data will be analysed. The goal is to collect data that helps us answer the research question concerning how Russia and China conduct hybrid warfare and what their goals are.

For (1), the design of this project is strictly qualitative and based on a body of both academic and non-academic literature. The reason I have chosen to take a qualitative approach is because the topic of this paper is difficult to quantify. This type of research, therefore, involves collecting and analysing non-numerical data (Tenny *et al*, 2023). For (2), this paper will focus on secondary sources to gather data on each country's hybrid warfare strategy. Specifically, through the analysis and comparison of a wide variety of sources such as academic literature, white papers, government documents, evaluations, reports, articles, media, as well as grey literature in general. This research will pay special attention to news articles to analyse the behaviour and track record of both countries' activities. Experts in the field as well as the political and military elites of the two countries will also receive special attention.

For (3), this paper will be a deductive analysis of the selected case studies. This type of analysis begins with a hypothesis or theoretical framework and then analyses historical evidence to examine that hypothesis or framework (Casula *et al*, 2020). This will be reinforced by discourse analysis where appropriate, especially in the case of information operation. For both cases, I have selected several sub-cases or observations that facilitate analysis and seek to reflect a particular behaviour. The first case is the use of hybrid threats by the Russian Federation. The reason behind choosing Russia is that it is recognized as one of the main users of hybrid methods, especially in the last decade. For this case, I will analyse Russia's policy towards Ukraine, in particular the cases of Crimea and the Donbas. I will also briefly analyse the Russo-Georgian War which will serve to provide some background. The reason behind this choice is that these conflicts are considered exponents of hybrid warfare and share many similarities in the sense that Russia applied similar tactics (Clark, 2020). The study period chosen is the last decade, starting with Georgia in 2008, but focusing on the beginning of the Ukrainian campaign around 2013/2014. The second case is the PRC. The reason behind this choice is that, again in the last decade, China has also been accused of using hybrid methods (Cordesman & Hwang, 2020). For

this case, I will analyse specific situations related to its activity in the East and South China Sea (ESCS). The methods analysed will be the use of "salami slicing" and "cabbage tactics", and the construction of the so-called "Great Wall of Sand". These examples have been chosen due to the use of unconventional methods and hybrid measures to advance its objectives. The study period chosen is also the last decade since Chinese activity in the region appears and develops substantially around 2012/2013 (CFR, n/d). These observations will therefore provide me with data insofar as they reflect the attitudes of both countries and their approach to hybrid warfare, facilitating an in-depth analysis of the issue.

Comparing and analysing these observations across cases will allow us to understand both the behaviour and what they expected, or expect, to achieve. The purpose of this study is to shed some light on hybrid threats, in particular those exercised by Russia and China, paying special attention to the objectives, actions, and consequences for both countries and their victims. This analysis will therefore provide additional insights that will help to develop and refine the hybrid warfare theory.

3.3. Challenges and Limitations

This study faces several constraints. The first one, and an important limitation that can be identified is limited access to information. This research faces restrictions on access to certain strategic documents, as confidential information tends to be secret, especially those related to the strategic and military fields. This will force me to often rely on unofficial sources, which may not correctly reflect reality. Furthermore, both countries are autocratic regimes, something that may add difficulties since their governments are less transparent about their goals and especially methods used, and therefore less keen to share certain types of information. Thus, not only will it be difficult to find official sources on the subject, but we will have to frequently rely on Western sources that may be biased or somewhat inaccurate. Another important limitation is the language barrier. This research is focused on Russia and China. However, I have no

knowledge of Russian or Chinese, so finding, understanding, and analysing sources in these languages will be a significant challenge. Additional limitations include those derived from desk-based research, as well as limited time and lack of funding. It is also important to mention possible conflicts due to biased opinions and personal issues, as my cultural background may influence the research to some extent.

Another challenge worth mentioning is the fact that the term hybrid warfare, as mentioned above, is controversial and heavily debated. Especially given that it is a Western term. I, therefore, anticipate a possible distortion between the perception of the term in the West and the countries analysed. This will be reflected mainly in the literature and articles on the subject. I foresee that the desynchrony between the two blocs and the volatility of the term can have a limited impact on the findings of this paper. Moreover, the research may also be affected by the intrinsic limitations of the chosen study method.

4. Case study: Russia

This chapter aims to provide a first analysis of the Russian use of hybrid warfare, with a focus on the distinction between military and unconventional components. As mentioned above, the sub-cases selected for analysis are the annexation and invasion of Crimea and Donbas and the subsequent invasion of Ukraine. This article also briefly discusses the Russian invasion of Georgia, which was the background to the abovementioned observations. The goal is an in-depth analysis of the Russian hybrid approach and its impact on regional security dynamics. By analysing the military and unconventional aspects separately, we can better understand the complex nature of Russia's hybrid strategy.

4.1. Russia and Hybrid Warfare: An Introduction

Since the dissolution of the Soviet Union (USSR), several conflicts and reforms have played a pivotal role in shaping the current state of the Russian military. For instance, Russia closely studied the lessons learned by the United States during their operations in Iraq and Afghanistan, while also drawing insights from their own experiences during the 2008 invasion of Georgia (AWG, 2016: 2). These observations were instrumental in guiding the development of Russia's armed forces. In the conventional aspect, Russia's military has undergone a process of modernization, characterized by a growing emphasis on advanced technology. A notable aspect of Russia's operational approach is the utilization of Battalion Tactical Groups (BTGs), which enables the country to deploy its forces rapidly and forcefully within the region. Russia has therefore prioritised smaller expeditionary operations within its regional area of influence as a result, which allows it to fulfil its tactical, operational, and strategic goals with greater speed and intensity (Grau & Bartles, 2022). This is a significant contrast compared to the Cold War era and even the conflicts in Chechnya during the 1990s. This adaptability was evident in Russia's annexation of Crimea and the invasion of Ukraine (AWG, 2016: 2).

In the last decade, Russia has also adopted an important non-conventional doctrine that has given rise to frequent discussions about the use of hybrid methods and their implications. As already discussed in the literature chapter, this aspect has become particularly relevant within NATO, due to the publication of a note by Valery Gerasimov, the Russian armed forces' chief of general staff. In this note, Gerasimov assessed future operations and proposed a response to the West's effective utilization of multiple lines of operations, airpower, and local forces to achieve strategic outcomes. Despite this note was intended to counter the West's "Comprehensive Approach" (Johnson, 2018a: 142), it has since become inaccurately known as the "Gerasimov Doctrine". However, the term hybrid warfare (in russian *gibridnaya voina*) has been primarily used in Western discourse (Monaghan, 2015: 68). When Russian analysts discuss similar concepts, they often employ terms such as "new generation warfare" or "non-linear war." Within this framework, Russian analysts emphasize the critical role of information and psychological warfare as the foundations for success in what they describe as "new-generation war" (Wither, 2016: 77). The term "Russian New Generation Warfare" (RNGW) thus reflects the Russian perspective on the evolving nature of warfare and the significance they attribute to information and psychological operations in achieving their objectives.

Despite being misinterpreted, the Gerasimov note triggered a wider discourse on the grey zone between war and peace, highlighting concerns about various Russian asymmetric challenges. These challenges, as we will discuss in the next section, encompass extensive disinformation and propaganda campaigns, incitement of civil disobedience, the backing of insurgency, and the deployment of well-equipped paramilitary forces (Monaghan, 2015: 66).

4.1.1. New Generation Warfare and Non-Linear War

As mentioned above, many Western scholars refer to Russian tactics in Ukraine as hybrid warfare. However, many have questioned this interpretation, arguing

that it more correctly characterises Western nations' behaviour. By the end of 2015, Russian officials had publicly rejected the term hybrid to characterise their actions. In 2013, two Russian authors acknowledged the importance of information and psychological warfare in the emergence of future conflicts (Chekinov & Bogdanov, 2013). They predicted that the next generation of warfare would be primarily characterised by these forms of warfare, to gain superior control over troops and weapons while simultaneously demoralising and psychologically impacting the adversaries' armed forces personnel and civilian population. Furthermore, they stressed that the groundwork for success would be largely formed by the proper deployment of information and psychological warfare methods in the current revolution of information technology. This gave rise to the term “new generation warfare” (NGW or *Война нового поколения*) (Iasiello, 2017: 60-61).

Another related term that is also commonly used in Russian literature and discourse is "non-linear warfare" (NLW) (Ball, 2019). The person that coined it was Vladislav Surkov, a prominent figure in Russian literature and a senior political advisor to President Putin (Perry, 2015). The term "non-linear" warfare refers to conflicts in which traditional distinctions such as obvious front lines or discrete friendly/enemy zones do not exist. That is the grey zone. Non-linear warfare means ignoring constraints and sometimes involves limited planning, allowing a state to capitalise on chances as they emerge. At first glance, this type of warfare appears to consist of a variety of strategies that do not appear to be typical acts of war (Schnaufer, 2017: 21-22). However, as with any conflict, the ultimate goal remains the same: to push the aggressor's objectives on the adversary. As Schnaufer points out, the overarching goal in engaging in NLW is to wear down the enemy socially, politically, and militarily. Is important to mention that NLW often overlaps with NGW (2017: 23).

Shortly afterwards, Gerasimov merged these concepts and popularised them. He observed that current conflicts involve the extensive use of political, economic,

informational, humanitarian, and other non-military means, complemented by civil unrest among the local population and concealed armed forces. Interestingly, many elements associated with this conception of hybrid warfare are also found in discussions on the already 4GW. A key concept in fourth-generation warfare is the exploitation of emerging information technology, which enables military actors to undermine the willingness of states to engage in conflict (Voyger, 2021). To achieve this one must target decision-makers and the general public through the interconnected global media and the Internet. The new goal is, therefore, to bring about regime change rather than victory in conflict (AWG, 2016). Consequently, warfare expands beyond conventional military dimensions and incorporates cultural, social, legal, psychological, and moral aspects, reducing the relative importance of traditional military power (Wither, 2016: 78).

Nevertheless, Gerasimov's paper acknowledges the essential supplementary role of the armed forces in new-generation warfare (Wither, 2016: 80-81). While not every regime change need military intervention, when employed, it should be executed in collaboration with and through segments of the local population. This incorporation of local actors gives legitimacy to military actions on the global stage, creating the hybrid manoeuvre concept observed in Russia's operations in Ukraine, Syria, and elsewhere (AWG, 2016). The armed intervention itself is therefore considered the culmination point, preceded by extensive preparations aimed at creating unrest and exerting influence over sub-state actors (Gressel, 2015: 6).

4.1.2. Russian Hybridness

Russian NGW is therefore multi-layered. On the one hand, we have the role of the armed forces, that is, the conventional part. On the other hand, we have non-conventional practices. This section addresses the main hybrid mechanisms and instruments used by the Kremlin with its neighbours.

