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Special Operations Forces in an era of returning great power competition

An analysis of the Russian and Chinese case

Abstract

Special Operations Forces (SOF) play a crucial role in geopolitical competition in a context of re-emerging multipolarity. This article analyses how states' global ambitions drive them to develop SOFs in line with their foreign and defence policy, following neoclassical realist theory. As great power rivalry intensifies, it is expected that global players such as China will seek to strengthen their SOFs to compete with their adversaries. This paper argues that economic capacity is not the only determining factor in SOF development, using Iran as an example, a country that has established a globally competent SOF programme despite limited resources. In fact, China, despite its considerable resources, has not yet developed a globally competent SOF programme, and this could be attributed to endogenous and exogenous factors. Through case studies of Iran, Russia and China, this article examines the factors that influence state decision-making regarding the development and use of SOFs, highlighting the discrepancy between available resources and the actual development of these forces.

Keywords

Special Operations Forces, Great Power Competition, Global Players, China, Russia.

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1. Introduction

Special Operations Forces (SOF) play a critical role in the foreign and security policies of many states, especially with the return of Great Power competition in the context of a re-emerging multi-polar world political system. These elite military units, which include Iran's *Quds* Force, Russia's *Sily Spetsial'nykh Operatsiy* (SSO, literally "Special Operations Forces"), and the US Army Special Forces Groups and Navy SEALs, have become one of the leading instruments in some states' foreign and state defence policies. In today's emerging geopolitical landscape, the neoclassical realist approach, as represented by Zbigniew Brzezinski, provides valuable insights into how states use SOFs as a means to project ambition and global power.

With the re-emergence of a multipolar world political system, and with an increasingly assertive China and Russia, where Great Power competition and geopolitical confrontation are increasingly common (Sahakyan, 2023), it is to be expected that Global Players such as China (Brzezinski,1998)[1] will also seek to develop globally competitive special operations forces that are capable of operating in a variety of escalation environments and missions. Globally competitive is used to mean, firstly, SOFs that are capable of operating across the entire spectrum of conflict escalation. This can include Hybrid Warfare scenarios and conflicts in the Grey Zone where Special Operations Forces are key to securing advantages in future escalations or de-escalations. And secondly, globally competitive SOFs also means forces that are capable of successfully carrying out the missions usually attributed to special forces. These include: Direct Action (DA), Special Reconnaissance (SR), Anti-Terrorism (AT), Non-Conventional Warfare (NCW), and Foreign Internal Defence (FID). Finally, globally capable SOFs must be able to operate in different geographical environments, ideally globally, but at the very least in areas where the country of reference has relevant geopolitical interests. This article argues that economic capacity, or even the prospect of a near conflict, are not the only determinants of whether states develop and employ SOFs, as the paradigmatic case of Iran demonstrates. On the other hand, China, with significant economic and organisational capacity, has not yet developed a globally competent SOF programme; this could be attributed to historical experiences, its geopolitical position or other factors, as will be discussed later. As we will see throughout this paper, Chinese SOFs are used to support conventional forces in a local or regional high-intensity conflict, and their range of missions is limited compared to US, Russian, or Iranian SOFs.

SOFs represent a significant concentration of military power that can be used more precisely than other similar assets to achieve foreign policy and defence objectives.

1 Brzezinski, a leading author of neoclassical realism, identifies China as a Global Player, among others. For further information see Brzezinski, Z. (1998). *The Grand Chessboard. American Primacy and its Geostrategic Imperatives*. New York City: Basic Books.

In addition, evolving doctrine and technology make SOFs increasingly effective and usable in a wide range of situations. This paper provides a comparative analysis of the factors that influence states to develop and use SOFs, including case studies from China and Russia. It focuses on states that have not yet developed globally capable SOFs despite having the resources to do so, such as China, using Russia's use of SOFs as a counterexample.

The development of SOFs by states is an important indicator of their global ambitions and their willingness to use military power to advance their foreign policy objectives. This is particularly true in the context of re-emerging multipolarity, where great power competition and geopolitical confrontation are increasingly common. The trend towards increased competition among the major emerging powers has also been exacerbated by globally relevant events, such as the COVID-19 pandemic and conflicts with a global impact such as the war in Ukraine. SOFs, as elite military units, are designed to operate with greater flexibility, agility and precision than conventional military forces, making them an attractive option for states seeking to project power and influence on the world stage, especially when those states are threatened by other major powers that may be developing or employing SOFs themselves.

The case of Russia's use of SOFs in the Caucasus, Syria and Ukraine serves as a powerful example of how SOFs can be used to project power and influence, even in the face of significant military and geopolitical challenges. Russia's ability to use SOFs to achieve its foreign policy goals has been instrumental in re-establishing itself as a major player on the world stage, despite economic, geographic, demographic and conventional military constraints. This has been made possible through a combination of advanced organisational capabilities, sophisticated military doctrine and a willingness to use force when necessary, even in environments where other states would be reluctant to do so. Despite having limited capabilities in many areas, Russia has managed to project power beyond its borders without, until recently, provoking an overt military response from its main geopolitical opponents. Indeed, by leveraging the Grey Zone[2] (Baqués, 2017) and what the West would consider 'Hybrid Warfare'[3], largely through its SOFs, Russia has been remarkably successful in paralysing a coordinated military response from NATO and other opponents, allowing it to consolidate its position and deter threats in the Caucasus and the Middle East, especially in Syria. The "constant deployment" of SOFs through the

2 The Grey Zone refers to the space between war and peace, where the actions of states or non-state actors fall outside the traditional boundaries of conflict. This concept is explored in more depth later in the paper. More information in Baqués, J. (2015). El papel de Rusia en el conflicto de Ucrania:¿ La guerra híbrida de las grandes potencias?. *Revista de estudios en seguridad internacional*, 1(1), pp.41-60. and Baqués, J. (2017). Hacia una definición del concepto Gray Zone (GZ). *Documento de Investigación*, 2(2017), p.26.

