

The China–Taiwan Weekly Update



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The China–Taiwan Weekly Update is a joint product from the Institute for the Study of War and the American Enterprise Institute. The update supports the ISW–AEI Coalition Defense of Taiwan project, which assesses Chinese campaigns against Taiwan, examines alternative strategies for the United States and its allies to deter the Chinese Communist Party’s (CCP) aggression, and—if necessary—defeat the People’s Liberation Army (PLA). The update focuses on the Chinese Communist Party’s paths to controlling Taiwan and cross–Taiwan Strait developments.

Key Takeaways

- **Taiwan.** Taiwanese President William Lai Ching-te announced 17 measures to counter PRC coercion and malign influence targeting the Taiwanese government, military, and people. His political opponents criticized these measures and downplayed the threat that the PRC poses.
- **Taiwan.** The Taiwanese legislature rejected a motion from the executive branch to reconsider major government budget cuts. These cuts would severely undermine Taiwan’s ability to resist PRC threats and coercion.
- **China.** The PRC is developing barges with extendable piers, highlighting its growing amphibious military capabilities. These barges are similar to the “mulberries” that Allied forces used in the amphibious assault on Normandy in World War II.
- **North Korea.** North Korea is trying to increase its economic and media cooperation with the PRC. This comes as Russia and Ukraine may agree to a ceasefire, which could, in turn, reduce how much military assistance Russia is buying from North Korea.
- **Latin America.** PRC state media condemned a Hong Kong-based firm’s sale of ports around the Panama Canal to a US company. The PRC may view the port sales as weakening its influence around Panama and Latin America by extension.
- **Iran.** The PRC, Russia, and Iran issued a joint statement effectively condemning the US “maximum pressure” policy vis-a-vis Iran. The statement reflects the PRC effort to internationally frame the United States as an aggressor and itself as a peaceful mediator.

- **Yemen.** A conflict monitoring group found PRC-made hydrogen fuel cells en route to the Houthis in Yemen. These fuel cells could be used to enhance Houthi drone capabilities, which would further increase the threat that the Houthis pose to international shipping.

Cross-Strait Relations

Taiwan

Taiwanese President William Lai Ching-te announced 17 measures to counter growing national security threats posed by the People’s Republic of China (PRC). Lai’s rhetoric and increased focus on counter-coercion efforts reflect his concerns about PRC infiltration and malign influence within Taiwanese society and government.^[1] Lai identified the five largest threats facing Taiwan as PRC infringement on Taiwanese sovereignty, infiltration and espionage within the Taiwanese military, efforts to erode Taiwanese national identity, United Front influence through cross-strait exchanges, and efforts to coopt Taiwanese businesspeople and youth through economic engagement — during a national security meeting on March 13. Lai’s seventeen measures to combat these threats included a recommendation for Taiwan’s military to restore the military trial system, allowing military judges to collaborate with judicial authorities in criminal cases involving active-duty personnel accused of treason and otherwise aiding Taiwan’s enemies. Forty-three Taiwanese military officers have been accused of spying for the PRC. The Taiwanese National Defense Ministry confirmed the most recent espionage accusation against a Taiwanese Air Force officer on March 12.^[2] Lai likely intends to increase military discipline and discourage disloyalty through the proposed re-establishment of the military trial system. PRC espionage efforts pose a major threat to Taiwanese military readiness and risk instilling a sense of mistrust of the military within Taiwan’s populace.

Lai introduced additional anti-coercion measures focused on reducing PRC influence promulgating through information operations and cross-strait exchanges and economic initiatives. These recommendations aim to reduce the effectiveness of PRC United Front influence and information operations and communicate the dangers of engagement to Taiwanese people. The PRC frequently uses economic measures to build stronger cross-strait ties and inculcate positive feelings about cross-strait collaboration within the Taiwanese populace. Taiwan Affairs Office (TAO) spokesperson Chen Binhua announced on March 12 the most recent policy measures for the cross-strait Integration and Development zone focused on providing opportunities and incentives for Taiwanese businesses to operate in the PRC.^[3]

Opposition Kuomintang (KMT) politicians criticized Lai’s counter-coercion measures, characterizing Lai’s actions as political manipulation and downplaying the risks of cross-strait exchanges. KMT politicians accused Lai of manipulating narratives against his political opponents under the guise of protecting national security and placing Taiwan in a “quasi-war state.”^[4] The KMT stated that, by identifying all cross-strait exchanges as opportunities for United Front work, Lai was infringing upon freedom of speech and economic opportunity and making baseless accusations against Taiwanese nationals with ties to the PRC. The KMT has facilitated discussions between Taiwan and the PRC since the Chinese Communist Party (CCP) cut ties with the ruling