The prioritization of information and the pursuit of "information superiority" constitute a significant component of Russia's doctrines and strategic framework (Jaitner & Mattsson, 2015). For instance, IOs hold a significant position within Russia's military doctrine. This is part of what Russia calls *informatsionnaya vojna* or “information war” (Jasper, 2020: 71; Bagge, 2019: 37). Russia has considerably improved its ability to shape political narratives across multiple countries through strategic communications (AWG, 2016). Russian IO activities encompass a wide range of tactics, including propaganda, disinformation campaigns, and psychological operations that promotes Russia´s interests (Jaitner & Mattsson, 2015: 40-43). Notable examples include the propaganda disseminated through media outlets such as RIA Novosti, Russia Today (now RT) and Sputnik News or its social media campaigns with online trolls, bots, and fake news farms. The purpose is to create confusion and cast doubt on objective truths. By leveraging these methods, Russia, therefore, seeks to manipulate information, influence public opinion, and shape narratives to advance its military and political objectives (Chivvis, 2017: 2). This comprehensive approach allows Russia to not only impact the operational dynamics on the ground but also gain favour among local populations and project a favourable image internationally (AWG, 2016: 2). The Kremlin has also developed a cyberwarfare doctrine to hack into information systems and gather valuable intelligence. This information is subsequently employed to influence elections and manipulate political outcomes beyond Russia's borders. This strategy was evident in Russia's alleged attempts during the 2016 U.S. presidential campaign (Jasper, 2020: 75; Chivvis, 2017: 3).

In addition, Russia employs a variety of proxies to advance its interests, often collaborating with groups that share similar objectives (Chivvis, 2017: 4). As indicated by AWG, the main reason for employing proxy forces, or “self-defense groups”, is the preservation of Russian manpower. By coercing the local population, Russia can use them as frontline troops, thus initially sparing their forces. This strategy involves a combination of local recruits and

mercenaries from Russia and former Soviet republics, enabling Russia to reserve its trained forces for significant military campaigns. The deployment of proxy forces also serves to bolster Russia's narrative and information operations on an international scale. It is worth noting that Russia does not officially acknowledge or disclose casualties among the local or contracted fighter populations (AWG, 2016).

Russia also engages in clandestine measures to advance its interests. For instance, the Kremlin values traditional espionage as a component of its hybrid methods, employing tactics such as bribery, extortion, and other means to influence susceptible political figures to advance its interests. One example is the attempts to bolster political parties and candidates aligned with their interests while criticizing political leaders who hold more critical views toward Russia (Chivvis, 2017: 4). Since 2014, Russia has covertly provided around $300 million to political parties, officials, and politicians in over two dozen countries. With this, the Kremlin and its proxies aim to shape foreign political landscapes in favour of Moscow (Wong, 2022).

In addition to this, and as part of its wider military modernization program, Russia has allocated resources to enhance its special operations forces. These forces have various roles, with one notable aspect being their involvement in infiltrating foreign nations and orchestrating hybrid warfare efforts there (Kasapoglu, 2015: 5-6). For instance, Russian military intelligence was reportedly involved in instigating the overthrow of the pro-NATO Montenegrin government in 2016. Russian special forces also played a crucial role in the annexation of Crimea and in providing support to separatist groups in the Donbas region (Chivvis, 2017: 3).

4.2. The Beginnings of a War Model: The Russo-Georgian War

As we will elaborate on in the upcoming sections, Russia has employed espionage and network intrusion as crucial preliminary steps before resorting to conventional military invasions. These activities serve as precursors, providing a forewarning before the escalation of conflicts into the use of force. The first use of this model dates back to 2008, during the Russian invasion of Georgia (Hunter & Pernik, 2015).

Following the collapse of the Soviet Union, South Ossetia declared its independence from Georgia. A separatist government was then installed, controlling some parts of South Ossetia, while Georgia retained control over other sections. After a brief war in 1991-1992, Russia, Georgia, and Ossetia agreed on a ceasefire, with peacekeeping forces stationed in the region. The arrangement remained fragile, and when Mikheil Saakashvili became president of Georgia in 2004, he made reclaiming South Ossetia a priority. Additionally, he pursued Georgia's membership in NATO, which alarmed Moscow (Segal, 2016: 66). In 2006, a dubious referendum was held in South Ossetia, where support for Georgia's independence was “overwhelming”. In the summer of 2008, South Ossetian forces started bombing Georgian settlements, prompting occasional responses from Georgian peacekeepers stationed in the area. In response, Russia conducted military exercises near the border with over 8,000 troops (Dickinson, 2021).

On August 7, increasing artillery attacks by South Ossetian separatists prompted Georgia to announce the end of the 1992 ceasefire agreement. The Georgian forces proceeded to Tskhinvali, the capital of South Ossetia. As a result, Russia accused Georgia of committing "genocide" and "aggression against South Ossetia” and launched a full-scale invasion of Georgia (Osborn & Whalen, 2008). Following the capture of Tskhinvali, Russian army units proceeded into Georgia, approaching Tbilisi, the capital. Russia formally recognised South

Ossetia as an independent entity two and a half weeks after the conflict ended (Segal, 2016: 66).

During this conflict, Russia and Georgia competed for dominance in information dissemination to the international community. This rivalry took many forms, including, as mentioned before, traditional military actions such as strikes and troop deployments, but also non-kinetic methods such as cyberattacks, media dissemination, and the use of denial and deception tactics (Iasiello, 2017: 52). During the conflict, Russia employed a combination of technical and psychological information tools alongside military attacks (Hollis, 2011). Cyberattacks, including website defacements and denial of service attacks, targeted the Georgian government, media, and financial institutions. While no direct link to the Russian government was proven, these actions marked the first instance of cyberattacks and conventional military operations working together. In addition to this, the attacks also denied access to 54 critical websites leading to speculation about potential Russian involvement (Oltsik, 2009).

Throughout the conflict, Russia also engaged in continuous information-psychological operations, employing propaganda, information control, and disinformation efforts. Their goal was to alter world perceptions by portraying Georgia as the aggressor, justifying Russia's defense of its citizens, and responding to criticism from the US and Western allies by highlighting similar actions as those taken in Kosovo (Iasiello, 2017: 53). Russia, therefore, managed to control the flow of international information, influenced the local populations, and spread allegations of Georgian crimes through controlled news coverage and interviews with military spokespersons (PRNEWS, 2008).

Another instrument to be considered is the passportisation campaign conducted by Russia in South Ossetia and Abkhazia. "Passportisation" refers to the mass granting of Russian citizenship to the inhabitants of a specific territory by the distribution of Russian passports (Artman, 2013: 683). This can be viewed as a

"clandestine" method. As a result, the implementation of passportization had a substantial impact on both regional demographics. In a single month, June 2002, the percentage of Abkhazians with Russian citizenship increased from 20% to 70%. This rising trend persisted, and by January 2003, it had surpassed 80%. Similarly, in South Ossetia, passportization activities began in May 2004 and resulted in a significant increase in the proportion of Russian nationals in the province. By September 2004, the ratio had risen from around 56 per cent to 98 per cent (Nagashima, 2017: 188).

Many analysts at the time argued that Moscow and its puppets – or proxies, prompted then-Georgian President Mikhail Saakashvili to intervene militarily (Dickinson, 2021). In this case, Russia invested significant time, possibly spanning years, in monitoring government networks. As illustrated in the following sections, and as observed by Hunter, the detection of any signs of Russian intrusion should serve as a form of preliminary warning (Hunter & Pernik, 2015).

4.3. Extrapolating Success: Russian Activity in Ukraine

A few years later, new events unfolded in Ukraine. The Ukrainian "crisis" began with protests in Kyiv after President Viktor Yanukovych suspended the Association Agreement with the European Union in November 2013. These protests persisted for several months and prompted Yanukovych to make concessions in a deal mediated by Germany, Poland, and France. However, Russia declined to endorse this agreement. Despite the deal, protesters demanded Yanukovych's resignation, which eventually occurred when he fled Kyiv on February 21. The United States and European Union swiftly recognized a new government, while Russia criticized the interim president, Oleksandr Turchynov, considering his appointment as a coup (Segal, 2016: 70).

After the Ukrainian *Revolution of Dignity* (or Maidan Revolution) in March 2014, some protests opposing the revolution and favouring closer ties with

Russia emerged in the Donetsk and Luhansk regions of Ukraine, known as the Donbas. These protests coincided with Russia's invasion and annexation of Crimea. Backed by Russia, armed separatists took control of Ukrainian government buildings and proclaimed the Donetsk and Luhansk People´s Republics (DPR and LPR) as independent entities. Consequently, this sparked a conflict between the separatist forces and the Ukrainian government's military (Grossman, 2018).

4.3.1. Crimean Invasion

As noted above, the term hybrid warfare gained significant attention in defense, policy, and media circles following the Russian annexation of Crimea in 2014 (Fridman, 2018). Previously limited to military theory circles, it emerged as a mainstream term used to describe various security and defense challenges faced by the West (Reichborn & Cullen, 2016: 1). This event also sparked subsequent discussions and deliberations on the topic of Russian hybrid strategies (Chivis, 2017). In Crimea, Russia used a combination of hybrid tools to emerge victorious. These were mainly, as we will see below, IO, cyber warfare, clandestine measures, and political influence, as well as proxies. These were in conjunction with an indirect military intervention. This is because the main objective of Russia's 2014 annexation of Crimea was to gain territorial authority without using overt or conventional military measures (Chivvis, 2017).

At the tactical level, Russia employed electronic warfare and cyber-attacks to disrupt the Ukrainian authorities' ability to respond effectively (Brandom, 2014; Geers, 2015: 62). As an example, before the entry of the Russian military into the Crimean Peninsula on March 2, 2014, Russia launched cyber-attacks on Crimea. These cyber-attacks disrupted telecommunications infrastructure, rendered crucial Ukrainian websites inoperable, and disabled mobile phones belonging to key Ukrainian officials (Iasiello, 2017: 54; Geers, 2015: 75). During the occupation, Ukrainian mobile operators also reported an increase in the rate of cybercrime coming from Crimea, implying that Russian security

services had received intelligence from the information gathered from these illegal actions (Geers, 2015: 62). However, before the invasion, Russia had already engaged in cyber warfare in Ukraine. For instance, in 2013, the Kremlin launched "Operation Armageddon", that targeted key officials of the Ukrainian government, security forces, and army. This coincided with the start of negotiations for an Association Agreement between the European Union and Ukraine. Russia regarded this potential pact as a substantial threat to its national security (Iasiello, 2017: 55; Geers, 2015: 73). To maintain deniability, Moscow mostly relied upon “patriotic hackers” (Hunter & Pernik, 2015: 6).

Russia's successful campaign in Crimea in 2014 relied heavily on information warfare. The Kremlin employed extensive media manipulation techniques to blur the distinctions between truth and falsehood, constructing an alternate reality for those who believed the Russian media's narrative. For instance, after the removal of the Yanukovych government in early 2014, Russian media referred to Ukraine's interim administration and the protest movement as a "fascist junta" (Geers, 2015: 45). According to Kofman, the Russian information campaign during the annexation of Crimea had three main goals. Undermining the credibility of the newly established Ukrainian government, exacerbating concerns about the safety of Russians living in Ukraine, and cultivating broad support for Crimea's incorporation into Russia, which was portrayed as a return to a secure and familiar environment. On February 26, a day before the Russian military took control of government buildings in Crimea, Russia stepped up its attempts to spread the idea that Ukraine's leadership change was illegitimate (Kofman *et al*, 2017: 13).