3 Hybrid Warfare is a conflict characterised by the use of a mix of conventional and unconventional military capabilities and tactics, as well as non-military means such as diplomacy, propaganda and economic leverage. More information in Bilal, A. (2021). Hybrid Warfare-New Threats, Complexity, and 'Trust' as the Antidote. *NATO Review*, 30.

use of state and para-state tools, such as the Wagner Company[4], has also provided Russia with a wealth of practical experience that can only be matched by US SOFs. This shows that Global Players often seek to engage their SOFs in ongoing operations to develop their capabilities and expertise. This can often be achieved covertly, or at least by maintaining plausible deniability, as in the case of Russia with regard to mercenary companies; this is desirable in order to maintain a low level of escalation ideal for Special Forces Operations (Votel et. al., 2016).

In the case of Iran, the development of a SOF programme with global capabilities is evidence of the importance of SOFs in states' foreign and security policies. It has been possible despite Iran's limited economic resources, and has been fundamental to its ability to project power and influence in the region[5]. According to the World Bank's open data, if measured by Purchasing Power Parity (PPP), Iran's GDP in 2021 would be roughly equivalent to that of Saudi Arabia, or seventeen times lower than that of the United States, or almost nineteen times lower than that of China. If PPP is not used, Iran's GDP is less than half that of Saudi Arabia, almost fifty times less than that of China and more than sixty-four times less than that of the United States[6]. Despite this, it is a Global Player in every sense, competing for power and influence on the world stage[7] (Brzezinski, 1998).

Iran's development of an SOF programme is also testament to the importance of ideological considerations in the development and employment of SOFs, as Iran's religious and political ideology has been a driving force behind its foreign and security policy[8]. Iran's SOFs, in particular its *Quds* Force or *Al-Quds* (literally "Jerusalem Force"), are a key element in its *defa-e-mozaik*, or mosaic defence, which seeks to entangle geopolitical opponents such as Saudi Arabia or Israel in protracted conflicts with *proxy forces* far from Iran's borders[9]. Iran has been remarkably successful in this regard, albeit at the cost of creating or sustaining a series of protracted conflicts in Lebanon, Yemen and Iraq with unpredictable

4 Sukhankin, S. (2019). Russian PMCs in the Syrian civil war: From Slavonic Corps to Wagner group and beyond', in Sukhankin, S., ed. *War by other means*. Washington, DC: Jamestown Foundation.

5 Cordesman, A. H. (2006). *Iran's Support of Hezbollah in Lebanon*. Washington, DC: Center for Strategic and International Studies. and Johnston, T., Lane, M., Casey, A., Williams, H.J., Rhoades, A.L., Sladden, J., Vest, N., Reimer, J.R. and Haberman, R. (2021). Could the Houthis Be the Next Hizballah. *Iranian Proxy Development in Yemen and the Future of the Houthi Movement*. Santa Clara: RAND Corporation.

6 World Bank. (2021). *World Bank Open Data*. [Online] Available at: < https://data.worldbank.org/ >

7 Brzezinski already identifies Iran in his book "The Grand Chessboard" as a geo-strategically active actor, albeit in a limited way. The further development of its assets in countries such as Lebanon and Yemen, and the regional dimension of its conflict with Saudi Arabia, as well as its recent accession to the BRICS group, indicate a desire to be a Global Player. For further information see Brzezinski, Z. (1998). *The Grand Chessboard. American Primacy and its Geostrategic Imperatives*. New York City: Basic Books.

8 Connell, M. (2010). Iran's Military Doctrine. *The Iran Primer*, *11*. and Piotrowski, M. A. (2017). "Mosaic Defence:" Iran's Hybrid Warfare in Syria 2011-2016. *The Polish Quarterly of International Affairs*, 26(3), 18-67.

9 Tabatabai, A.M., Martini, J. and Wasser, B. (2021). *The Iran Threat Network (ITN)*. Washington, DC: RAND Corporation.

outcomes[10]. However, the cost in terms of manpower has been small for the Iranian state, while opponents such as Israel or Saudi Arabia have had to expend considerable energy to deal with threats created or augmented mainly by Iran's main Special Operations Forces, such as Hezbollah and the Houthi Movement[11].

However, as a counterexample, China has yet to develop a globally competent SOF programme beyond elite infantry support for conventional forces, despite its vast economic and organisational resources. This could be attributed to a variety of factors, including historical experience, its geopolitical position or other endogenous dynamics such as military doctrine. In particular, this research postulates that this is mainly due to the Chinese political leadership's notion of a possible upcoming conflict in the Taiwan Strait and the 'First Island Chain' as a 'Local War under High-Tech Conditions' (Liao, 2020), an idea that in turn derives from endogenous and exogenous factors. However, the US and its allies are likely to seek to engage China in conflicts within and beyond its borders, destabilising key allies, infiltrating and mobilising disaffected groups, and preventing further consolidation of China's geopolitical position in the 'First Island Chain' (Yoshihara 2012) by employing SOFs and other strategies across the spectrum of escalation and Hybrid Warfare. Regardless of the reasons for the lack of a SOF programme capable of operating under various escalation conditions, China's lack of a globally competent SOF programme highlights the importance of examining the factors that influence states to develop and employ them, as China is likely to engage in conflict, whether overt or covert, with states that have developed such globally competent SOFs, such as Russia or the United States[12]. Even if China imagines that future conflicts will occur mainly in "high-tech conditions"[13] (Zhang, 2006), neglecting the development and prolonged deployment of SOFs will deprive the Chinese military of a vital tool in the re-emerging geopolitical competition. As opponents increasingly seek to disrupt China's meteoric rise, for example, by encouraging separatism within its territory or enlisting key allies such as Pakistan through Unconventional Warfare and Hybrid Warfare in the Grey Zone, China will have to meet "fire with fire" and develop its own globally competent "Hybrid Warriors" or SOFs to counter its opponents.

10 Litvak, M. (2017). Iran and Saudi Arabia: Religious and Strategic Rivalry. *National Security Studies Center, Mideast Security and Policy Studies*, 133.