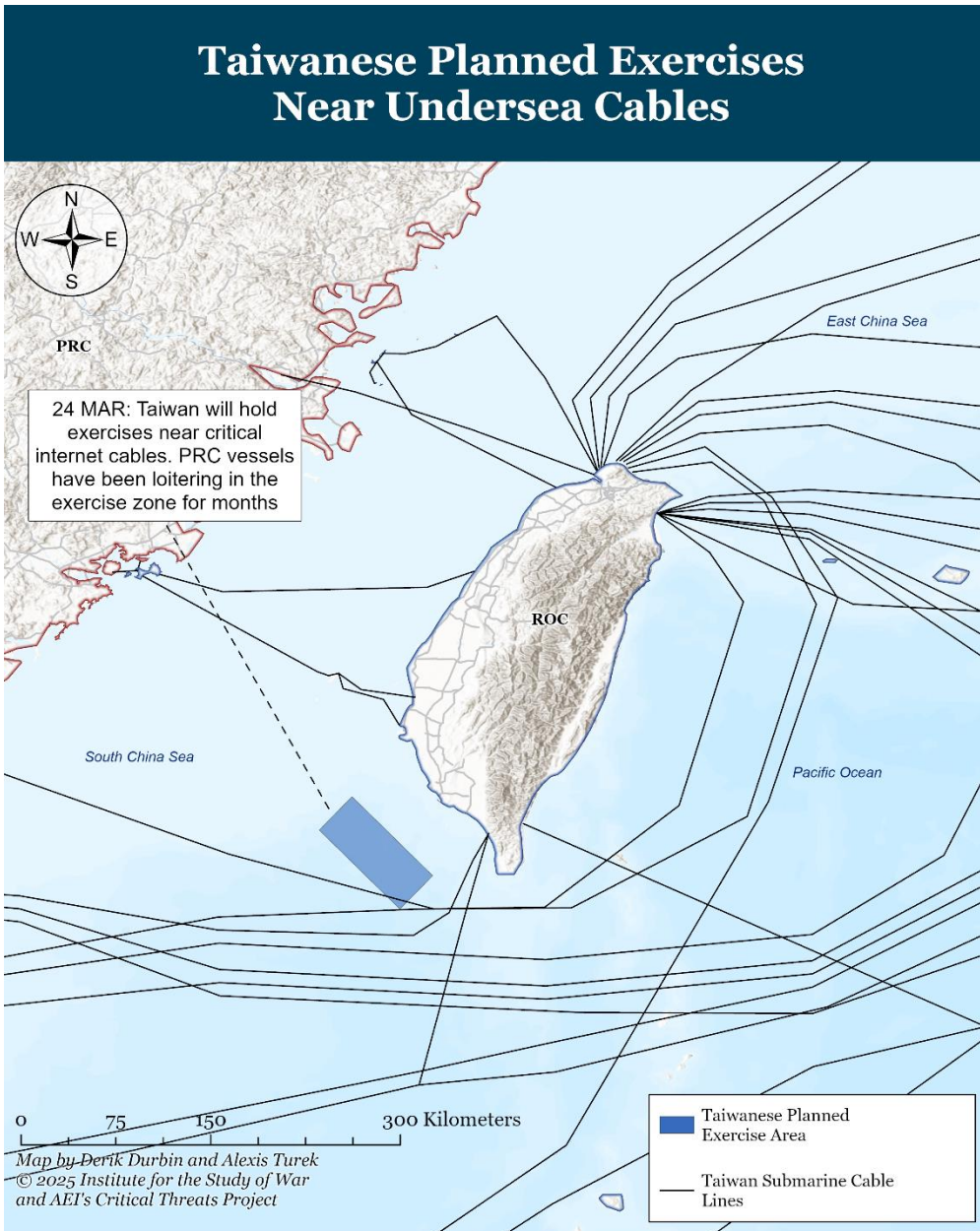
Democratic Progressive Party (DPP) during the Tsai administration. KMT legislators accused Lai of being too militaristic and provocative, repeating established narratives portraying the KMT as a force for peace with the PRC and the DPP as the party of war.[5]

Lai likely views any cross-strait exchange as an opportunity for the PRC to conduct United Front work, introducing positive sentiments about the PRC and CCP into Taiwanese discourse. CCP infiltration threatens the legitimacy of Taiwanese institutions and could weaken public support for the government.

The PRC conducted military drills near Taiwan on March 17. The PRC Foreign Affairs Ministry framed them as a protest against the US State Department’s removal of the phrase “we do not support Taiwan independence” from one of its fact sheets. Taiwan’s National Defense Ministry observed 59 People’s Liberation Army (PLA) aircraft sorties around Taiwan, 43 of which crossed the median line of the Taiwan Strait, and nine PLA Navy (PLAN) ships. The ministry reported the highest single-day sortie numbers since the Joint Sword-2024B exercises in October 2024. PRC Foreign Affairs Ministry spokesperson Mao Ning said that the deletion of the phrase “we do not support Taiwan independence” from the fact sheet sent “wrong signals to Taiwan separatist forces,” requiring a “resolute response” to Taiwanese separatist forces and their allies.[6] The United States made this revision on February 16. PRC officials immediately criticized the change and warned Taiwan against seeking independence.[7] The United States maintains its long-standing position of preserving peace and stability in the region, opposing “any unilateral changes to the status quo from either side,” according to the State Department, so there has been no official policy change accompanying the fact sheet revision.[8] The PRC is conducting the military exercise likely to pressure the US State Department to undo the revision. The United States attempted a similar change but reversed course after pushback from the PRC in 2022.[9] This exercise follows the snap live-fire drills off the coast of Taiwan on February 26 as part of an emerging pattern of increasingly frequent PRC military activities near the island.

Taiwan is conducting military exercises likely in response to a series of PRC cable-cutting efforts around the island. These exercises include anti-landing combat readiness drills at the Tamsui River from March 17 to 21 and a naval exercise on March 24. The drills will occur approximately 20 nautical miles off the coast of Kaohsiung and Pingtung--an area where multiple PRC vessels have operated recently.[10] The Taiwanese Navy stated live munitions will not be used.[11] The location and timing of these exercises appear to be in response to recent undersea cable cutting incidents by PRC-affiliated vessels, even though the Navy characterized the exercises as routine. The designated drill area is near critical undersea cable lines and will likely attempt to drive away the PRC ships that have been drifting within the exercise zone for months.[12] There are many ships suspected of attempting sabotage on Taiwan’s underseas cables; the Cameroon-flagged *Shunxing* 39 cargo ship cut Taiwanese undersea internet cables near Keelung on January 3, the Mongolian-flagged *Bao Shun* was driven away after it erratically sailed over undersea cable lines north of Taiwan on January 6, and the Togo-flagged *Hong Tai 58* was detained for likely cutting an undersea cable between Taiwan and the Penghu Islands on February 25.[13]

The Taiwanese military is holding separate drills from March 17 to 21 at the Tamsui River to improve combat readiness.[14] The anti-landing combat exercises feature obstruction tactics to prevent PLA vessels from advancing upriver into Taipei, such as deploying oil barrels and floating platforms into the waters.[15] Tamsui was listed as one of 18 “red beaches” — sites identified by the National Defense Ministry as suitable for PLA amphibious invasion — given its location at the mouth of the Tamsui river, which runs through Taipei.[16] Taiwan has conducted anti-landing and live fire drills at this site previously.[17]