During the invasion, Russia also employed propaganda as a non-linear warfare tactic, expanding its misinformation campaign. The Kremlin used official media channels, such as RIA Novosti and Voice of Russia, to cover the events in Crimea, manipulating and distorting intended for their population (Kofman *et al*, 2017: 12). Since then Moscow has eliminated all domestic independent

media outlets while increasing funding for media outlets it owns. Furthermore, Russia started to expand its coverage in Western European and North American countries with outlets like RT and Sputnik (Schnaufer, 2017). In addition, pro-Russian online media groups also used “mimicry strategies” to manipulate public opinion by imitating anti-Russian news sources. One example was the launch of the website “Ukrayinska Pravda”, which portrayed itself as a pro-Russian counterpart of the widely renowned and largely pro-Ukrainian news site “Ukrains'ka Pravda”. These pro-Russian sources spread manufactured narratives about real-world events, such as denying Russian military presence in Ukraine or attributing extensive information warfare against Russia to the West (Iasiello, 2017: 56).

The Kremlin also funded "troll farms", or “Russian Web Brigades”. Despite their limited impact, their presence in large numbers across multiple internet platforms gave them visibility (Fitzpatrick, 2014; Geers, 2015: 93). During the Crimean campaign, pro-Russian media outlets, discussion forums, and social network groups actively participated in propaganda distribution. The influence was also extended to Wikipedia, where Russian propaganda teams made widespread changes to entries related to the ongoing events in Crimea (Geers, 2015: 62). Some experts observed that Russia's modern propaganda activities were no longer primarily aimed at propagating a particular viewpoint. Instead, they were used to manipulate information flows and instil fear. By overwhelming internet forums, these tactics attempt to change public opinion, create uncertainty, and demoralize foreign audiences (Levinson, 2015). Russia's propaganda campaign in Ukraine was therefore designed to exploit existing societal vulnerabilities, weaken the government, and state institutions, and degrade the Ukrainian state's perceived legitimacy. IOs were therefore utilized to influence and shape public perception, recognizing that it has become the central strategic focal point in modern armed conflicts (Wither, 2016: 77).

The issuance of passports – or “passportisation”, to Ukrainian citizens in Crimea, particularly in Sevastopol where Russia's Black Sea Fleet is located, also proved to be useful for Russia. For instance, President Putin used it to justify his invasion of Ukraine. This is because those with a Russian passport were now Russian citizens (RFE/RL, 2014). This tactic, to justify intervention under the pretence of protecting the locals from genocide or oppression, had been used six years earlier in the invasion of Georgia. Despite this move carrying little weight on the world stage in legitimising their invasion, it added confusion and a perfect justification. Moreover, these actions had a more significant impact domestically in Russia and led to increased support for the war (Geers, 2015: 45). All of these examples align with the primary objective of NLW, which seeks to create uncertainty regarding the truth and foster internal divisions within the enemy, thereby hindering their ability to take decisive action (Schnaufer, 2017).

Another point is the “emergence” of Crimean nationalists, which appealed to Moscow for protection against perceived threats from the western part of Ukraine, which they labelled as "fascists" (Geers, 2015: 45). On February 28, 2014, a new element was added to the NLW playbook with the emergence of the so-called "little green men" in Crimea (Segal, 2016: 70). These armed individuals wore military uniforms resembling those of the Russian military but without any identifying markings, flags, or insignia. These forces were also equipped with Russian-made weapons and spoke Russian. Moscow denied any direct involvement of the Russian military, referring to these fighters as “volunteers”, “self-defense militias”, or "polite men", as the Russian press termed them. Locally, Ukrainians dubbed them "little green men" due to their uniform colour (Segal, 2016: 66; Chivvis, 2017). These men strategically occupied key locations in Crimea, including the Simferopol Airport. Exploiting the confusion following the collapse of the government in Kyiv, Russia easily denied any affiliation with these armed men. Putin also relied on the assumption that the Ukrainian military stationed in Crimea would not put up resistance.

News reports speculated on the identity and mission of the "little green men," with some rumours suggesting they were local militia groups protecting the Russian population. Despite the uniformed men claiming to be volunteers, some of these proved to be mercenaries of the Private Military Company (PMC) Wagner (Butusov, 2016). Before Kyiv could mount a military response, Crimea had already fallen under Russian control (Schnaufer, 2017). On March 16, a referendum was held in Crimea to vote on Ukraine's secession. The following day, Russian President Vladimir Putin acknowledged the region as an independent state. On March 18, Putin confirmed the assistance of the "little green men" in the operation, and the Russian Defense Ministry subsequently issued a victory medal to soldiers involved in the "return of Crimea" (Segal, 2016: 70).

As illustrated by all these episodes, Russia used several alternative tactics in combination with conventional action to seize control of Crimea from Kyiv. It actively encouraged pro-Russian demonstrations in the region, creating a narrative in their favour, and weakened the Ukrainian government, while deploying unidentified armed soldiers ('little green men') to occupy government buildings without clear markings. Once Russian troops settled in the region, Moscow orchestrated a local referendum to provide a semblance of legitimacy to the annexation process (Lanoszka, 2016: 182). Along with all this, Russia also engaged in IO and cyber attacks. At the same time, several favourable factors contributed to the Russian success. These factors included a predominantly pro-Russian civilian population, the presence of Russian military installations and personnel, which allowed for the discrete deployment of special operations forces, a weakened political leadership in Ukraine, minimal military resistance, pro-Russian civilians, and a lack of a swift response from the international community, which was caught off guard by Russia's speed (Renz and Smith, 2016: 6). Overall, Russia practised tactical, operational and strategic deception. This is linked to the Russian concept of *maskirovka* (“disguise”), a traditional operational technique of concealment and camouflage

used in conventional operations (Jasper, 2020: 75; Kofman *et al*, 2017: 23; Kasapoglu, 2015: 5).

We can therefore observe that both Georgia and Crimea were theatres where Russia sought to create a pretext for overt and conventional military action (Balzer, 2015: 80-81). In Georgia, this led to a direct conflict primarily due to a stable and combative government. In Crimea, on the other hand, Russia sowed and found favourable conditions for peaceful intervention. In any case, Russia created a situation through the use of different instruments, which led to an armed invasion.

4.3.2. Donbas War

As mentioned earlier, Russia's actions in Ukraine in 2014 sparked increased interest in the concept of hybrid warfare. Many Western analysts found the term hybrid to be the most fitting description for the diverse array of tools and tactics employed by the Russian Federation during its annexation of Crimea. This model was then exported to the Donbas, where Russia supported separatist factions in eastern Ukraine. Again, these tactics encompassed a blend of conventional and irregular military operations, as well as support for political protests, cyber operations, and notably, an extensive disinformation campaign (Wither, 2016: 76).

As happened in Crimea, Russia was heavily involved in subversive and propaganda campaigns, along with various disinformation efforts both domestically and internationally. To undermine European support for Ukraine, Russia launched a multifaceted campaign including political leaders, intelligence services, and Russian companies. According to Gressel (2015: 6), Russia had been preparing for a military campaign in Ukraine since at least 2008, establishing and connecting pro-Russian nationalist groups while simultaneously infiltrating local intelligence, military, economic, and administrative structures. This led to the creation of a “fifth-column”. The

establishment of parallel structures and covert support bases played a crucial role to achieve an advantageous position. Furthermore, Russian traditional media outlets aligned with the Kremlin consistently portrayed a negative image of *Euromaidan* and the city of Kyiv. They also propagated narratives such as the claim that Ukrainian brutality towards the Russian-speaking population led to hundreds of refugees seeking asylum in Russia (Gressel, 2015: 6). Since 2014, the Russian government consistently accused Ukraine of committing genocide against the residents of the Donetsk and Luhansk areas. In 2015, President Putin implied this by saying, "It smells like genocide" (Al-Jazeera, 2022a). According to the allegations, Ukrainian officials were targeting and punishing residents who spoke Russian, threatening them with assault or death. However, over time it turned out that the victims of the "Donbas genocide" were paid actors, as was recently revealed by “trolls” fired by Yevgeny Prigozhin (Voichuk, 2022). However, following Surkov's ideology, the intention was to create a kind of division based on "us" and "them" (Shandra & Seely, 2019: 8).

This disinformation campaign was also significant in the context of the downing of Malaysia Airlines Flight 17 (MH17). On July 17, 2014, the plane was shot down over eastern Ukraine – controlled by Russian separatist forces, with 298 passengers of diverse nationalities. Investigations determined that the plane was hit by a Russian-made Buk surface-to-air missile (SAM), causing it to crash and killing everyone on board (Higgins & Clark, 2014). In the immediate aftermath of the incident, the Russian Internet Research Agency (IRA or *Glavset*), known as a "troll farm", posted around 111,486 tweets from false accounts over three days. Initially, the tweets, which were mostly in Russian, suggested that the rebels were responsible for shooting down a Ukrainian plane. However, the narrative quickly changed, with tweets accusing Ukraine of being behind the attack (Knight, 2019). Subsequent research proved the involvement of pro-Russian separatists in his downing, as well as senior officials of the Russian Defense Ministry and its military intelligence agency, the GRU (Bellingcat, 2014). In 2023, Yevgeny Prigozhin, leader of the Russian PMC Wagner, and a

close ally of Putin, admitted to being involved in the creation of the IRA (Stognei & Seddon, 2023). Until recently he owned the media holding “Patriot” dedicated to spreading disinformation and propaganda (Krever & Chernova, 2023).

Social media platforms have therefore played a significant role in the Russian media landscape. They widely spread the concept "Russian World" (Р*усский Мир*) started by Putin, as well as other concepts such as the "Russian soul" and "Russian values" (Shandra & Seely, 2019: 65). Since then, these ideas have been systematically promoted, encompassing not only ethnic Russians but also the global population that speaks Russian (Jaitner & Mattsson, 2015: 42; Geers, 2015: 92). The Russian information campaign in Donbas was reinforced when Putin referred to the south-eastern regions of Ukraine as *Novorossiya* (New Russia). This was part of Putin´s irredentism cause and gave credibility to the separatist movements by characterising the Donbas region as a historical part of New Russia (Shandra & Seely, 2019: 28-31; Kofman et al, 2017: 51). The overall narrative wanted to portray Russia as a powerful nation, pursuing an imperialist agenda, while at the same time being a misunderstood and unfairly judged victim. Furthermore, IO emphasized Russia's role as a crucial opposing force to Western liberal ideals, highlighting the perceived erosion of "traditional values" within the Western sphere and the alleged hypocritical conduct exhibited by Western actors in global affairs (Geers, 2015: 92). Consequently, the goal of the Russian narrative has been to cast doubt on the trustworthiness of the West's ideologies, systems, and behaviours.