11 Inbar, E. (2007). How Israel bungled the second Lebanon war. *Middle East Quarterly*, 14(3), pp. 57-65. and Ottaway, D.B. (2015). *Saudi Arabia's Yemeni Quagmire*. Washington, DC: Wilson Center.

12 Mearsheimer, J. J. (2014). Can China rise peacefully? *The National Interest*, 25(1), pp. 1-40.

13 In this sense, the term "high-tech" refers to a high-intensity war with a heavy emphasis on the cyber and electronic spectrum. For more information see Zhang, Y. [张玉良]. (2006). *The science of campaigns [战役学]*. Beijing: National Defense University Press [国防大学出版社]. It is translated as Zhang, Y. (2006). *The science of campaigns*. Scotts Valley: CreateSpace Independent Publishing Platform.

2. Theoretical framework

2.1. *Fundamental concepts of SOFs and their relationship to geopolitical competition*

It is useful to establish the definitions that will be used to characterise the relationship between SOFs and geopolitics. This is due to the fact that terms related to military theory and strategy are not always translatable or used in the same way around the world. For example, the concept of "Hybrid Warfare", although relatively new in Western academic and military debate[14], has only become common in the last decade. However, it is central to Russian military thought, and more or less equivalent (though not exactly) to the concept developed by the Bolsheviks as "Political Warfare", "Active Measures" or more broadly *maskirovka* or deception[15] (Heickerö, 2010 and Bērziņš, 2014). Modern "Political Warfare" in Russian military doctrine can be seen in documents such as Russian Chief of General Staff Gerasimov's "The Value of Science is in the Foresight" (Gerasimov, 2016: 23), which postulates that "there is no clear separation between war and peace" and that a "permanent front" composed of subversive elements in the society of the opposing state, assisted by Russian forces, must be established throughout its territory to achieve Russian strategic and political objectives.

As stated above, SOFs are primarily trained for operations such as Direct Action (DA), Special Reconnaissance (SR), Anti-Terrorism (AT), Unconventional Warfare (UCW) and Foreign Internal Defence (FID). The following section provides common definitions of these types of missions. Direct Action (DA), defined in JP 3-05, refers to short-duration attacks and other small-scale offensive actions conducted as a special operation in hostile, denied, or politically sensitive environments. DA operations are characterised by speed, surprise and violence of action, and their purpose is to seize, destroy or disrupt enemy capabilities. Special Reconnaissance (SR), defined in JP 3-05, refers to intelligence gathering operations conducted in enemy-controlled or politically sensitive environments. SR operations rely on unconventional tactics and techniques,

14 One of the first references to this term in its modern sense is in Hoffman, F. G. (2009). Hybrid vs. compound war. *Armed Forces Journal, 1.* It has gained prominence over the years, becoming a concept used in the United States to explain Russia's combination of economic, political, legal, and military means to achieve geopolitical goals such as the annexation of Crimea. For more information see Chivvis, C.S. (2017). *Understanding Russian "Hybrid Warfare" And What Can Be Done About It, Testimony presented before the House Armed Services Committee*. Santa Clara: Rand Corporation.

15 The Soviets even went so far as to produce a manual on insurrectionist warfare for use by the Allied parties in Europe. It shows the thought process on Political Warfare or the use of subversion, propaganda, and political mobilisation in pursuit of a military-political objective. For more information see Neuberg, A. and Wollenberg, E. (1970). *Armed Insurrection*. London: NLB. Modern Russian thought draws on this legacy, albeit with a modernised and in some ways more limited perspective, as reflected in the preoccupation of nearby countries with this combination of means, in particular subversion and the use of disinformation. For more information see Heickerö, R. (2010). *Emerging cyber threats and Russian views on Information warfare and Information operations*. Stockholm: Defence Analysis, Swedish Defence Research Agency (FOI). and Bērziņš, J. (2014). Russia's new generation warfare in Ukraine: Implications for Latvian Defence Policy. *Policy Paper,*2, pp.2002-2014.

such as the use of small teams of highly trained soldiers to gather information and provide decision-makers[16] and other military units with actionable information (Joint Chiefs of Staff, 2020)[17].

Unconventional Warfare (UCW), defined by the US Army in its Field Manual (FM) 3-18, refers to military and paramilitary operations conducted in enemy-controlled territory, using indirect, covert or clandestine means to exploit, disrupt and neutralise the enemy. A reliance on indigenous forces and resources, rather than conventional military forces, distinguishes UCW operations from other types of missions. Foreign Internal Defence, as defined in FM 3-18, refers to activities undertaken by one state to help another state resist subversion and insurgency. The objective of FID is to help the host state maintain stability and security within its borders, and generally involves building the capacity of partners, supporting local defence forces and providing military assistance. In other words, while UCW is typically offensive, seeking to undermine or overthrow opposing regimes, FID is typically defensive, seeking instead to stabilise allies, often against the threat of enemy UCW (Army HQ, 2014).

Alongside these types of missions, SOFs are often used as the main military factor in Hybrid Warfare (HW). HW, as defined by the Centre for Peace Studies (CPS), is characterised by the use of a mix of conventional and unconventional military capabilities and tactics, as well as non-military means such as diplomacy, propaganda and economic leverage. The flexible and adaptable nature of HW allows it to exploit the enemy's weaknesses and surprise them with different combined and synchronised types of attacks[18]. The key concept that differentiates Hybrid Warfare from simply combining different means to achieve an objective is the relatively novel ability to synchronise these various means. The use, for example, of diplomacy, *astroturfing* and direct military action are synchronised to achieve a single political-military effect, as Russia achieved with the annexation of Crimea. As mentioned above, Hybrid Warfare does not have a one-to-one equivalent in Russian military doctrine, although it has some connections to concepts such as the Permanent Front[19] (Gerasimov, 2016: 23).