Taiwan's Legislative Yuan (LY) rejected the Executive Yuan's (EY) motions to reconsider major government budget cuts, which would severely hamper Taiwan's ability to resist PRC coercion and harm US-Taiwan relations given pressure from the United States for

Taiwan to increase its defense spending. The opposition-controlled LY voted on March 12 to reject the EY's motions to reconsider the budget, and the 61-51 vote followed party lines.^[18] The EY had previously vetoed this budget bill for violating the separation of powers, undermining Taiwan's constitution, infringing on the people's rights, affecting the operation of Taiwan's democratic government, and weakening the country financially.^[19] The LY's budget proposal would cut government spending by 6.6 percent — the largest cut in Taiwanese history — and some ministries would lose up to 40 percent of their budget. The ruling DPP accused the opposition of removing 34 percent of available government funding from the budget — a far higher number than the official 6.6 percent figure.^[20] Taiwanese Premier Cho Jung-tai said that "the last resort is to seek constitutional relief" after the LY vote, and Taiwanese Control Yuan (CY) Vice President Lee Hung-chun and Secretary-General Lee Chun-yi announced that the CY, which faces a 96 percent cut in its budget, will ask the Constitutional Court to rule on the budget bill.^[21] The Constitutional Court is currently unable to review cases after the LY passed an amendment to the Constitutional Court Procedure Act (CCPA), raised the quorum to 10 out of 15 justices, and rejected all of Lai's nominees to fill the seven vacancies on the court in December 2024.^[22] The eight justices have so far abided by the new amendment, effectively paralyzing the court.

The KMT-Taiwan People's Party (TPP) budget cuts would disrupt governance and harm Taiwan's ability to resist PRC coercion and aggression. Notable cuts in the proposed budget plan include freezing 30 percent of the National Defense Ministry budget and cutting three percent of military equipment expenditure, freezing 50 percent of the Foreign Affairs Ministry budget and cutting 100 percent of media policy and promotion expenses, cutting 73 percent of the EY budget, and cutting 96 percent of the
CY budget.^[23]

US President Donald Trump's nominee for Under Secretary of Defense for Policy Elbridge Colby said at his US Senate confirmation hearing that Taiwan needs to increase defense spending to 10 percent of GDP to deter war with the PRC.^[24] Taiwan currently spends less than three percent of its GDP on defense. Taiwanese Premier Cho Jung-tai said on March 12 that Taiwan currently "does not have the capacity" to spend 10 percent of its GDP on defense, and the current cabinet proposal sets the defense budget at 2.45 percent of GDP.^[25] Colby and like-minded US officials seek to incentivize Taiwan to more than quadruple its defense budget. The KMT-TPP budget bill could have a negative impact on relations with the United States.

A PRC court convicted Taiwan-based publisher Li Yanhe on secession-related charges. Li is the second person whom the PRC has convicted of secessionism since it released new legal guidelines in June 2024 for punishing Taiwanese "separatism." Li, also known by the pen name Fucha (Fuchsia), is the PRC-born editor-in-chief of the Taiwanese publisher Gusa Press. A Shanghai court convicted Li for "inciting secession" on February 17, according to a statement that the PRC TAO gave to Taiwan's Central News Agency on March 17. The TAO did not release further details about Li's sentencing.^[26] Shanghai authorities arrested Li in March 2023 after he returned from Taiwan to Shanghai to cancel his PRC household registration as part of the process of obtaining Taiwanese permanent residency. They held and investigated Li for nearly two years for "endangering national security" before the court delivered its verdict. The PRC Supreme People's Procuratorate listed

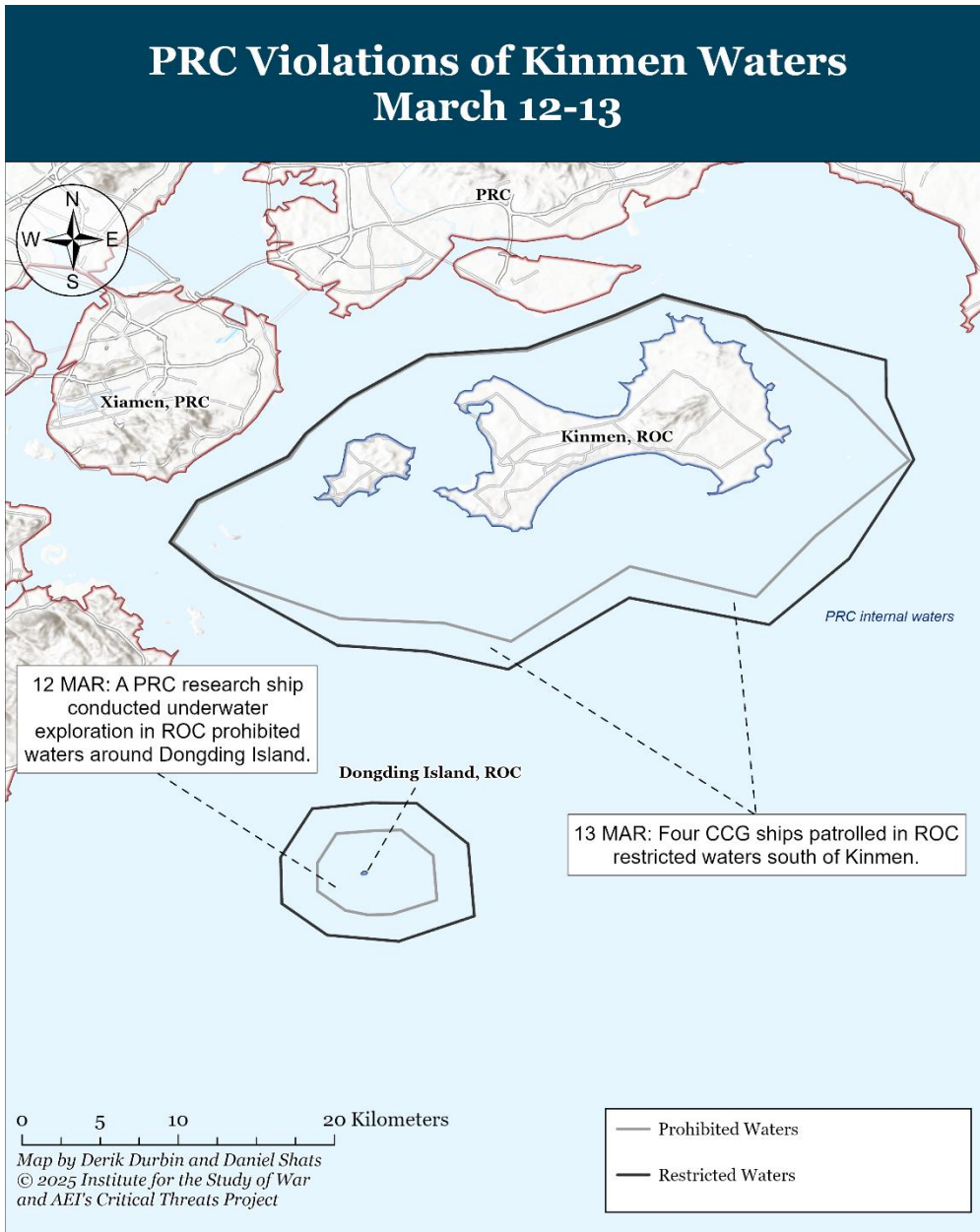
Li's case along with that of Taiwanese political activist Yang Chih-yuan as “major cases endangering national security” on February 26.[27] Yang is a Taiwanese national whom the PRC convicted of secessionism in August 2024 for founding a Taiwanese political party that advocated Taiwanese independence.[28]