As in the previous cases, the Kremlin once again used the tactic of passportisation. From the beginning of the hostilities in eastern Ukraine until 2020, Russia granted nearly 200,000 Russian passports to individuals from the "People's Republics" of Donetsk and Luhansk in Ukraine. The strategy of passportising the Donbas region became a well-established tool in Russia's foreign policy arsenal. By deliberately fostering controlled instability, Russia

aimed to complicate the resolution of territorial conflicts in the post-Soviet space. This intervention in state sovereignty also served to exert pressure on the central government in Kyiv. As in previous cases, the legal "Russification" of these territories served as a justification to intervene in defense of the Russian population (Potočňák & Mares, 2022: 4). And this, along with Russian rhetoric of Ukrainian oppression of these territories, attracted popular support at home under the excuse of "humanitarian" intervention (BBC, 2021a). Internally, Russia also sought to counter its declining population by attracting immigrants. Due to the conflict in eastern Ukraine, an increasing number of Ukrainians migrated to Russia, prompting a revision of Russia's migration strategy in 2018. By prolonging the conflict without resolving it, Russia accomplished two simultaneous objectives. On the one hand, it maintained its influence over Ukraine through the Donbas region, and on the other hand, it also became a more appealing destination for Ukrainian emigrants (Burkhardt, 2020: 2).

As in Georgia and also Crimea, Russia sponsored and armed local militias and groups. The purpose of this "fifth column" was to establish de facto pro-Kremlin governments (Lanoszka, 2016: 179). For instance, while the Maidan was taking place, Russian residents were allegedly paid to cross the border and participate in these demonstrations – described as "professional agitators". Many others most likely came of their own free will to support the cause. The Kremlin also relied on local actors that were either "ideological allies" or paid collaborators (Shandra & Seely, 2019: 38). There were also accusations that the Russian intelligence was inciting unrest and discontent in the region (Kofman *et al*, 2017: 33). Subsequently, militias were established in the Donbas under the excuse of "safeguarding" the local population against what they perceived as a significant ultranationalist danger. This perception was amplified by Russian television, which portrayed the Euromaidan movement as a fascist seizure of power (Geers, 2015: 45). The militias received swift reinforcement from Cossacks, Russian "volunteers", and individuals sympathetic to the Russian cause within the Ukrainian armed forces. After the initial successes of the

Ukrainian Anti-Terrorist Operation (ATO) in the spring and summer of 2014 Russia decided to send more "volunteers" and weapons to the east of Ukraine (Coyle, 2018).

In April 2014, special forces (*Spetsnaz*) troops and secret service officials collaborated with criminals from the Donbas as well as Russian nationalists who had crossed the border intending to seize control of multiple cities within the region. This undertaking was part of a Russian special operation to instigate instability and unrest in Ukraine (Mitrokhin, 2015: 227). These separatists managed to seize government buildings in several cities and declared independence (Kofman *et al*, 2017: 39). Nevertheless, these militias suffered serious setbacks in the months that followed. Many analysts at the time asserted that they were on the brink of defeat. When Moscow realised that this support was insufficient it opted for its “deniable” military invasion in August 2014. With the support of Russian troops, the rebels led a sudden and unexpected counter-offensive, encircling and forcing thousands of Ukrainian troops to withdraw. This turn of events reversed the situation on the ground and led to a frozen conflict, similar to the Ossetian case (Coyle, 2018). As in Crimea, Moscow also deployed Wagner mercenaries, among other PMCs, to support the rebel cause without getting its hands dirty (Butusov, 2016; Ponomarenko, 2018).

As of May 2014, the insurgents proclaimed the Donetsk and Luhansk "People's Republics". In addition, they held unrecognised referendums, labelled as fraudulent by the international community, to claim popular support for their insurgency (Roozenbeek, 2022). The referendums held under these conditions were far from typical, with significant flaws such as the absence of international observers, outdated electoral lists, and the use of photocopies for voting papers. The presence of heavily armed men overseeing the procedure, combined with confusing wording on the ballot papers, added to the referendum's unusual nature. Furthermore, an unsuccessful Ukrainian attempt to block voting in a

specific town resulted in a fatality, adding to the overall image that this was a very irregular referendum (Walker *et al*, 2014).

Moscow persistently refuted any direct involvement in the armed conflict between Kyiv and rebel groups in eastern Ukraine. However, it extended diplomatic protection to these rebels and supplied them with significant military weapons and logistical assistance (Lanoszka, 2016). Despite the Kremlin's claims to the contrary, substantial evidence suggests the participation of Russian units in combat against Ukrainian forces within the Donbas region. Not only did President Putin admit that Russian forces were in Ukraine (Coynash, 2016), but the Ukrainian government was able to identify Russian airborne forces and *Spetsnaz* troops killed in action (Mitrokhin, 2015: 220).

As in Georgia and Crimea, the Donbas can be considered another testing ground for Russia, where Moscow tried to create a pretext for overt and conventional military action. In this case, Russia tried to take the Donbas by force through proxies instead of involving its conventional forces. Russia's evolving policy was based on minimising political and geopolitical costs. The intention was, as in Crimea, not to fire a single shot. When that failed, however, Russia opted for Plan B, a direct covert military intervention. Therefore, we can observe a clear pattern of behaviour.

4.3.3. Russian Invasion of Ukraine

In the months leading up to the invasion, Russian military forces massed near Ukraine's borders, despite consistent denials from Russian officials regarding any intention to initiate an attack. However, on February 24, 2022, Russian President Vladimir Putin announced a "special military operation" (SMO) aimed at assisting the self-declared separatist regions of Donetsk and Luhansk (BBCb, 2022b; Federation Council, 2022). Putin justified the operation as an effort to "demilitarize" and "denazify" Ukraine. Additionally, he expressed irredentist views by questioning Ukraine's right to exist and propagated false

allegations that the Ukrainian government was led by neo-Nazis who were persecuting the ethnic Russian minority (Spectator, 2022). The IOs that Russia began in 2014, served as a justification to explain the new invasion.

Russian IOs that began with Crimea and the Donbas escalated over the years, reaching significant levels in the months leading up to Russia's invasion of Ukraine in 2022 (CBC, 2022). Russian state media have actively engaged in an information war by disseminating disinformation (Paul, 2022). This disinformation campaign is conducted by governmental agencies, as well as web brigades linked to the Russian Federation, DPR, and the LPR. Russian disinformation and the spread of fake news stories have revolved around various themes. The main themes were that the Ukrainian government was neo-Nazi, that the Ukrainian military was committing genocide in the Donbas, that NATO was provoking Russia, and that the Ukrainian nation did not exist. Since 2014, Putin and other Russian authorities had claimed that the Ukrainian administration was neo-Nazi, and one of its stated aims was the "denazification of Ukraine" (Johnson, 2022b: 11-12; Kirby, 2022).

Russian propaganda also made extensive use of social media platforms to disseminate their narratives about the unfolding events and to amplify opposing opinions on the war. Platforms such as Facebook, Twitter, TikTok, YouTube, and Telegram were used by a variety of actors, including government officials, ordinary individuals, and state agencies, to distribute information and impact public opinion (Perez & Nair, 2023). Before the invasion, media outlets and online users (or netizens) started posting videos, photos, and news of Ukrainian attacks on pro-Russian areas. This has been proven by fact-checkers, including organizations such as Bellingcat (CBC, 2022). Furthermore, a New York Times examination of 8,000 Russian websites on the day of the invasion discovered a substantial increase in allegations of Nazism against Ukraine (Smart, 2022). Moreover, when announcing the invasion, Putin also claimed that Ukraine was committing genocide in the Donbas region, which is primarily Russian-

speaking. Putin stated that they had been subjected to "genocide perpetrated by the Kyiv regime" for the past eight years. Therefore, the "military operation" was being carried out to "protect the people" of the Russian-controlled separatist republics of Donetsk and Luhansk (Hinton, 2022). Russian propaganda also claimed that NATO was responsible for the invasion and that Russia was forced to invade Ukraine in order to defend itself. Putin stated in his address launching the invasion that NATO military infrastructure was being built within Ukraine and posed a threat to Russia. Putin also claimed that Ukraine was under NATO control (Klug & Baig, 2023; Kramer, 2015: 12).

Russia also presented bogus arguments to legitimise the invasion, including the delegitimization of Ukraine as a nation and state. For example, Russian propaganda portrayed Ukrainians as part of an all-Russian nation. For years, Putin questioned the identity of the Ukrainian people and the country's legitimacy. For instance, its 2021 article "On the Historical Unity of Russians and Ukrainians" disseminated conspiracy theories about Ukrainian national identity as an "anti-Russian project" (Putin, 2021). Other propaganda revolved around assertions that NATO and Ukraine were developing biological weapons specifically targeting Russia, alleged assassinations and sabotage attempts, and the propagation of narratives suggesting overwhelming local support for Russian "liberation" in the affected regions (Paul, 2022).

In January 2022, the disinformation campaigns orchestrated by the Russian authorities had multiple objectives. One of their goals was to exploit "wedge issues" to create discord and division among Western nations, ultimately undermining their support for Ukraine. The dissemination of disinformation aimed to counter the narratives promoted by NATO. In addition, Russian media frequently accuses Ukrainian forces of being incapable to use military weapons supplied by Western partners. Following the invasion, Russian disinformation has also sought to convince its audience that the Ukrainians are bombing their infrastructure to discredit Russia in the eyes of the world. This strategy dubbed

"deny, deflect, distract" is aimed to establish “plausible deniability for any human rights violations committed by Russian forces and to construct a justification for further military intervention in Ukraine” (Zabjek, 2023). Concerning this, Facebook discovered a Russian campaign involving the use of fake accounts and attempted hacking of prominent Ukrainian individuals' accounts. There have also been reports of Russian government employees being paid to search for "organic content" generated in support of the Kremlin by real users (Dwoskin & Zakrzewski, 2022). In addition, they ensure that these posts align with platform guidelines and then amplify their reach. Researchers have identified multiple troll farms operated by the IRA that employ spamming tactics, flooding critics of the Kremlin with comments promoting Putin and advocating for war (Booth, 2022).

Before the February 24 invasion, intensive cyberattacks also targeted Ukrainian entities. According to Microsoft, many groups linked to Russian security agencies have started planning a military invasion in 2021. These individuals, suspected of being Russian cyber agents, managed to gain access to the networks of several Ukrainian energy and IT companies in late 2021. As a result, in 2022, some of these targeted entities got infected with harmful computer viruses, resulting in data destruction and computer system disablement. Researchers also discovered a deadly Spyware propagating in Ukraine in January, called “WhisperGate”. As Russian forces moved into eastern Ukraine in the early hours of February 24, a huge cyberattack disabled tens of thousands of satellite internet modems in Ukraine and Europe. This attack, which targeted a network run by the American satellite company Viasat, caused substantial communications disruption at the start of the conflict (Pearson & Bing, 2022).