The field of military operations has significantly evolved and adapted in recent years, especially with the increasing relevance of medium- to high-intensity, long-term conflicts that pit a diverse range of different types of international forces and actors against each

16 Referring generically to whoever is in command of the mission, theatre of operations, or government.

17 The Joint Chiefs of Staff definitions were used. (2020). *Joint Publication 3-05 Special Operations*. Washington, DC: Army Publications. It appears that the document, for unknown reasons, is no longer available on the Joint Chiefs of Staff website. Alternatively, the document can be found at https://jdeis.js.mil/my.policyalthough most browsers do not support the encryption system used by the US defence department. As these are fundamental concepts, an alternative for the definitions used is the publication Joint Chiefs of Staff. (2014). *Joint Publication 3-05 Special Operations*. Washington, DC: Army Publications. This edition is available at https://irp.fas.org/doddir/dod/jp3_05.pdf.

18 Bilal, A. (2021). Hybrid Warfare-New Threats, Complexity, and 'Trust' as the Antidote. *NATO Review*, 30.

19 Here Gerasimov uses the term Front to refer to a coalition of political interests supported by an external actor, in this case, Russia. The confusion between "Combat Front" and "Political Front" also occurs in Russian, both concepts using the same term *фронт*.

other, such as the Syrian Civil War or the Conflict in the Donbass (Regan, 2002). Unconventional Warfare (UCW), Foreign Internal Defence (FID), Hybrid Warfare (HW) and other forms of military operations have become increasingly important in shaping the geopolitical landscape and advancing the interests of the Global Players.

2.2. The Permanent Front and its relationship with SOFs

The Permanent Front, as theorised by Gerasimov, refers to the non-linear, multi-sphere battlefield in which SOFs operate. The Permanent Front is characterised by the absence of clear front lines, the use of unconventional tactics and weapons, and a blurred distinction between combat and non-combat activities, or between war and peace. In this sense, it resembles the space in which the Western concept of Hybrid Warfare predominantly takes place, i.e. the Grey Zone (GZ). The GZ refers to the space between war and peace, where the actions of states or non-state actors fall outside the traditional boundaries of conflict. The Grey Zone is, by definition, characterised by ambiguity, where it is difficult to attribute hostile actions to a specific actor or actors. Furthermore, Hybrid Warfare in the Grey Zone can induce a proverbial "frog in boiling water" effect, where the target does not realise that hostile actions are being directed against them or does not understand the underlying objectives of these actions until it is too late to prevent the objectives from being achieved (Baqués, 2017 and Baqués, 2015). Examples of activities that may fall into the Grey Zone include cyber-attacks, economic coercion, disinformation campaigns and support for proxy forces, all of which can be difficult to conclusively attribute to a hostile actor. Hybrid Warfare in the Grey Zone can be a prelude to full-scale armed conflict, as a state prepares the future battle space for more favourable armed action, or an attempt to achieve the underlying political objective without resorting to war.

In the case of Russia, the Permanent Front emphasises the use of unconventional warfare techniques, such as political subversion, propaganda and cyber operations, to achieve military and political objectives. The concept of the Permanent Front is based on the idea that modern warfare is not limited to military operations, but encompasses a wide range of activities aimed at shaping the environment to achieve Russian objectives. In fact, the Permanent Front goes far beyond Unconventional Warfare, using subversive elements within the geopolitical opponent's society in coordination with Russian state capabilities, such as economic or diplomatic pressure, social media bot campaigns or cyber-attacks, to achieve synchronised effects (Cullen and Reichborn-Kiennerud, 2017) that weaken the target's ability to withstand the pressure. In this context, SOFs play a crucial role in supporting Russian geopolitical interests by conducting covert operations and being the main military factor in this Permanent Front. For example, these principles were achieved on 27 February 2014, when members of the 45th *Spetsnaz* Regiment helped to establish what the Russian media termed a "popular uprising" in Crimea, which, in coordination with economic and political pressure, cyber-attacks and the mobilisation of allied elements in Ukrainian society, paved the way for further Russian military intervention that

successfully annexed Crimea without a significant immediate response from Ukraine or other geopolitical opponents[20].

2.3. SOFs in geopolitical competition: Global Players and Geopolitical Pivots

According to Brzezinski, Global Players are states, or rarely non-state actors with "state-like" properties[21], such as Hezbollah, that have the national capacity and will to project their power and influence globally and affect international affairs in significant ways. Geopolitical Pivots are states or regions that, due to their geographical location, play a crucial role in maintaining the balance of power in a given part of the world and serve as a link between different geopolitical entities. A Global Player's control of these pivots provides it with significant advantages in terms of geopolitical influence and power projection (Brzezinski, 1998).

The use of SOFs in Geopolitical Pivots is a crucial component of the Global Players' overall strategy to shape the conflict space in their favour. This is achieved through a combination of military and non-military means that blur the lines between war and peace, and are used to influence the balance of power in a given region and create an environment conducive to a Player projecting its power and influence. The ability to operate effectively in the 'Grey Zones' (GZs) between peace and conflict is critical for Global Players, as these GZs are often characterised by uncertainty, unpredictability and ambiguity (Baqués, 2017), making them ideal spaces for using SOFs, who have the training and ability to operate where political acumen and adaptability are paramount. In particular, Global Players increasingly rely on specifically trained SOFs to develop and support Hybrid Warfare in the Grey Zone, as opposed to SOFs that are trained and deployed in more traditional missions and in support of conventional military forces. In the context of Hybrid Warfare, SOFs play a vital role in providing Global Players with the ability to conduct covert, indirect and unconventional operations, while maintaining the capacity to respond with conventional military force if necessary, by shaping the conflict space in their favour.

States have increasingly differentiated between two groups of SOFs due to geopolitical and military needs. On the one hand, they have SOFs that are adapted to perform mainly Direct Action (DA) or Special Reconnaissance (SR) missions. Notable historical and current examples include the US *Army Rangers*, the British *Special Air Service* (SAS) and the Iranian *Saberin* (Army HQ, 2017; King, 2009; and Pukhov, 2014). These SOFs are sometimes subordinate to conventional forces and are designed primarily to support conventional military operations through DA or SR.