The PRC convictions of Li Yanhe and Yang Chih-yuan are emblematic of the PRC's “lawfare” campaign and persecution against those whom it deems to be proponents of Taiwanese independence. The TAO disclosed Li's sentencing days after the PRC held a symposium commemorating the 20th anniversary of its anti-secession law. It held both Li and Yang for around two years and appears to have sentenced them in accordance with new legal guidelines that it released in June 2024 to crack down on Taiwanese “separatism.” The TAO expanded its list of “Taiwan independence diehards” in October 2024 to include Puma Shen and Robert Tsao — two major proponents of Taiwanese civil defense.[29] Taiwanese intelligence revealed that PRC officials directed state security organs in February to increase efforts to prosecute pro-independence Taiwanese nationals in PRC-friendly countries, such as Laos and Cambodia.[30] The PRC likely intends to intimidate proponents of Taiwan independence, including members of Taiwan's ruling DPP, to cease their advocacy and moderate their positions through the escalation of its “legal warfare.”

A PRC research ship conducted undersea detection operations within the prohibited waters of Taiwan's Dongding Island, part of Kinmen County. China Coast Guard (CCG) ships conducted a patrol in restricted waters around Kinmen the following day. Taiwan's Coast Guard Administration (CGA) on March 12 detected the PRC government research ship *Yan Ping 2* in the prohibited waters near Dongding Island — a small Taiwanese garrison island off the coast of the PRC. The ship, which is owned by the Fujian provincial government-affiliated Fujian Institute of Oceanography, dropped detection equipment into the water for unknown purposes.[31] CGA boats expelled the *Yanping II* and forced it to retrieve its equipment. A CGA statement on the incident stressed that the PRC may be studying seabed geology, topography, and hydrology in Taiwan-administered waters in order to familiarize itself with the battlefield environment for future combat deployments.[32] Taiwan does not claim territorial waters or a contiguous zone around any of the Kinmen Islands due to their proximity to the PRC. It maintains “prohibited” and “restricted” waters that are generally equivalent, however. The PRC has used “scientific research” vessels around Taiwan and elsewhere to conduct reconnaissance and challenge maritime sovereignty claims, including within the contiguous zone of Taiwan itself.[33]

Four CCG ships patrolled in ROC-restricted waters around the main islands of the Kinmen archipelago for two hours on March 13. The CGA stated this was the 61st such patrol since the CCG began patrolling within Kinmen-administered waters in February 2024.[34] The PRC has normalized “law enforcement” patrols in waters around Kinmen in order to erode Taiwan's control of those waters and to assert the PRC's legal jurisdiction there. CCG ships also continuously circled Taiwan's Pratas (Tungsha) Island — an outlying island that hosts a CGA outpost — from March 11-15, possibly to monitor unknown Taiwanese activity in the area.[35] The CCG is a paramilitary organization under the PRC's Central Military Commission. Its actions around Kinmen and other Taiwanese territories often serve strategic goals and are not normal law enforcement measures. The PRC possibly plans to capture Taiwanese outlying islands such as Pratas, Kinmen, and Matsu in the early stages of a war to annex Taiwan, reducing Taiwan's strategic depth. It may also seek to split the islands from Taiwan, possibly

through blockade or short-of-war means, as an intermediate step to achieving “national reunification.”[36]



China

PRC netizens circulated videos showing PLA barges with extendable piers, news of which first emerged in January 2025. The construction and testing of mobile piers highlight the PRC’s growing amphibious capabilities. Videos were originally shared on the PRC-based social media app WeChat but have since been deleted.[37] Footage revealed the barges at a beach in the South China Sea in a likely amphibious landing exercise. Open-source analyst Damien Symon tracked the likely location of the exercises at Zhanjiang.[38] A January 2025 Naval News article noted the barges’ resemblance to World War II-era “mulberry harbors,” which Allied forces used to land at Normandy on

D-Day.[39] The barges incorporate bridge-like piers capable of stretching above the surface of a beach to facilitate unloading troops and vehicles. These theoretically expand the number of sites that the PLA could use in an amphibious invasion of Taiwan by obviating the need for preexisting ports.[40] Maritime analyst Sal Mercogliano estimates that the barges could be used in conjunction with other amphibious-capable platforms in order to offload ferries carrying PRC armored vehicles. Mercogliano called the barges “logistic multipliers” to be used “between the assault phase and the seizure of a port.”[41]