On February 24, 2022, Russian President Vladimir Putin delivered a televised address titled "On Conducting a Special Military Operation" (*роведении сеиално военно ераии*), announcing the Russian invasion of Ukraine (Novayagazeta, 2022). The invasion of Ukraine began at dawn with the

deployment of infantry units, armoured vehicles, and air support in Eastern Ukraine. This was supported by missile attacks across Ukraine (Lister *et al*, 2022). The Kremlin also used its proxies for this intervention. On September 30, 2022, amidst the ongoing invasion of Ukraine, Russia made a unilateral proclamation declaring the annexation of four Ukrainian oblasts: Donetsk, Kherson, Luhansk, and Zaporizhzhia (Al-Jazeera, 2022b). To justify this decision, Russian-installed officials in Ukraine staged fraudulent referendums on the occupied regions. However, analysts widely regarded these referendums as illegitimate (Walker, 2022) Because of questions about their impartiality, openness, and adherence to international norms, they were often referred to as sham referendums (Travelyan, 2022). Specific limits and borders for the annexed regions, on the other hand, could not be determined, since none of the oblasts were totally under Russian administration at the time of the announcement or after (Beabien *et al*, 2022).

Following what began in the Donbas, and modelled on Georgia and Crimea, Moscow used a variety of instruments, including the creation of a narrative far removed from reality, and the presence of proxies, to create a pretext for military action. While initially focusing on proxies and covert actions, the result was an overt and conventional intervention.

4.4. Conclusion

In February 2013, just over a year before Russia occupied Ukraine, General Gerasimov outlined a framework for hybrid warfare, which included not only traditional military tactics but also non-military approaches. However, he also recognised the importance of covert military operations, placing the armed intervention itself as the climax. This nevertheless was to be preceded by extensive preparations aimed at creating unrest and exerting influence on sub-state actors (Gressel, 2015: 6). Following the outbreak of the Ukrainian conflict, Gerasimov's analysis was interpreted as a model for Russian activities in Crimea and, later, the Donbas region (Minasyan, 2015). Although the Gerasimov

doctrine referred to what Russia perceived as Western hybridity, there are clear parallels in Russia's actions against its neighbours. As the concepts of NGW and NLW show, the cases analysed here demonstrate that while Russia uses a variety of non-military means of power are used, their success is dependent on conventional ones (Monaghan, 2015: 68).

This analysis provides a model of how Russia applies hybrid warfare. We can observe that when Russia uses hybrid tools, the aim is to create a rationale and thus gain complete control over the enemy in the economic, social, and political spheres, and, if possible, military spheres. The aim is to position itself in a position of strength over time while weakening and undermining the legitimacy of the rival state. This leverage gives the Kremlin influence, as well as the power to dictate new norms. This model is based on the creation of justifications, or *casus belli*, which allow direct intervention. By laying the groundwork for conflict, Russia engages in armed intervention, and while proxies are favoured, the plan always considers overt or covert action. The case of Georgia serves as a template in which Russia creates the necessary conditions for intervention. We can therefore deduce that Russia engages in hybridity to create a direct conflict that gives it an excuse to act.

5. Case Study: China

This chapter aims to provide a comprehensive understanding of the complexity of China's hybrid warfare strategy by separately examining its military and unconventional aspects. As previously noted, the sub-cases selected for analysis are Chinese actions in the ESCS. The objective is to perform an in-depth analysis of China´s hybrid approach and its implications on regional and global security dynamics. By separating the military and unconventional aspects, we can better understand the complex nature of China's hybrid strategy.

5.1. China and Hybrid Warfare: An Introduction

China's foreign policy has traditionally relied heavily on economic leverage and "soft power" diplomacy to project power (Raska, 2015: 1). In recent years, however, Beijing has undergone a policy shift, reorienting its policies toward information warfare, political operations, cyber warfare and the use of state-controlled proxies and armed forces. With extensive experience in unconventional warfare dating back to Sun Tzu's The Art of War, China has become a key player in the use of hybrid warfare strategies. China is taking on a crucial role in several areas, most notably in the ESCS (Miracola, 2018).

In the last decade, China has embraced a noteworthy non-conventional doctrine that has sparked frequent discussions about the employment of hybrid methods and their implications. As previously discussed in the literature chapter, this aspect has garnered significant attention, particularly in the United States, following the release of "Unrestricted Warfare: China's Master Plan to Destroy America" in 1999. The book, authored by Qiao Liang, a senior air force colonel in the People's Liberation Army, and Wang Xiangsui, another senior colonel, caused a great deal of controversy due to the sensationalist addition of "destroy America" to the title for its US publication in 2004 (Liang & Wang, 1999). Similar to the Gerasimov note, this book was understood as a new "military policy", even though it was intended to outline a defensive approach.

"Unrestricted Warfare", or “war beyond limits”, can be considered the PLA´s guidebook to asymmetric warfare, which can be understood as an updated version of Sun Tzu's "Art of War" (Escobar, 2018). The success of hybrid warfare hinges on its ability to operate not only within the military realm but also at the diplomatic and political levels. In this regard, China recognized the importance of non-military aspects and issued the "Political Work Guidelines of the People's Liberation Army" in 2003. This document outlines the application of the theory of the "three warfares" (*san zhong zhanfa*), psychological, opinion, and legal warfare, during both peacetime and wartime operations (Escobar, 2018).

However, while China focuses on the more civilian aspect, it has not forgotten the importance of the military aspect of its hybrid practices. China has therefore made significant advancements in its military capabilities in recent years, particularly in the maritime aspect. China´s maritime strategies have focused on strengthening the People's Liberation Army Navy (PLAN), through the acquisition of advanced technologies and military capabilities. China's primary objective is to expand its geopolitical influence in the region, PLAN is a powerful tool for asserting its regional dominance. Furthermore, since 2014, China has also heavily relied on the naval militia, known as the "maritime militia" or "little blue men," to pursue its geopolitical goals (Ribera, 2021). The militia's primary function is to harass foreign navies passing through the South China Sea, and it embodies China's hybrid warfare doctrine by combining conventional military operations with unconventional tactics, similar to Russia's "little green men" in Crimea. China employs hybrid warfare at both strategic and tactical levels in the maritime domain. One is the use of the so-called "cabbage tactics", a term coined by Rear Admiral Zhang Zhaozhong of the PLAN, that consists in deploying all maritime forces, both conventional and unconventional, to encircle contested islands (Kazianis, 2013; Slantchev, 2005). The other is the so-called "salami-slicing" strategy, to acquire land gradually and discreetly through non-linear operations (CIMSEC, 2014).

5.1.1. Unrestricted Warfare and Three Warfares

Approximately two decades ago, China realised that to achieve success in hybrid warfare, it is necessary to operate beyond the military realm and engage in diplomatic and political activities. When talking about Chinese hybrid warfare, it is important to pay attention to two theories. The first is “unrestricted warfare”, or “war beyond limits”, a term closer to the literal meaning. The general idea behind this concept is to take the war beyond traditional the military domain or a “modified combined war that goes beyond limits” (*pian zheng shi chao xian zube zban*) (Hoffman, 2007: 22). In this book, the authors examine the strategies a nation like China can employ to defeat a technologically advanced adversary like the United States. The book diverges from traditional approaches that prioritize direct military confrontation and instead delves into alternative methods. For instance, they theorise that political warfare, the utilization of legal tools, commonly referred to as lawfare, and economic leverage circumvent the necessity for direct military action (Commin & Filiol, 2015).

In 2003, the Central Military Commission (CMC) of the PLA sanctioned a comprehensive framework for information operations referred to as the "Three Warfares" (*san zhong zhanfa*). This is the second concept to keep in mind. This conceptual framework comprises three interconnected strategies (Miracola, 2018; Raska, 2015: 1). First, the strategic use of psychological operations, or psychological warfare (*xinli zhan*). This involves military and diplomatic measures aimed at undermining the adversary's will to resist China's foreign policy objectives. Second, the manipulation of media, or opinion warfare (*yulun zhan*). This involves overt and covert media manipulation, including the dissemination of distorted information to influence both domestic and international audiences about the legitimacy of China's foreign policy conduct. Third, legal warfare (*falü zhan*), also known as lawfare. This involves exploiting international norms to achieve China's objectives while simultaneously

undermining the foreign policy goals of other states through international forums. The responsibility for implementing the "Three Warfares" was assigned to the Liaison Department of the PLA's General Political Department (GPD/LD). This department is responsible for a range of political, financial, military, and intelligence operations (Raska, 2015: 1).

5.1.2. Chinese Hybridness

China's doctrine encompasses both conventional and non-conventional practices. The role of the armed forces, particularly the PLAN, constitutes the conventional aspect, while the non-conventional aspect involves a variety of mechanisms and instruments.

This strategic approach is rooted in two key principles of Chinese military strategy: the people's war doctrine (*renmin zhanzheng*) and civil-military fusion (*junmin ronghe*). On the one hand, the People's War doctrine emphasizes the mobilization of the wider population for warfare operations through ideological campaigns, which instil a strong commitment to protecting the sovereignty of the Communist Party. On the other hand, the civil-military fusion, which is closely linked to the people's war doctrine, is a response to the principle of hybrid warfare and involves the acquisition of greater military flexibility through the integration of civilian and military spheres (Miracola, 2018). For instance, over the past two decades, China has made significant advancements in its maritime strategies. This has allowed the PLAN to acquire advanced technologies and military capabilities. With a strong focus on expanding its geopolitical influence in the region, China leverages the PLAN as a powerful tool to assert its regional dominance (Shelbourne, 2021). However, Beijing also recognises the importance of the use of various hybrid mechanisms and instruments.

Over the past decade, China has consistently shifted from conventional operations - such as military clashes with Vietnam in 1974, to unconventional

ones, such as the construction of artificial islands and fishermen's paramilitary operations. The goal is to exert psychological pressure on its adversaries (Miracola, 2018). This involves the use of proxies and state-controlled forces to conduct coercive operations that fall below the threshold of all-out war. Since 2014, China has heavily relied on a maritime militia (*haishang mingbing*), the People's Armed Forces Maritime Militia (PAFMM) in pursuit of its geopolitical objectives. These are also known as the "little blue men" (Kuester, 2016; Ribera, 2021). Based on Hainan Island and disguised as Chinese fishermen, they launch attacks on ships operating in the region, blurring the line between civilian and military personnel based on the situation at hand. This militia, therefore, acts as both "seaborne fortresses" and "light cavalry" (Jakhar, 2019). This militia's primary role is to harass foreign navies (Cordesman & Hwang, 2020). Similar to Russia's "little green men" deployed in Crimea, the Chinese maritime militia embodies China's hybrid warfare doctrine by combining conventional military operations with unconventional tactics (Ribera, 2021).

China is also engaging in information warfare. This involves weaponizing information using propaganda and other forms of influence operations to shape perceptions and manipulate public opinion. To influence public opinion, Beijing has repeatedly used historical narratives presented in the media to support its posture in the South China Sea. Another key element of China's hybrid warfare is the adoption of cyber warfare. This encompasses a range of offensive and defensive cyber capabilities, including hacking, espionage, and sabotage. China has taken a comprehensive approach to it. In particular, and in keeping with its previous revolutionary experiences, the government has supported the formation of cyber warrior units made up of university students and civilians at large (Miracola, 2018).