20 Lanoszka, A. (2016). Russian hybrid warfare and extended deterrence in eastern Europe. *International affairs*, 92(1), pp.175-195.

21 Abdul-Hussain, H. (2009). Hezbollah: A state within a state. *Current Trends in Islamist Ideology*, 8, pp.68-83.

Therefore, they can be considered an Elite Infantry. On the other hand, some states have developed SOFs that focus on other types of missions, primarily Unconventional Warfare, Foreign Internal Defence and Hybrid Warfare support. Notable current examples include the US *Army Special Forces Groups* , the Russian *Sily Spetsial'nykh Operatsiy* (SSO) and the Iranian *Al-Quds* Force (Army HQ, 2014; Marsh and Spencer, 2017; Seliktar and Rezaei, 2020). These forces are generally under the direct command of senior political or military leadership and are the main military element of Hybrid Warfare strategies[22]. This developing typology of SOFs can therefore be called "Hybrid Warriors". Some SOFs combine aspects of both Elite Infantry and Hybrid Warriors, so it is useful to think of SOFs as existing on a continuum between these two types. A relevant example is that Russian SOFs tend to exhibit traits of both, for example, the *Spetznaz* GU or *Spetznaz* VDV, sometimes supports or participates in conventional operations, as in the war in Ukraine[23], and sometimes acts as the main thrust in hybrid operations, as in the annexation of Crimea[24].

3. Case Study Analysis

3.1. Russia's Special Operations Forces

Russia's SOFs play a crucial role in the country's military and geopolitical strategy. The main SOF units include the *Spetsnaz* of the Main Intelligence Directorate (GU), the 45th *Spetsnaz* Brigade of the VDV Guard and the *Sily Spetsial'nykh Operatsiy* (SSO). These units have been involved in a number of high-profile military operations both at home and abroad, including the annexation of Crimea in 2014, the protracted war in the Donbass, the conflict in Syria and, most recently, the Russian invasion of Ukraine. These forces have been particularly outstanding in achieving Russian strategic objectives with minimal loss of personnel, especially in covert and hybrid operations such as the annexation of Crimea. The exception to this has been the ongoing Russian invasion of Ukraine, where a shortage of trained personnel has forced the Russian state to sometimes employ SOFs in conventional operations for which they are not ideally suited, representing huge amounts of wasted training and scarce resources.

These SOFs have a complex relationship with the Wagner Group, a mercenary group widely believed to operate under Moscow's command and to conduct covert

22 A paradigmatic example is found in Donovan, M., Carl, N., & Kagan, F. W. (2020). Iran's Reserve of Last Resort: Uncovering the Islamic Revolutionary Guard Corps Ground Forces Order of Battle. *AEI Paper & Studies, 1.*

23 Atlamazoglou, S. (2022). *As Ukrainian forces recaptured a key town, another elite Russian unit appeared to go through 'the meat grinder'.* [Online] Available at: < https://www.businessinsider.com/russian-spetsnaz-special-forces-unit-heavy-losses-in-lyman-ukraine-2022-11 > [Accessed 7 Mar. 2023].

24 Galeotti, M. (2015). "Hybrid war" and "little green men": How it works, and how it doesn't. *Ukraine and Russia: People, politics, propaganda and perspectives, 156.*

operations in support of Russian interests (Sukhankin, 2019). The Wagner Group has been involved in several conflicts, including in Ukraine and Syria, where it has reportedly provided military support to Russian-backed separatists or Syrian government forces. The Wagner Group offers many benefits to the Russian military, but especially to its SOFs. They benefit from being able to engage in a variety of operations that would be politically infeasible for the Russian state to carry out on its own, and as a result, they gain invaluable combat and operational experience that they can then use to their advantage against less experienced opponents. This means that the Wagner Group, by being permanently involved in low to medium intensity conflicts around the world, offers the Russian state an ideal avenue for the development of its SOFs and their training and integration with its "Permanent Front" or what the West would call "Hybrid Warfare" strategy. Russia is unlikely to give up this valuable resource despite the coup attempt and the suspicious death of its leader Yevgeny Prigozhin (Pokalova, 2023)[25]. The Russian SOF experience includes the full spectrum of escalation and is not limited exclusively to "kinetic" actions (such as Direct Action), but encompasses actions that could be considered both Unconventional Warfare and Foreign Internal Defence in coordination with actions by the Russian state and its allies, designed to create synchronous effects on opponents.

3.2. SOFs in the Russian "Hybrid War"

The Russian government also uses a variety of tools to advance its policy goals, including the Internet Research Agency (IRA), various contractors, voluntary associations, companies, hacker groups and others. According to the Permanent Front concept, these institutions and groups act in different combinations at different times to achieve Russian objectives. For example, in Slovakia, retired Russian *Spetsnaz* soldiers are reported to have trained young men from a right-wing paramilitary group to create unrest (Harris, 2020). The Permanent Front strategy is, by necessity, a long-term effort that seeks to mobilise subversive elements in the target society. Special Operations Forces, especially Russian SOFs that are well integrated into Russia's Hybrid Warfare/ Permanent Front strategy and therefore receive specialised training and deployment in this regard, are ideally suited to mobilise these elements due to their combination of military, political and ideological training (Marsh and Spencer, 2017). This means that Russian (and other countries') SOFs can transform the subversive elements of marginalised actors not only into military threats, but also into political-ideological threats to opponents by providing specialised training, resources and direct support.

The Russian government's use of SOF and proxy forces is part of a broader geopolitical strategy aimed at preserving and advancing Russian interests in an increasingly precarious geopolitical situation. Russia's geopolitical position has generally worsened since the fall of the USSR, and the country lacks natural defences against potential

25 Parens, R., 2023. Wagner Mutiny Ex Post Facto: What's Next in Russia and Africa? *Foreign Policy Research Institute.*

threats[26]. The use of SOFs and other unconventional warfare techniques can therefore be seen as a way to ensure that Russia remains a Global Player according to Brzezinski's definition, and that it can defend its interests despite possessing significantly fewer resources than its opponents or potential rivals. Russia leverages its rich experience and advanced integration between military and political leadership to achieve far greater effects than would be expected of it strictly on the basis of its economic resources.