ISW assessed that the PRC’s construction of the barges signals its intent to achieve the military capabilities that it needs to annex Taiwan by force.[42] PRC efforts to construct mobile, amphibious barges align with the findings of the US Defense Department’s 2024 China Military Power Report (CMPR), which reported that the PRC has placed a growing emphasis on developing amphibious hardware in recent years.[43] The CMPR reported that an amphibious invasion of Taiwan would require the PLA to establish both air and maritime superiority and would “likely strain the PRC’s armed forces.”[44] PRC amphibious operations could target not only Taiwan’s main island but also the outlying islands of Matsu or Kinmen. The CMPR assesses that the PLA could also use amphibious capabilities against Taiwanese-occupied South China Sea islands, including Itu Aba or Pratas.[45]

The PRC Foreign Affairs Ministry criticized the G7 foreign ministers’ statement condemning PRC coercion in the Taiwan Strait and other territories. G7 nations’ rhetoric exemplifies a growing trend of United States and allied condemnation of PRC short-of-war coercion. G7 foreign ministers from France, Canada, Germany, Japan, Italy, the United Kingdom, and the United States met from March 12 to 14.[46] The foreign ministers released a statement condemning the PRC’s “illicit, provocative, coercive, and dangerous actions” and added that they “oppose unilateral attempts to change the status quo, in particular by force or coercion, including in the East and South China Seas.”[47] This statement brings G7 rhetoric into alignment with the language of the US Taiwan Relations Act, which stipulates that the United States will maintain the ability “to resist any resort to force or other forms of coercion that would jeopardize the security, or social or economic system, of the people of Taiwan.”[48] The G7 foreign ministers’ statement omitted past mentions that there had been “no change in the basic position of the G7 members on Taiwan, including stated One-China policies.”[49] The Taiwanese Foreign Affairs Ministry gave a statement thanking G7 for its support.[50]

The G7 statement expressed further concerns regarding risks to undersea telecommunications infrastructure, although it did not specifically mention the PRC.[51] The statement highlighted G7 opposition to “dark” or “shadow” fleets used in illicit shipments of Russian oil.[52] Such “shadow fleets,” which often involve ships owned by PRC- or Hong Kong-based firms, have played an instrumental role in sustaining Russia’s economy throughout its invasion of Ukraine.

Foreign Affairs Ministry spokesperson Mao Ning said that the PRC had lodged solemn representations with the nations involved.[53] Mao’s statement repeated PRC talking points concerning efforts to

position itself as a peaceful arbiter of the Ukraine war while supporting the Russian war effort rhetorically and economically.[54] The PRC routinely deflects accusations of support to the Russian war effort despite the involvement of PRC-owned ships in Russian “shadow fleets.”

The PRC opposes statements from the United States and its allies criticizing PRC coercion. The PRC response to the G7 statement came shortly after the PRC staged military exercises near Taiwan. Mao Ning said that these exercises were “a resolute response to external forces’ insistence on condoning and supporting “Taiwan independence”” in the same March 17 press conference.[55] Mao accused the United States of taking “a series of wrong actions” regarding Taiwan, including the revision of the US State Department’s Taiwan Fact Sheet.[56] The new fact sheet incorporates similar language as the G7 statement, stating that “We expect cross-Strait differences to be resolved by peaceful means, free from coercion.”[57] The PRC will likely continue to counter accusations of coercion both rhetorically and militarily as the United States and coalition partners follow the growing trend of condemning PRC coercive activities.

The PRC held a symposium on Taiwan "separatism" to commemorate the 20th anniversary of the Anti-Secession Law. PRC officials regularly employ anti-separatist rhetoric as part of an ongoing information operation to delegitimize Taiwan and DPP authorities. Chairman of the Standing Committee of the National People’s Congress Zhao Leji said that the PRC must “resolutely combat ‘Taiwan independence’ secession.”[58] Commander of the PRC Eastern Theater Command Lin Xiangyang also attended and gave a speech in which he outlined PRC responses to Taiwan “secessionists” and said that the PLA would “work with the people of the whole country, including the people of Taiwan,” to “deter and punish them.”[59] This rhetoric echoes sentiments expressed during the Two Sessions meetings, during which PRC officials emphasized support for pro-unification elements within Taiwan.[60] KMT official Huang Qingxian, who previously directed the KMT’s Mainland Affairs Committee, also attended the symposium.[61]

The PRC passed the Anti-Secession Law in 2005 as part of its legal campaign against “Taiwan independence.”[62] Taiwanese media outlet CNA cited an unnamed US State Department official who said that the PRC’s coercion campaigns against Taiwan have intensified since the passing of the Anti-Secession Law.[63] The Anti-Secession Law partially formed the basis for judicial guidelines that the PRC released in June 2024 calling for severe punishment of “Taiwan independence diehards,” including the death penalty.[64]

The PRC regularly employs the language of “reunification,” “secession,” and “separatism” as a means of delegitimizing Taiwan’s government and leadership. PRC officials have repeatedly smeared Taiwanese President William Lai as a “dangerous separatist” supported by “external interference” in an attempt to denigrate Taiwan’s democracy. The PRC also regularly coopts Taiwanese public figures and celebrities to create a false impression that Taiwanese society supports this “reunification” narrative. The PRC’s language on “reunification” seeks to legitimize PRC coercion against Taiwan, isolate Taiwan on the international stage, and win support from PRC-aligned countries.

PRC state media celebrated the closure of *Voice of America* (VOA) and other US state-funded media outlets. US President Donald Trump signed an executive order on March 14 that cut funding for the United States Agency for Global Media (USAGM) and terminated grants for *Voice of America*, *Radio Free Asia* (RFA), and other US state-funded media outlets targeting international audiences.[65]

An editorial by PRC state-owned tabloid *Global Times* on March 17 celebrated the closure of VOA and the other outlets, claiming that their purpose was to “attack other countries based on [Washington’s] ideological demands.” The editorial called VOA a “lie factory” and blamed it for spreading “almost every malicious falsehood about China,” including on topics such as the PRC’s human rights abuses in Xinjiang, disputes in the South China Sea, Taiwanese independence, the protests in Hong Kong, the PRC’s role in the COVID-19 pandemic, and PRC economic overcapacity.[66] The official newspaper of the CCP’s Beijing municipal committee, *Beijing Daily*, also released an article accusing VOA of spreading “rumors and slander” against the PRC.[67] PRC Foreign Affairs Ministry spokesperson Mao Ning declined to comment on US domestic policies but remarked that some of the affected US media “have a bad record in reporting on China.”[68]