China is also engaging in diplomatic and legal operations. That is the use of diplomatic and political tools to attain foreign policy goals. This includes the use of the law as a weapon. For example, the 2016 China-Philippines

Scarborough Reef litigation. Despite it ended in favour of the Philippines, it still encouraged Beijing to advocate for reform of the international legal system (Miracola, 2018; Aoi *et al*, 2018: 701).

The following sections show how Beijing applies the three-warfare strategy in critical locations for the advancement of Chinese political and military dominance. By utilizing both conventional and non-conventional practices, China's hybrid doctrine seeks to achieve its strategic objectives through a combination of military force, diplomacy, and other forms of coercion.

5.2. South China Sea

The largest Chinese activity takes place in the South China Sea (SCS). In this area, Beijing has strained relations with its neighbours Vietnam, the Philippines, Malaysia, Indonesia and Brunei. China's strategy in this area is very much based on the use of proxies and illegal island construction (Mann, 2023). The background to the conflict stems from China's disagreement with the 1982 United Nations Convention on the Law of the Sea (UNCLOS) (UN, 1982). Beijing claims territorial rights in the South China Sea using a somewhat vague term adopted in 1947 called the "nine-dashed line" (*Jiǔduànxiàn*). China has mainly asserted its claim through a succession of legal arguments and especially (para)military presence in the region (Mann, 2023).

The first part of China's hybrid strategy in the SCS is the previously mentioned psychological dimension, which involves intimidating neighbouring South China Sea coastal governments. China deploys its military strength in the South China Sea to overwhelm and scare other claimant nations into recognising China's nine-dash line as its sovereign boundary (Carpio, 2021). As tensions escalate with its neighbours, China has resorted to this non-coercive, so-called grey method, of avoiding open conflict by deploying maritime militias. This also allows China to maintain its hegemonic position in the region during times of peace. To illustrate this method, in 2019, the Philippine military identified

the presence of 275 vessels in the Sandy Cay region near Thitu Island (part of the Spratly Islands). This exemplifies the intricacies of Chinese hybrid warfare (Miracola, 2018). According to experts, these militias are employed to achieve strategic goals such as publicising regional claims, conducting reconnaissance operations, and making access to contested areas more difficult. Many of these boats are also equipped with satellite navigation, allowing them to track and send locations while gathering intelligence and reporting it to different sources at sea (Korkmaz, 2020). These actors are controlled by the state and operate in a manner that allows the state to maintain plausible deniability. Beijing believes that by using proxy forces it can achieve its objectives without engaging in direct military confrontation, thereby avoiding the risk of escalation to full-scale conflict (Aoi *et al*, 2018: 702). A 2014 article in China's official military newspaper PLA Daily expressed it clearly: "When they put on camouflage, they qualify as soldiers; when they take off the camouflage, they become law-abiding fishermen" (Jakhar, 2019). An example of these militias is the "Tanmen Maritime Militia Company", especially present in the Paracel and Spratly Islands. These actors are depicted as "brave and patriotic" seafarers who oppose foreign navy ships and coastguard paramilitary organisations in the region. In reality, they act as paramilitaries and follow government instructions (Erickson & Kennedy, 2015). However, any attack on these fishermen strengthens China's narrative of the victimisation of Chinese fishermen in the region, which in turn justifies China's protective actions (Ribera, 2021).

In the maritime domain, China follows a hybrid model at both the strategic and tactical levels. To increase its influence and exercise its will over its neighbours in the SCS, China has adopted various non-linear strategies from Russia and developed its own. Firstly and at the tactical level, China employs the so-called "cabbage tactics", also called "small-stick diplomacy" (Holmes & Yoshihara, 2012). At the same time, China strategically adopts the so-called "salami-slicing" strategy. To start with, cabbage tactics consist of the deployment of all maritime forces, both conventional and unconventional, to encircle contested

islands. The Chinese navy has been reported to use merchant and fishing vessels to frighten and encircle foreign warships near these constructed islands (Korkmaz, 2020; Schnaufer, 2017). This comprehensive blockade aims to restrict access and exit points, ultimately weakening the targeted islands (Konishi, 2018). This move is what experts have called "A2/AD" (Anti-Access/Area Denial) (Mishra, 2021). China views the deployment of fishing boats as a military structure as a less controversial approach to accomplishing its strategic goal of regional hegemony. As a result, it has become a critical tool for China to protect its regional interests while avoiding international penalties (Korkmaz, 2020).

Several examples illustrate this tactic. The first example occurred in April 2012 with the dispute with the Philippines over Scarborough Shoal (Jakhar, 2019; Pascual, 2019). On April 8th, a Philippine Navy surveillance plane detected eight Chinese fishing vessels anchored in the shoal's waters. On the same day, the Philippine Navy despatched the *BRP Gregorio del Pilar* to inspect the area and confirm the presence of the fishing vessels and their continuous activity. The ship assessed the fishing vessels' catch two days later, and discovered during the inspection, illegally obtained corals, giant clams, and live sharks aboard the first vessel they entered. When the BRP attempted to apprehend the Chinese fisherman, they were blocked by Chinese maritime surveillance ships. As the reef was surrounded by Chinese naval and paramilitary vessels, the vessel eventually withdrew (Jakhar, 2019; Holmes and Yoshihara, 2012, Santos, 2012). Other similar events have happened in the Spratly Islands. In March 2014, in the Second Thomas Shoal (Ayungin Island), the Chinese Coast Guard blocked two Philippine Navy civilian vessels from exchanging personnel and delivering supplies to *BRP Sierra Madre.* The ship acts as an outpost and provides a military presence in the area. As a consequence, supplies had to be airdropped to the garrison three days later (Inquirer, 2014; Green *et al*, 2017). In 2021, the Philippines confirmed around 220 Chinese fishing vessels anchored in a military-like formation within the Spratly Islands' exclusive economic zone

(EEZ). Despite their protests, the Philippines could not remove the Chinese fishing vessels on their own (Sakamoto, 2021; Mishra, 2021). That same year, China engaged in a similar practice against Vietnam in Paracel Islands. This is known as the "China-Vietnam oil rig crisis", or the "Hai Yang Shi You 981 standoff". According to Chinese state media, Chinese and Vietnamese military warships crashed near the islands in early May 2014 as Hanoi attempted to thwart a Chinese oil rig from establishing itself in the area (Korkmaz, 2020; Ng, 2014). On May 26, a Vietnamese fishing vessel sunk near an oil rig after clashing with a Chinese vessel. Although both sides blame each other, video footage provided by Vietnam showed a Chinese vessel smashing into their ship before it sank (Bloomberg, 2014). China has taken a similar strategy to Indonesia, specifically on the Natuna Islands. In 2019, Chinese fishing vessels, escorted by Chinese coastguard vessels, expanded their unlawful activity within the EEZ (Fadli, 2019). These cases illustrate a trend in which China is trying and even succeeding in restricting access to various islands and atolls.

Beijing is also engaged in a so-called "salami-slicing" strategy, which involves progressively and discretely acquiring land using non-linear methods (Kuester, 2016; CIMSEC, 2014). Notably, the construction of artificial islands exemplifies this approach, allowing China to gain control over contested territories without provoking a large-scale military conflict (Branislav, 2005). According to Malcolm Davis, a senior analyst at the Australian Strategic Policy Institute (ASPI), China has attempted to claim the entire South China Sea region as its territorial waters, without provoking a *casus belli* (Mann, 2023). There is, therefore, an attempt to confuse the targeted party to avoid military responses, reducing the possibility of escalation and thus avoiding it (Korkmaz, 2020; Aoi *et al*, 2018: 702). Despite being located in areas with competing claims by numerous countries or in international waters, some of these islands have been militarized, including the construction of airstrips. As a result, China has been able to threaten its neighbours and force them to renounce their claims (Mann, 2023). In other words, Beijing can carry out these operations by taking

advantage of regional relationships and the limited ability or willingness of other countries to directly challenge its actions. The construction of these islands falls into a grey area within international law and can be considered a non-linear method (Schnaufer, 2017).

The main example of this tactic is the construction of the so-called “Great Wall of Sand” in the Spratly Islands. At the end of 2013, China conducted large-scale land reclamation operations at seven sites to strengthen its territorial claims in the area (AP, 2015). Aerial images have not only revealed these artificial islands, but also structures on Mischief Reef, Gaven Reefs, Subi Reef, Cuarteron Reef, Fiery Cross Reef, and Hughes Reef, which account for six of China's 15 Spratly Islands. Admiral John C. Aquilino, commander of the United States Indo-Pacific Command, stated that by 2022, China had fully militarised at least three artificial islands with air and naval bases, including Mischief Reef, Subi Reef, and Fiery Cross. All of which Beijing claims "historical rights" over (RFA, 2022; Carpio, 2021). Fiery Cross Reef appears to be the most developed base, which includes barracks, hangars, radars, and a fully operational airfield (Sciutto, 2015). In addition, photographs released in January 2016 showed China reclaiming territory and building military facilities in the Paracels, specifically on Duncan Island, North Island, and Tree Island. This may lead to parallels between the current work and China's earlier large-scale development in the Spratlys (Lee, 2016). According to Chinese state media, approximately “5,000 officers and soldiers” are now stationed on the South China Sea islands and reefs that China occupies, indicating an increasing population (RFA, 2022).

To support its maritime operations, Beijing has also begun carrying out cyber attacks against its rivals in the region. China has especially targeted the Philippines in recent years, mainly due to its perceived proximity to the US. In 2019 reports found that a Chinese cyber espionage group called “Advanced Persistent Threat Group 10” (APT10) released two malicious software variants targeting the government and business organisations. These attacks are

comparable to Chinese cyber espionage activities performed in August 2016 under the "NanHaiShu" or Remote Access Trojan programme in the SCS. During this operation, hackers obtained sensitive material from the Department of Justice of the Philippines and a large international law firm that represented nation-states at the Permanent Court of Arbitration (PCA) in The Hague (Manantan, 2019). A 2023 report also uncovered a phishing campaign in the SCS. It was aimed at offshore energy corporations working in Malaysia's Kasawari gas field off the coast of Sarawak. Companies involved received emails with links to what seemed to be real Australian news websites. Clicking on the URLs, on the other hand, launched ScanBox malware, which allowed the hackers to control the victim's machine, including the ability to monitor keystrokes and browser activity. The report's authors concluded with "moderate confidence" that the cyber espionage outfit responsible for the attack was TA423/Red Ladon or APT40, which is based in Hainan and has ties to China's Ministry of State Security (Subramanian, 2023). The intention behind these attacks is for Chinese state-sponsored hackers to gain access to sensitive material that would allow them to identify possible actions aimed at countering China's grey zone activities. By obtaining key communications data for intelligence purposes, China can potentially reinforce its existing grey zone policy.