3.3. China's Special Operations Forces

The development of Chinese SOFs has been an important component of the long-term comprehensive military modernisation programme of China's People's Liberation Army (PLA)[27]. This programme has aimed to improve the military's ability to fight and win short, information-intensive local wars. Therefore, Chinese SOFs do not seek to operate or train across the full spectrum of escalation, but instead expect to operate exclusively under what might be called a "high-intensity conventional war" rather than a protracted low- to medium-intensity conflict or insurgency scenario. This is a kind of 'narrow vision', where the only scenario envisaged by the Chinese military-political leadership in the short to medium term is one in which the Chinese PLA would be involved in a local war against Taiwan and the US, or a more generalised regional war to oust the US and allies from the first island chain. In both cases, Direct Action and Special Reconnaissance in support of conventional military operations, such as amphibious landings or area denial at sea, are the main focuses of Chinese SOF training[28]. As a result, Chinese SOFs are not the focus of Chinese strategy; they are seen as important but secondary to the main thrust and fire-power provided by PLA Marines and the PLA Navy to seize key terrain and deny freedom of movement to a potentially hostile US and allied navy.

Chinese SOFs are assigned to Theatre Commands, which has replaced the outdated Military Regions system. Chinese SOFs have a particular emphasis on security near the Taiwan Strait, with a numerically superior deployment in Theatre Commands that is expected to contribute to a direct assault on Taiwan, such as the Eastern and Southern Theatre Commands (Lavender, 2013 and Kennedy, 2021). This demonstrates the importance the Chinese government attaches to maintaining control over the Taiwan Strait and to quickly overwhelming Taiwan's defences in the event of war. Originally, there was one SOF unit for each of the seven PLA military regions, each consisting of between 1,000 and 2,000 men, which have since been subordinated to

26 Friedman, G. (2020). Russia's search for strategic depth. *Geopolitical Futures, 17.*

27 Office of the Secretary of Defense. (2012). *Military and Security Developments Involving the People's Republic of China, Annual Report to Congress*. Washington, DC: Office of the Secretary of Defense.

28 Kania, E., & Wood, P. (2021). Sharp Swords of the Future Battlefield: The Chinese Military's Special Forces and Psychological Operations', in Davis, Z., Gac, F., Rager, C., Reiner, P., and Snow, J., ed. Livermore: Center for Global Security Research.

the Theatre Commands. These units are assigned independently to each of the Theatre Commands, in contrast to the US Special Operations Command (USSOCOM) or Russian Special Forces, which are often directly subordinate to the General Staff (Lamb and Tucker, 2019; Putin, 2017). Moreover, these SOFs are relatively small compared to the large size of the PLA. This is slowly changing and they are expected to increase in size following the trend of recent decades, although not necessarily to diversify in terms of the missions expected to be performed in the coming years and decades as China completes this phase of its military modernisation.

The main roles of Chinese SOFs include Direct Action, Special Reconnaissance and Counter-Terrorism. However, unlike their counterparts in other countries such as the United States or Russia, they do not focus on Counterinsurgency, Unconventional Warfare (UCW) or Foreign Internal Defence (FID). Instead, their role is primarily to provide high-intensity support to conventional forces, with a regional or even local focus rather than global deployment. To date, Chinese SOFs have not been engaged in significant combat operations, which has limited their operational experience. This is due to China's overall strategy of a "peaceful rise" and to potentially avoid the "Thucydides Trap", as well as other factors that will be examined in the next section. In any case, it is clear that Chinese SOFs are not necessarily outdated, but have a more limited understanding of the possible range of missions and strategic objectives that SOF deployment can pursue, limiting themselves to a support role for conventional forces rather than putting them at the centre of operations as Russia does.

3.4. Development of Chinese SOFs: endogenous and exogenous factors

The People's Republic of China has been pursuing a comprehensive military modernisation programme with the aim of improving its ability to fight and conduct successful regional high-intensity, short-duration "information-focused" military operations. This quest for modernisation came about as a result of a wake-up call in the form of a 1979 incursion into Vietnam that revealed the limitations of China's large military formations and their vulnerability to highly trained militias and professional special forces. This led to a move away from a Maoist-inspired model based on the defensive mobilisation of the whole people against foreign threats towards a more professional and technically advanced armed forces (Lavender, 2013). In the 1980s, the diminishing threat of nuclear war between the two superpowers and the involvement of both the United States and the Soviet Union in limited wars around the world changed China's security situation. In particular, the USSR's failure to sustain its occupation of Afghanistan reduced fears of a possible ground war with the USSR. This increased China's sense of security and led to the creation of its first Special Operations Forces Organisation (SOFO) in 1988, as part of the general move to reduce the size

of the armed forces and raise their technical competence and level of training to the standards of potential opponents[29].