The closure of VOA and other US state-funded media outlets will likely aid PRC information operations around the world by removing an influential voice that has often countered PRC narratives and published original reporting about PRC malign activities. The PRC’s own media ecosystem is heavily censored and dominated by state media such as *Xinhua*, *Global Times*, and *China Daily*. The PRC has greatly expanded its own media influence in foreign countries in recent years through content-sharing agreements with local news media, disinformation campaigns on social media, and other means.[69]

Northeast Asia

Japan

The PRC accused Japan of breaching its constitution by developing a new ballistic missile with a range of 3000 kilometers (km). The Japanese Defense Ministry announced the development of the Block 2 version of the Hyper Velocity Gliding Projectile (HVGP) in February 2020 and conducted a series of tests concluding in January 2025.[70] The Japanese Self Defense Force (JSDF) is developing HVGPs as part of its broader efforts to acquire stand-off capabilities. Japan first identified this goal in its 2022 National Security Strategy.[71] Japan is growing increasingly concerned with PRC and North Korean military activities near its territory.[72] The US State Department Defense Security Cooperation Agency (DSCA) announced a possible 200-million-US-dollar Foreign Military Sale (FMS) to support Japanese HVGP production on March 10.[73] HVGPs will significantly bolster the JSDF’s ability to defend its territories and enhance its counterstrike capabilities by reaching almost anywhere in China. Japan is also developing ship- and submarine-launched versions of the missile in addition to the ground-launched HVGP. PRC National Defense Ministry spokesperson Zhang Xiaogang condemned Japanese “militarism” and referenced historical atrocities conducted by Japan’s military during World War II.[74] The PRC has employed similar rhetoric following past instances of Japanese military enhancement.[75] PRC narratives seek to downplay Japanese security concerns and portray Japanese efforts to increase its security as the efforts of warmongers. [76]

North Korea

North Korea is increasing its economic and media cooperation with the PRC. North Korea resumed excavation work at the site of the New Yalu River Bridge, which connects Dandong, PRC, and Sinuiju, North Korea, sometime between February 18 and 19. The project was abandoned in August 2020.[77] North Korea may be constructing a customs and immigration complex to complement the PRC facility on the opposite side of the bridge. The North Korean construction efforts may be linked to a PRC company's plan to establish a 300,000-square-meter special economic zone (SEZ) in Sinuiju.[78] The completion of this complex, whether it is a customs facility or an SEZ, would significantly enhance overland trade cooperation between North Korea and the PRC.

PRC state newspaper the *People's Daily* and the *China Media Group* (CMG) have reestablished their presence in North Korea for the first time since the COVID-19 pandemic.[79] Liu Rong, a correspondent of the *People's Daily* in North Korea, and Dong Haitao, the chief correspondent of CMG in North Korea, met with PRC Ambassador to North Korea Wang Yajun as well as representatives from North Korea's state newspaper Rodong Sinmun and the *Korean Central Broadcasting Committee* on February 28. PRC correspondents affirmed their commitment to increase cooperative exchanges with North Korean media and political representatives.[80] Foreign media outlets that operated in North Korea before the COVID-19 pandemic include the United States' AP, France's AFP, Japan's *Kyodo News*, PRC's *Xinhua News Agency*, *People's Daily*, and CCTV; and Russia's TASS.

A ceasefire in Ukraine may strengthen economic ties between North Korea and the PRC further. Russian Deputy Foreign Affairs Minister Andrei Rudenko visited Pyongyang on March 15, although North Korean state media did not report on the specifics of the discussions.[81] The visit likely involved discussions about a ceasefire, as Russian President Vladimir Putin had expressed support for the US proposal for a ceasefire in Ukraine just two days earlier, on March 13.[82] North Korea generates a significant source of revenue through illicit exports of missiles and ammunition, as well as sending soldiers, to aid Russia against Ukraine.[83] The PRC provides an economic alternative if the war in Ukraine ends.

North Korea began easing its COVID-19 pandemic restrictions in 2024 by reopening its border to certain foreign visitors, including diplomats and Russian tourists. It has also shown signs of allowing tourism for PRC nationals, as reported by the ISW on February 14.[84] North Korea's trade with the PRC saw an increase on-year, with total trade reaching 222.5 million US dollars in January and nearly 122 million US dollars in February, compared to 190 million and 121 million US dollars in the same months of 2024.[85] This suggests that North Korea may be aiming to attract foreign currency from the PRC now that COVID-19 no longer hampers bilateral trade. The PRC could view this as an opportunity to regain influence over North Korea, especially if it perceives that postwar relations between Russia and North Korea are weakening.