At the same time, China has launched a legal and propaganda campaign in which Beijing maintains its historic claim to the SCS. China asserted in its Position Paper filed to the Arbitral Tribunal in The Hague that "Chinese activities in the South China Sea date back over 2,000 years". Beijing also argued that they were the first country to identify, explore, and use the resources of the SCS Islands, as well as the first to exercise continuous sovereignty over them (PCA Case Nº2013-19, 2016). This narrative seeks to establish and legitimise China's historical rights over the region. At the same time, China legally claims that its sovereign rights to the South China Sea existed before the UNCLOS. China maintains that said convention cannot be used to violate these

rights because it believes it cannot be applied retroactively. This argument is part of China's larger attempt in international law to promote "Chinese characteristics" that serve its national interests (Carpio, 2021).

Overall, China's evolving maritime doctrine, coupled with its hybrid warfare strategies, demonstrates its determination to extend its influence and control in the SCS region (Patalano, 2018a: 831). China believes that a fishing boat militia organisation can be a less contentious means of advancing the strategic goal of regional hegemony. As a result, Beijing considers this a critical instrument for avoiding international sanctions while also protecting regional interests. Therefore, political and military authorities prefer to use these proxies with the support of the navy. This tactic is the main dimension of China's hybrid warfare, which is supported by other methods such as cyber warfare that facilitates their operation, as well as propaganda and lawfare to support their actions.

5.3. East China Sea

China's main rivals in the East China Sea (ECS) are Japan and Taiwan (Republic of China) and to a lesser extent South Korea. However, this study omits Taiwan given the particularity of its case. The main issue with Japan is the disagreement over the boundaries of their respective EEZs (Sina, 2012). China's ECS policy is very similar to that employed in the SCS. However, it is less active in this region than in the previous one.

One of China´s main goals in the ECS is to seize control of Japan's Senkaku Islands (in Chinese Diaoyu Islands) and to establish authority over its "extended continental shelf beyond 200 nautical miles from the Chinese baseline" (UN, n/d). Most of the activity is located in the Miyako Strait. Initially, the Chinese authorities adopted a tactic based on sporadic incursions into the islands. For instance, on September 8, 2010, a Chinese fishing boat collided with two Japanese Coast Guard ships. The Japanese Coast Guard (JCG) captured the captain of the Chinese vessel and fourteen crew members (Kormaz, 2020). In

2013, Japanese authorities again denounced the intrusion of four Chinese coast guard vessels into the area around the islands (Kazianis, 2013). However, this tactic soon changed to a regular deployment of assets into the territorial seas of the Senkaku Islands. Beijing began using the China Coast Guard (CCG) in conjunction with fishermen to expand its incursions into Japanese territorial seas while harassing Japanese fishing boats within Japan's EEZs (Donovan, 2022; Tsuruoka, 2021). Although in 2014, the CCG had considerably reduced patrols in the Senkaku Islands' territorial waters, by 2016 Chinese fishermen, the CCG, and other vessels were entering the territorial seas around the islands virtually daily (Fravel & Johnston, 2014; Obe, 2016). For instance, according to Japanese Ministry of Foreign Affairs (MOFA-Japan) data, between August 5 and August 9, 2016, the number of confirmed Chinese fishing vessels instructed to leave Japanese territorial waters increased by more than 200% (MOFA, 2016: 1). The aim of this new approach was not only to challenge Japan's sovereignty claims over the islands through administrative control, but also to demonstrate that these claims were unfounded by normalising Chinese law enforcement within the islands' territorial waters (Patalano, 2020b). Furthermore, this was intended to normalise China's presence in the islands. China not only ignored Tokyo's repeated appeals for Beijing to stop its provocations, but instead, it asserted its sovereign rights (Kuester, 2016).

In July 2020, China's strategy shifted again from normalising its presence to exercising control. On the 5th of that month, two Chinese coastguard vessels set a new record by spending 39 hours and 23 minutes within the territorial seas of the Senkaku Islands. This was the longest period that Chinese surface vessels have spent within the 12-nautical-mile boundary, and therefore it was not a mere "incursion". On the contrary, and as the Chinese authorities claimed, it was a “routine” law enforcement patrol in sovereign waters (Patalano, 2020b). That same month, the JCG claimed that Chinese ships had been sighted in the territorial waters of the Senkaku Islands for a record number of consecutive days; 67 in only one day (Lendon, 2020). In June 2021, Chinese ships were

present in the waters surrounding the Senkaku Islands for a record-breaking 112 days. This broke the previous record of 111 consecutive days set between April and August 2020. In 2022, the MOFA-Japan identified over 200 Chinese fishing vessels operating contiguous area of the Senkaku Islands (Donovan, 2022). On March 30, 2023, the Japanese Coast Guard denounced once again that Chinese vessels invaded once again Japanese territorial waters near the islands of Minamikojima and Uotsurijima. The ships stayed in the area for 80 hours and 36 minutes (NHK, 2023). Beijing's goal, according to James Brown, an associate professor of political science at Temple University in Tokyo, is to establish and demonstrate effective control over the Senkaku Islands. Similar to this view, Zhou Yongsheng, a professor at China Foreign Affairs University's Institute of International Relations, argues that China considers sending ships to patrol and monitor the waters around the islands an act of national sovereignty (Lendon, 2022).

As in the SCS, China disagrees over how to implement the UNCLOS, which has been ratified by both countries. China defends its implementation in light of the natural extent of its continental shelf, arguing that its EEZ should extend to the Okinawa Trench (Koo, 2009). Already in 2012, China submitted a complaint to the UN under UNCLOS regarding “the outer limits of the continental shelf”. At the time, State Oceanic Administration (SOA) officials stated that China's proposal to demarcate the outer limits of its continental shelf in the East China Sea is based on sound scientific and legal grounds (Sina, 2012). Since then, China has been engaged in a legal battle for ownership of the area. This is coupled with a strong and constant discourse from the Chinese government, which has always cited the importance of territory and territorial nationalism. Thus, government officials mobilise domestic support under the narrative that the government is defending national territory. This, in turn, opens up other possibilities, such as the landing of Chinese activists on the disputed islands in 2004 (Wiegand, 2009: 185-186).

Finally, once again observed in the SCS, China has also been involved, albeit to a more limited extent, in cyber-warfare in this region. According to the Japan National Police Association, in 2012, 19 Japanese websites were targeted in purported Chinese cyberattacks. These attacks are believed to be related to a territorial dispute between Japan and China over the ECS islands. The attacks are intended to disrupt the websites' operations and perhaps steal critical data (Liau, 2012). From this point onwards, cyber operations in the region are clouded. While it is assumed that China continues to exert pressure in this area, no relevant activity has been discovered or made public.

The case of the ESC once again demonstrates Beijing's determination to extend its influence and control in the region. China is again applying a method based on the asymmetric use of maritime means, giving special power to fishing boat militias. This approach is certainly aggressive, but less confrontational in advancing the strategic goal of regional hegemony. As such, Beijing sees it as a key instrument to avoid international sanctions while protecting regional interests (Mumford & Carlucci, 2022). This tactic, along with propaganda and lawfare, is the main dimension of China's 'hybrid' warfare in the region.

5.4. Conclusion

Overall, China prefers to avoid direct military confrontation. To this end, it deploys a range of asymmetric capabilities against which its rivals have little to do. However, this variety of instruments raises questions about its legitimacy in achieving its strategic objectives. To achieve this, China follows a model that dictates that Beijing act within the limits of the other country's permission. If that actor is assertive and combative, China will not continue its activities. However, if Beijing perceives weakness or permissiveness towards its activities, it will continue its actions. In the case of the SCS, China pushes its regional rivals until it gets a foothold in an area. It then settles before the counterpart has a chance to do anything. In the ECS, China follows a similar model of maritime pressure, although here its effectiveness is more limited. Added to this are legal

actions and propaganda that reinforce Beijing´s discourse and objectives, in an attempt to give legitimacy to their actions. Beijing is, therefore, able to achieve its objectives while reducing the likelihood of retaliatory measures from its opponents by utilising civil-military tools that allow it to move in the grey zone (Aoi *et al*, 2018: 709).

6. Comparative Analysis

This chapter will provide a comparative analysis of the Chinese and Russian uses of hybrid warfare, examining the similarities and differences in their approaches, objectives, and outcomes. By examining the strategies and tactics employed by both actors, this chapter aims to provide a deeper understanding of the changing nature of modern conflict and the challenges these countries pose to regional stability and security. This chapter concludes with a discussion of the meaning, importance, and relevance of the results obtained in this study.

6.1. Overall Findings on Russian and Chinese Hybrid Strategies

Similarities

On the one hand, we observe that the two countries use similar hybrid tools. Russia and China use a combination of kinetic methods to obscure the role of the state in their activities. These are mostly the joint use of state military forces with irregular actors, paramilitaries, and militias. In the Russian case, Moscow combines personnel and materiel from the Russian Armed Forces, favouring the use of special forces that provide great mobility and speed. This is coupled with the use of "popular" militias such as the People's Militia of the DPR and People's Militia of the LPR, as well as paramilitaries such as Wagner. These entities are equipped, trained, and directed directly by Moscow. In the case of China, we also see a combination of state forces such as the PLAN and the GCC, along with the PAFMM and fishing fleets. This is illustrated by the "salami-slicing" strategy and “cabbage tactics”. In both cases, the use of these tactics allows them to take responsibility away from each other and detract from their opponents' ability to respond.

At the non-kinetic level, the two countries reflect similar attitudes and processes. Both Russia and China reinforce their activities in the informational sphere through disinformation, misinformation, and propaganda campaigns. By

creating alternative narratives, they alter reality, which strengthens their claims, secures support at home, and reinforces their image in the rest of the world. This can also limit external interference. In addition, both countries use cyber warfare to support their kinetic campaigns, to create confusion, fear, and pressure. On the other hand, both countries use hybrid methods for similar reasons. Both Russia and China have a specific goal regionally. This is territorial expansion. This derives from political, economic, social, and historical aspirations. We can observe parallelisms in that both seek to expand their sphere of influence and exert some kind of control in their neighbourhoods. However, the presence of international law means they cannot act directly and openly. This creates a need for caution on the part of both elites. Hence the use of means that allow navigation through the grey zone.