3.4.1. Historical factors in the development of Chinese SOFs

In terms of determining foreign and defence policy, historical experience should not be dismissed as a decisive factor in shaping a country's grand strategy, military doctrine and SOF doctrine. This does not just mean the wars or conflicts in general that the country has experienced in recent history, in China's case particularly during and after the Civil War, but to the lessons learned from those conflicts. Moreover, this experience in turn determines how a country interprets the conflicts it observes and, as a result, the lessons that are then applied to its own armed forces. In China, it is significant that Mao's towering legacy imbued the state and the entire military with a doctrine and mentality that emphasised the preponderance of defensive, guerilla, mass, low-tech warfare against potential "imperialists" and "revisionists"[30]. This mentality was progressively challenged and eventually overthrown, both through the experiences of the Korean War and Vietnam, and the transition from Maoism to post-Maoism. On the one hand, China's military system, which had proved enormously successful against Japanese imperial ambition and the Kuomintang (both with Soviet assistance), proved inadequate against the Americans in Korea and disastrous against the experienced Vietnamese. In Korea, despite a strategic victory or a *status quo ante bellum*, the war revealed the huge capability gap between Chinese and US forces, especially in terms of naval and air support as well as the use of modern weapons (Zhang, 1995). On the other hand, the demystification of Mao, exemplified by Deng Xiaoping's quote "In China we will inherit many good things from Chairman Mao's thinking while clearly explaining the mistakes he made"[31], opened up the possibility of a radical restructuring of the PLA. As a result, the revolutionary conservatism that had existed in all areas of the state before Mao's death, but particularly in the PLA, dissipated, and the lessons learned in Korea and Vietnam came to the fore. However, as Deng Xiaoping and subsequent prime ministers focused on economic development, exemplified by his speech at the UN where he stated that China would "never seek hegemony"[32], military modernisation was relegated to the background, especially considering the radical nature of the transformation the PLA would undergo. It was only in the 1990s that

29 Office of the Secretary of Defense. (2012). *Military and Security Developments Involving the People's Republic of China, Annual Report to Congress*. Washington, DC: Office of the Secretary of Defense.

30 Tse-Tung, M. (1977). 'Directives Regarding Cultural Revolution' in *Selected Works of Mao Tse-Tung, Volume 9*. Secunderabad: Karanti Publications.

31 Xiaoping, D. (1980). Answers to the Italian Journalist Oriana Fallaci' in *Selected Works of Deng Xiaoping*. Beijing: Foreign Languages Press.

32 Xiaoping, D. (1974). *Speech at the Sixth Special Session of the UN General Assembly*. Beijing: Ministry of Foreign Affairs of the People's Republic of China.

the Chinese state began to invest seriously in a long-term transformation of the PLA and its SOF programme, as it began to consider the possible implications of its rise in East Asia and its future confrontation with the US for regional hegemony.

The US use of SOFs in the Gulf War in Iraq and the use of advanced equipment to guide precision-guided bombs to targets was a reminder of the many shortcomings in the Chinese military. After observing how SOFs could be used to multiply the capabilities of conventional forces, the PLA devoted considerable resources throughout the 1990s to developing and expanding its SOFs, making them an integral part of the ground forces modernisation effort (Fisher, 2008). The number of *Dadui* (brigades) of SOFs was increased from a single unit across the PLA to one in each of the seven PLA military regions, which have since been subsumed by the new Theatre Commands, with additional increases focusing on the Theatre Commands that could be expected to participate in a future confrontation with Taiwan and the first island chain (Lavender, 2013).

3.4.2. Geostrategic factors in the development of Chinese SOFs

China's military modernisation focuses on a 'peaceful rise' within a rules-based multipolar order and, as such, it does not envisage deploying its SOFs in low- to medium-intensity conflicts around the world, only against Taiwan or the US in a possible high-tech local war in the first island chain and the South China Sea (Yoshihara, 2012). China wants to avoid the Thucydides Trap, which has historically led a declining power to seek war against a rising power so that it does not lose its hegemonic position (Brzezinski, 2014). To achieve this, China is increasingly applying economic and political power over US allies or neutral states in East Asia in an attempt to transform balancing behaviour by a China perceived as a threat, into aligning behaviour by a regionally hegemonic China. As a result, the deployment or even training of SOFs capable of engaging in protracted Unconventional Warfare or in support of Hybrid Operations would increase East and South East Asian countries' threat perception of China, which could contradict the goal of achieving regional hegemony without provoking an overt US military response.

The primary focus of PLA SOFs is Direct Action, Special Reconnaissance and Counter-terrorism. Its doctrine consists mainly of specialising in Special Reconnaissance, strikes and sabotage, integrated ground-sea-air-space-electronic combat, asymmetric combat, large-scale night combat and surgical strikes[33]. However, while the roles and missions of Chinese SOFs could be employed in an expeditionary manner or in conjunction with the capability to have global scope, there is currently no indication that China intends to use its SOFs in this way. Chinese SOFs' lack of combat and other expertise, combined with their focus on a possible open military

33 Blasko, D.J. (2015). PLA Special Operations Forces: Organisations, Missions and Training. *China Brief*, 15(9), p.8.

confrontation with the United States over Taiwan, suggests that the development of these forces is driven primarily by geopolitical and geostrategic determinants. The Chinese leadership is trying to use economic policy, such as the Belt and Road Initiative, to avoid or at least delay the emergence of the Thucydides trap until it is in a better position, and its SOFs are part of a conventional military strategy in line with this goal.

Despite these efforts, the continued focus on Taiwan as a potential hotspot for military confrontation underlines the importance the role SOFs will play in any future conflict on the island or in the region. Potential conflict with Taiwan is a major concern for China and has been a significant driver in the development of its SOFs (Lanteigne, 2019 and Lavender, 2013). In the event of a conflict with Taiwan, Chinese SOFs are likely to play an important role in executing and supporting an amphibious assault on the island. This would involve inserting SOF personnel through naval and marine units for the purpose of conducting Direct Action and Special Reconnaissance missions. In particular, the continued organic subordination of Chinese SOF *dadui* to Theatre Command underscores the PLA's overall SOF doctrine, which is using SOFs to support conventional military operations. In the case of Taiwan, SOFs would set the stage for an amphibious assault by sabotaging key infrastructure, providing up-to-date intelligence on enemy force distribution and preventing an immediate Taiwanese response to the main advance of Chinese forces (Chen and Wuthnow, 2022).

3.4.3. Geographical and military factors in the development of Chinese SOFs

A final reason for the lack of a globally capable Chinese SOF programme is China's emphasis on the naval aspect of its future confrontation with the United States in East Asia. China, which relies heavily on global trade and global supply chains to sustain its growing economy, understands that controlling sea lanes and breaking US control over the first island chain, including geographical spaces such as the Taiwan Strait, the Moluccan Strait or the South China Sea, is absolutely essential to securing regional hegemony, as these are key geopolitical pivots (Brzezinski, 1998). Therefore, the emphasis for both PLA land forces and the PLA Navy has been on area denial, power projection and contested amphibious assaults (Biddle and Oelrich, 2016). This means that the roles played by SOFs in this type of targeting are generally limited to Direct Action or Special Reconnaissance in support of conventional naval or ground forces.