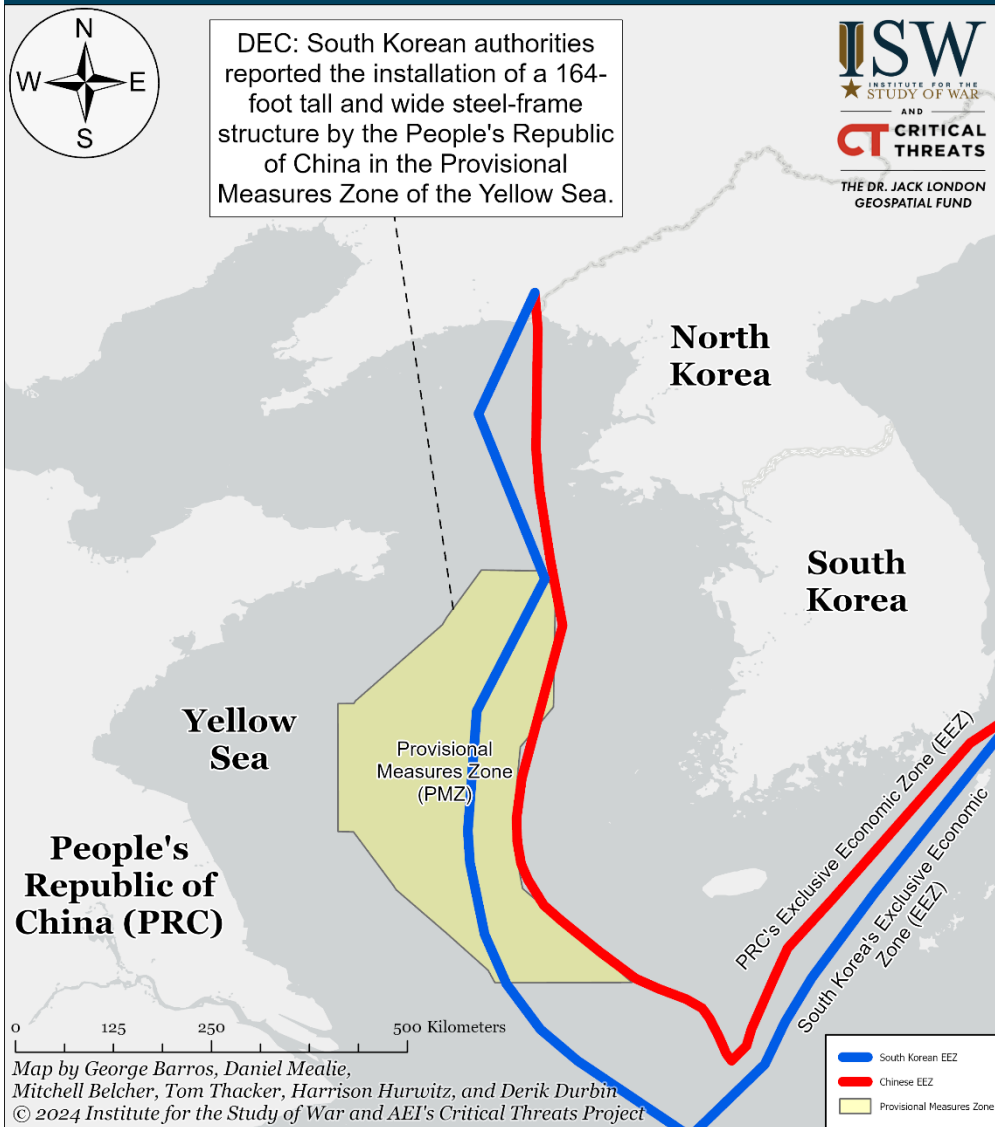
South Korea

The CCG blocked South Korean authorities from inspecting a PRC-installed steel structure within the bilateral Provisional Measures Zone (PMZ) in the Yellow Sea on

February 26. The PRC likely aimed to expand its territorial influence over the disputed waters amid South Korea’s political instability and leadership vacuum.[86] The South Korean Oceans and Fisheries Ministry sent the *Onnuri* marine research vessel to inspect the PRC structure in the disputed area. CCG ships, along with three rubber boats, prevented the *Onnuri* vessel from approaching the structure. South Korea dispatched a Coast Guard vessel in response, leading to a two-hour standoff. The CCG claimed that the structure was an aquafarm but refused to cooperate with South Korea’s request to verify this statement. The PRC constructed steel structures in April, May, and December 2024. South Korea and the PRC agreed to establish the PMZ in the overlapping area of their exclusive economic zones (EEZs) in 2000 in order to resolve disputes related to Yellow Sea fishing rights and oil exploration.[87] The South Korea-PRC joint agreement explicitly prohibits activities unrelated to fishing in the PMZ. The South Korean Foreign Affairs Ministry stated that it will ensure that the PRC does not infringe upon South Korea’s maritime rights.[88] The PRC Foreign Affairs Ministry stated that the PRC and South Korea are maintaining good communication and described the current situation in the Yellow Sea as “stable.”[89] The PRC’s refusal to cooperate with South Korean authorities is a rare escalation in this context. The PRC withdrew or suspended working on the installations when South Korea protested similar PRC activities in the past.[90]

The PRC may utilize maritime installations within the PMZ to territorialize the Yellow Sea, capitalizing on South Korea’s political turmoil following President Yoon Suk-yeol's martial law declaration in December 2024 and the vacancies of multiple high-level military positions.[91] The PRC officially justifies the installation of buoys and other structures as being for the purpose of maritime data collection and fishing activities. The Yellow Sea is within the PRC-claimed Nine-dash line. The PRC has used similar tactics in the South China Sea, building island bases that it eventually militarized.[92] The PRC can expand its physical presence and achieve similar strategic objectives in the Yellow Sea by gradually encroaching on the PMZ.

The Provisional Measures Zone and the Exclusive Economic Zones of the People's Republic of China and South Korea



Oceania

The PRC accused New Zealand Security Intelligence Service (NZSIS) Director General of Security Andrew Hampton of spreading false information after he expressed concerns regarding PRC activities in the Pacific Ocean. The PRC routinely deflects and denies concerns expressed by Five Eyes partner nations despite active efforts to gain military and political footholds in Oceania. Hampton addressed the New Zealand Institute of International Affairs on March 6, highlighting the role of intelligence cooperation in the Pacific, specifically between members of Five Eyes. Hampton said “The PRC’s ambition is to link economic and security cooperation, create competing regional architectures, and expand its influence with Pacific

Island countries across policing, defence, digital, disaster relief, and maritime spheres.”[93] The PRC Embassy in New Zealand called Hampton’s statement “baseless.”[94]

Hampton and the embassy’s comments follow a blue-economy cooperation deal between the PRC and the Cook Islands, which have free association with New Zealand. New Zealand authorities expressed concern over the deal, which they felt contradicted the compact of free association.[95] Hampton’s address noted that he had recently visited the Cook Islands and that New Zealand’s security service has “shared classified intelligence with them on foreign interference and espionage risks.”[96]

PRC information operations against New Zealand fall in line with broader PRC efforts to drive a wedge between Five Eyes partner countries. New Zealand is a member of the Five Eyes along with the United States, Britain, Canada, and Australia. New Zealand has faced criticism from other Five Eyes members over its largely economics-driven relationship with the PRC.[97] PRC criticism and accusations against New Zealand reflect PRC efforts to weaken US coalition-building efforts in the Pacific, where it seeks to expand its political influence.