Differences

However, following the hypothesis of this study, the use of hybrid methods by Russia and China changes substantially in terms of strategic objectives. In the case of Russia's hybrid design, we can observe several critical steps involved. The first step is to sow division and disagreement in the political and social aspects of a target country. For this, the Kremlin favours political and information campaigns. These serve to destabilise said country which provides the groundwork for conflict. As we have seen in the cases of Georgia, Crimea, and the Donbas, this starts with supporting opposition groups and parties to weaken the government. This strategy always entails spreading seeds of disaffection among the country's minority Russian community. To support this further, Russia creates, finances, and empowers proxies and pro-Russian actors within the target country to further its goals. These campaigns focus on building narratives that range from accusing the government of being tyrannical, of attacking said Russian minorities, as well as accusations of fascism and NATO threat among others. This is done by distributing misinformation and propaganda to sway public opinion, not only at home but internationally, in

favour of Russian intervention. This is facilitated by state media platforms such as RIA, RT or Sputnik, and the presence of trolls and bots on social media. Added to this are "passportisation" campaigns that reinforce these discourses and give a "legal" character to a possible intervention. This is reinforced by the holding of dubious post-invasion referendums. As a result, this narrative and actions are used to justify a Russian military intervention on behalf of a Russian minority, and the fight against fascism or NATO. To further complicate matters, cyber operations are used to heighten tensions and impede national responses. This offensive strategy allows Russia to weaken its neighbours and create favourable conditions for potential military actions. Thus, by engaging in hybrid warfare, Russia achieves two goals at the same time. For starters, if effective, it allows Russia to wield power without resorting to overt confrontation, as seen by its actions in Crimea. If, however, this strategy fails, Russia is prepared to intervene militarily, as demonstrated in the examples of Georgia, the Donbas, and the subsequent invasion of Ukraine. Regardless of the outcome, Russia is certain to get militarily involved; the difference is the requirement to use overt warfare. The Kremlin, therefore, uses a hybrid approach to legitimise, at home and abroad, both overt and covert military operations on foreign territory. All this creates a path for Russia to intervene indirectly or directly to achieve its goals. In the end, and as shown with our sub-cases, Russia resorts to military intervention in one way or another, to achieve its objectives.

On the other hand, China has long favoured subtle and protracted methods of achieving its goals. Unlike Russia, and as the sub-cases analysed illustrate, China does not seek confrontation. China´s application reminds us of the concept of *Lingchi*, or “death by a thousand cuts”. Beijing's strategy is to go small, as illustrated by the salami-slicing strategy. By using maritime militias and fishermen in the ESCS, China avoids direct confrontation with other countries. Again, this allows China to move into the grey zone. At the same time, to reinforce these actors, Beijing often supports them with government vessels. The presence of these vessels prevents rival ships from directly

engaging these militias. Firstly, due to fear of retaliation, and secondly, because it would constitute a direct attack on China, which could lead to a declaration of war. At the same time, cabbage tactics confuse opponents and reduce the chances of a response. This move consists of a comprehensive blockade that aims to restrict access and exit points, ultimately weakening the targeted islands. These strategies also allow Beijing to test its opponent's will. If it shows strength, China withdraws. This was the case during the Second Thomas Shoal episode where, despite the Chinese blockade of Philippine supplies, the resilience of the latter allowed them to maintain their sovereignty over the island. On the other hand, if the opponent appears weak and confused, it will move on and settle down as soon as possible. This is clearly illustrated by the case of Scarborough Shoal. The Philippines' inability to respond to China´s blockade to Beijing's *de facto* appropriation of the island. Once this is done, Beijing builds artificial islands, as illustrated by the "great wall of sand", and builds bases to prevent its rivals from recapturing them. This is illustrated by Chinese activity in the Spratlys, where in the last years it has militarized up to three artificial islands. This means that China slowly but surely advances its objectives, with small actions, while avoiding possible responses by its rivals. Beijing, therefore, makes sure to minimize the possibility of creating *casus belli*. Unlike Russia, China employs few clandestine measures. Instead, Beijing actively utilizes other non-kinetic measures such as diplomacy and "lawfare". In addition to the kinetic pressure exerted in both seas, China legally pressures its rivals, which reinforces its claims. These hybrid techniques enable China to wield power and achieve its goals without resorting to direct military action, decreasing the risk of a conflict.

6.2. Discussion

Hybrid warfare has become an increasingly prevalent strategy in modern conflict, with both China and Russia employing it to achieve their strategic goals. This section explores the meaning, significance, and relevance of the

findings of this paper. This section will also assess the research's practical implications and prospective uses in real-world scenarios. It will also acknowledge the limitations of the findings, and their ramifications and contributions.

As we can observe, while both countries employ similar hybrid methods to expand their influence, this analysis demonstrates that they are used in different ways and for different objectives. On the one hand, Russia´s hybrid strategy focuses on weakening using various means, to establish an advantageous position before resorting to overt military action. This strategy entails weaponizing the mind and morals to shape the narrative and create justifications and excuses for involvement. China, on the other hand, does not use hybrid methods as a preparation for armed conflict. On the contrary, Beijing engages in small provocations that, on their own, would not justify military action, but are intended to add up over time to create a larger consequence that favours China. This strategy consists of the weaponization of time and perception, allowing China to achieve its goals in a way that would have been difficult or unlawful to do in a single, large move. These results align with my hypothesis as they demonstrate a divergence in behaviour and objectives between both countries. The findings also align with observations made by various experts and scholars, as we can discern differences in the applicability of hybrid methods.

However, it is possible to conceive of an alternative explanation for Russia to that shown in this study. We could consider that Russia uses hybrid tools depending on the situation at hand and adapts them to the intended goal. This would mean that Russia does not systematically seek direct conflict but adapts its actions to the need of the moment. Despite all the cases analysed showing a pattern of creating the foundations for a conflict that ends in military intervention, it is possible that this is not the main intention, but that the plan to intervene indirectly went wrong in some cases. Russia's use of hybrid warfare

may be similar to China's, in that it seeks to avoid direct conflict, but is still more offensive in the sense that Moscow favours the use of proxies and other non-kinetic tools, to create frozen conflicts rather than outright takeovers of territory. In the case of the Donbas, the poor performance of its proxies may have forced Russia to improvise and intervene directly to prevent Ukraine´s victory. This could also have occurred in Georgia, although in this case, it was the Russian proxies that initiated the hostilities. In the case of Crimea, where there is no overt intervention, Russia did not use proxies but unidentified soldiers. Thus, while Russia's strategy follows a clear pattern of inciting hostilities that justify military intervention, it would be interesting to study whether, in reality, it is less elaborate than concluded and instead more flexible. That is, the use of hybrid methods and their objective depends on the situation and the needs, as well as the response of the opponent.

By examining the strategies and tactics employed by both actors, this paper provides a deeper understanding of the evolving nature of modern conflict and the challenges it poses to regional stability, security, and balance of power. While the paper focuses on the differences between Russian and Chinese hybrid warfare techniques, the results demonstrate that these methods and the strategies tailored to both countries pose a substantial risk to regional peace and security. This study demonstrates that the hybrid strategies analysed are used to undermine the interests of other countries in the region and provoke tension and conflict. Likewise, we see a constant and systematic use of these methods by both countries, which they can extrapolate to other scenarios, as well as copied by other actors. This study, therefore, lays the groundwork for future research on the subject, as well as providing a basis for more in-depth research. Finally, the results show a tactical-strategic framework that can be used by countries and organisations to create contingency plans to defend themselves in future conflicts.

As explained in the methodology chapter, this study is limited by a series of constraints, including limited time and lack of funding. The limited access to information is particularly impactful, given the sensitive nature of the topic and the countries under study. Additionally, this study is desk-based, which also limits its scope. Lastly, the term hybrid warfare complicates the study due to its ambiguity and the ongoing debates surrounding it. However, this analysis benefits from the fact that the method chosen, that is, qualitative, helps to mitigate these limitations. Nevertheless and considering the potential for future research, several recommendations could be provided given additional time and sufficient resources. To mitigate Western bias and gain a more direct understanding of the behaviour of the two nations, future research would greatly benefit from delving deeper into sources originating from Russian and Chinese perspectives. This implies the need for advanced knowledge of those languages as well as access to local sources. Obtaining primary sources from these countries, such as surveys or interviews with relevant individuals, would also enhance future research on this topic. Such efforts would enable a more comprehensive and unbiased analysis, providing valuable insights into the subject matter.

7. Conclusion

In conclusion, and following the observed gaps in the existing literature, this paper proposes a novel theory to answer the question of how Russia and China use hybrid warfare for strategic purposes, as well as how they differ in their application. By analysing the use of hybrid methods by Russia and China, this thesis has shown how and in what ways both countries use them when pursuing strategic objectives. Building on prior works and merging the literature on hybrid warfare and Russia and China, this research found that there is a divergence in the use and objectives of hybrid tools between both actors. Using different subcases, this study has demonstrated a pattern in terms of hybrid action for the two of them. On the one hand, the analysis shows that in its sphere of influence, Russia uses hybrid tactics to create justifications and excuses that allow for direct intervention. This may be covert or overt, but the main strategy is to incite conflict in the target region. Once the necessary conditions are in place, Moscow uses its conventional power in one way or another to seize power in the area of interest. With the use of hybrid weapons, the Kremlin thus seeks to put itself in a position of power *vis-à-vis* its rival, including delegitimising its adversaries, raising ethnocultural tensions, and creating proxies. Through these methods, Russia secures domestic support, and passivity abroad, as well as a justification. This study has also shown that China uses hybrid tactics to avoid direct conflict. Beijing uses methods that allow it to avoid responsibility but at the same time facilitates its objectives. China acts swiftly and decisively but reserves the right to withdraw if its opponent poses a challenge. The combination of conventional and especially unconventional methods, such as militias, allows Beijing to put pressure on its neighbours without favouring a *casus belli*. Once the objective is achieved, China settles in the area to impede an efficient response. This paper sought to analyse how both actors strategically exploit these methods to achieve their geopolitical objectives. The results are therefore in line with my expectations.

However, further research is needed to ascertain whether, as noted in the discussion, Russia's behaviour is more reliant on improvisation than on a predetermined strategy. Based on this study, future research would benefit from diving more into whether the role and use of conventional forces are dependent on the success of unconventional forces such as proxies. It is also worth investigating further whether the Kremlin favours the creation of frozen conflicts, rather than direct intervention in neighbouring areas. Despite its possible shortcomings, this thesis provides useful information to researchers in the field of hybrid warfare, specifically Russia and China. Therefore, this paper can be used as the basis for further analysis. For starters, it offers a useful selection of related material. The works chosen for this study are the most influential in the domain and can be used in future research. The same applies to online articles and reports, which form a useful body of references for future research on the subject, especially from a historical point of view. Second, this paper provides numerous examples and cases that can be used in future research. Furthermore, this paper acknowledges an important gap in the literature, that is, the lack of emphasis on how is hybrid warfare used strategically by Russia and China. This gap is addressed following a dichotomous approach that is, the use of hybrid methods to create and avoid conflict. Finally, this thesis provides a greater understanding of the evolving nature of modern conflict and the problems it brings to regional stability, security, and power balance. While this study focuses on the distinctions between Russian and Chinese hybrid warfare approaches, the findings show that these methods, as well as the policies adapted to both countries, constitute a significant risk to regional peace and security. Mainly because as the paper shows, these tactics have proven somehow effective for both actors at least in the short term. Similarly, we observe both countries use these strategies on a consistent and systematic basis. Consequently, we can observe a certain pattern or template from both actors, which can be used in other contexts and adopted by other parties. The findings, therefore, provide a tactical-strategic framework that countries and

organisations can utilise to develop contingency plans to protect themselves in future conflicts. In summary, this thesis establishes the basis for future research on the subject thesis offering a foundation for additional in-depth investigation. Moreover, it also offers alternatives and identifies potential gaps that can be exploited to produce new works, modify, or expand both fields - in hybrid warfare and global power strategic thinking.

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