3.4.4. Conclusion and summary of the development of Chinese SOFs

To conclude, the lack of a globally capable Chinese SOF programme, i.e. a SOF programme capable of conducting Unconventional Warfare, Foreign Internal Defence and hybrid operations support, as well as its use in the escalation spectrum, is mainly due to the following reasons: (1) Historical factors that saw the PLA move away from

the Maoist model of popular mobilisation and a protracted people's defensive war towards more professionalised and technically competent forces, partly emulating the US success in the Gulf War. (2) China's policy of trying to avoid the Thucydides Trap means minimising regional threat perceptions and encouraging the defection of US allies in an attempt to gain regional hegemony without resorting to full-scale war. In tandem with this "peaceful rise", the aim is to limit a potential conflict with Taiwan to a local or regional war rather than a global one. In this case, SOFs would play a role in rapidly occupying Taiwan, assaulting enemy bases in the South China Sea or holding key points in the first island chain, but would not be used to destabilise US allies, as this would more likely lead them to balance their position against China rather than ally with it. (3) Finally, an envisaged confrontation with the United States in East Asia would be decided primarily by naval forces rather than land forces or SOFs, as defeat in the naval domain would greatly hamper the continuation of both US and Chinese operations in the region.

4. Comparing and assessing Russian and Chinese Special Forces in the context of re-emerging multipolarity

In today's global political landscape, one notable development has been the re-emergence of great power competition, as it becomes increasingly evident that the world is moving away from the "Unipolar Moment" characteristic of the 1990s and early 2000s. Competition has developed in a number of areas, including the military sphere, where the development and deployment of SOFs has become a key indicator of a state's military capability. In this context, it is important to compare and assess Russia's and China's military capabilities in terms of their SOFs, especially in light of their growing military cooperation. It has previously been established how and why SOFs are key elements of emerging Global Players' strategies to challenge hegemonic powers or maintain their spheres of influence despite limited resources, and why Russian and Chinese SOFs have diverged in terms of their organisation, training and position within their respective countries' strategies.

Russian SOFs have a long history dating back to the Soviet era. They have been involved in various conflicts around the world, including the Soviet-Afghan War, the First and Second Chechen Wars. In more recent times, Russian SOFs have been used to great effect as part of what Russian General Gerasimov has called the "Permanent Front" in Syria and Ukraine. Russian SOFs have been integrated into an overall strategy of Hybrid Warfare by the Russian state, often becoming the main forces in hybrid operations, as opposed to serving as support for conventional forces in military operations, which is their role in the armed forces of other countries. Examples of units used in this way include the *Sily Spetsial'nykh Operatsiy* (SSO) under the direct command of the Russian General Staff (Marsh and Spencer, 2017).

In contrast, China has developed its SOFs relatively recently, as part of its military modernisation programme. Despite considerable emphasis on training and equipment,

they have not yet been tested in combat. Developing a doctrine and acquiring the level of training needed to perform adequately in the high-pressure environments demanded of SOFs is often difficult to obtain without combat experience. This, coupled with China's policy of trying to avoid raising its threat perception in East and South East Asia, could hinder its SOFs' ability to meet or respond to geopolitical challenges abroad, particularly if countries such as the US or Russia begin to employ their own SOFs to destabilise China's key allies or its geopolitical position in general. Due to its geostrategic perspective, China's SOFs are primarily focused on Direct Action, Special Reconnaissance and Counter-terrorism, rather than Unconventional Warfare, Foreign Internal Defence or Hybrid Warfare.

In recent years, Russia and China have been working closely on a number of military initiatives, including the development of their SOFs (Murayiev, 2021). This cooperation has taken the form of joint training exercises, exchanging technology and expertise and, to a lesser degree, developing a common doctrine. A fully consolidated military alliance between China and Russia has not emerged due to fundamentally different geostrategic perspectives and conflicting geopolitical needs, such as their competition in Central Asia[34]. As a result, military cooperation has, in practice, taken the form of senior Chinese military officers and officials studying at Russian military academies and universities. This does not seem to be equally true in the opposite direction, i.e. there is no information about senior Russian military officers and officials studying at Chinese military academies (Korolev, 2019). This is due to Russia's extensive experience and China's lack of recent military experience, which in turn creates a large gap in terms of actually developing a doctrine and adapting to different conditions. It is likely that some efforts have been made by China to learn from Russia's confrontations in Georgia, Syria and Ukraine, but it is unclear what exactly has been learned in China from these conflicts, and whether the military leadership considers the strategic situation in these regions to be similar or at least comparable to the strategic situation facing China. In fact, it is likely that the Chinese leadership understands that the strategic issues facing the two countries are fundamentally different, with Russia as an (essentially) landlocked state seeking to maintain a declining sphere of influence to secure strategic depth, and China as a sea-oriented power seeking to wrest regional hegemony from a declining superpower. Therefore, according to the Chinese leadership, their responses to these challenges must also necessarily be different: while Russia has developed an SOF programme capable of engaging opponents in protracted conflicts spanning the full spectrum of escalation, combining capabilities to create synchronous effects to offset diminishing power, China hopes to harness superior resources to win a short-duration, high-intensity local war under high-tech conditions, or ideally (though with little prospect of success at the moment) to win over key US allies. Both of these Chinese objectives have had a markedly negative impact on developing globally capable SOFs, which could, in the long term,

34 Stronski, P. and Ng, N. (2018). *Cooperation and Competition. Russia and China in Central Asia, the Russian Far East, and the Arctic*. Washington, DC: Carnegie Endowment for International Peace.

negatively affect China's ability to compete with the US in conflict scenarios that are less than outright war.

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