Latin America

A PRC state newspaper condemned Hong Kong firm CK Hutchinson's sale of Panama Canal ports to BlackRock. The PRC may view the port sales as weakening PRC influence in Panama and, by extension, Latin America. United States-based asset management firm BlackRock agreed to purchase Balboa and Cristobal ports in the Panama Canal on March 5. BlackRock’s consortium will also buy CK Hutchinson’s controlling interest in 43 other ports globally.[98] Hong Kong newspaper *Ta Kung Pao* published two opinion pieces criticizing the sales on March 13 and 15. Hong Kong and Macao Affairs Office of the State Council and Liaison Office of the Central People’s Government in Hong Kong Special Administrative Region (SAR) — two official government entities — reposted the articles on their websites.[99] Hong Kong-based government bodies commented on the sales more directly than PRC bureaucracies did. PRC Foreign Affairs Ministry spokesperson Lin Jian said on March 5 that the ministry had “no comment” on BlackRock’s purchase of the ports. Lin said that “China supports its companies, including Hong Kong SAR companies, to invest and start businesses overseas” and that the ministry opposes “the abuse of coercion and pressure in international economic and trade relations” during a regular press conference.[100] Reports have emerged suggesting PRC officials’ disapproval of the sales, however. The *Wall Street Journal* cited unnamed sources who said that PRC President Xi Jinping had planned to use the ports to bargain with the United States and felt that CK Hutchinson had not properly consulted the PRC.[101] *Bloomberg* also cited anonymous sources who said that PRC leaders have told regulatory bodies, including the State Administration of Market Regulation, to investigate CK Hutchinson’s deal for potential violations.[102]

PRC disapproval of the port sales contradicts narratives suggesting that the PRC assigned no security value to the two Hong Kong-based ports. The PRC may interpret CK Hutchinson’s sale of the ports as a sign of diminishing PRC influence in Latin America. Panama declared that it would not renew its Belt and Road membership shortly after US Secretary of State Marco Rubio’s visit to Panama in February 2025. The PRC uses the Belt and Road Initiative (BRI) as a means of cultivating soft power ties via infrastructure agreements and economic partnerships. Panama was the first Latin American state to sign onto BRI in 2017, with other Latin American countries shortly following suit.[103] The PRC likely interprets the sale of the two Panama Canal ports, along with Panama’s plans to withdraw from BRI, as

a soft power win for the United States. The PRC sent a CCP delegation to visit Panama on March 16, indicating that the PRC is still prioritizing diplomatic relations with Panama.[104] The PRC will likely continue efforts to shore up its soft power in Latin America if it fears other countries will follow Panama's example and withdraw from BRI.

Iran

The PRC, Russia, and Iran issued a joint statement calling for an end to “illegal unilateral sanctions” on Iran. The PRC put forth a five-point proposal to resolve the Iranian nuclear issue and called for the United States to return to negotiations. PRC Vice Foreign Minister Ma Zhaoxu, Russian Deputy Foreign Minister Sergei Ryabkov, and Iranian Deputy Foreign Minister Kazem Gharibabadi met in Beijing on March 14 to discuss the Iranian nuclear issue. They released a joint statement that reaffirmed the 2015 Joint Comprehensive Plan of Action (JCPOA) nuclear deal, called for the removal of sanctions on Iran, and welcomed Iran's claimed commitment to a purely peaceful nuclear program and cooperation with the International Atomic Energy Agency (IAEA).[105] PRC Foreign Affairs Minister Wang Yi also put forth a five-point proposal to resolve the Iran nuclear issue, including opposition to sanctions and threats of force, respecting Iran's right to pursue civilian nuclear energy (but not nuclear weapons), and resuming negotiations based on the JCPOA including the United States.[106]

The PRC is using the Iranian nuclear issue to position itself as a responsible mediator and force for stability in the Middle East while framing the US withdrawal from the nuclear deal and “maximum pressure” sanctions against Iran as the true core of the problem. This diplomatic effort supports Beijing's ambition to be perceived as the true defender of the international order and champion of the Global South, in contrast to the United States. The PRC has framed its efforts at mediating a Saudi-Iran détente in 2023 and advocating for an Israeli-Palestinian ceasefire in 2024 in similar terms.[107]

Beijing has an interest in preventing instability in the Middle East that could threaten its economic interests, particularly vital energy shipments from Iran and other Persian Gulf states. The PRC imports around 15 percent of its oil from Iran. It thus wishes to prevent a regional war, a regional nuclear arms race, or the collapse of the Iranian regime. The PRC has supported Iran by buying 90 percent of its oil and providing it with certain military-use materials, including recent shipments of sodium perchlorate that can be used to make missile fuel.[108]

The timing of the PRC-hosted nuclear talks may be related to several recent developments in the Middle East and the United States, in addition to the planned expiration of JCPOA measures in 2025. First, US President Donald Trump sent a letter to Iranian Supreme Leader Ali Khamenei in early March that he said called for making a deal on the nuclear issue.[109] Russia offered to serve as a mediator between the United States and Iran.[110] Beijing likely wants to play a role in resolving this issue to its own benefit. Second, US media reported in February that Israel may strike Iranian nuclear facilities in the first six months of 2025, according to US intelligence assessments.[111] Third, US sanctions on Iranian and “shadow fleet” tankers may threaten PRC access to Iranian oil. The PRC has somewhat benefited from anti-Iran sanctions that have allowed it to buy Iranian oil at a significant discount. The new tanker sanctions may have offset the benefits of this discount, however, by raising the cost and difficulty of importing sanctioned oil into the PRC and threatening the viability of independent PRC oil refiners.[112]

The United States sanctioned Hong Kong-based vessels illicitly transporting oil to Iran. The PRC supports Iranian and Russian military efforts through its involvement in illicit supply chains. The US Treasury Department sanctioned a Hong Kong-based firm, Heshun Transportation Trading Limited, and one of its vessels — the Hong Kong-flagged *Peace Hill*. The Treasury Department sanctioned a Panama-flagged tanker, *Corona Fun*, for manipulating AIS data to cover shipments of Iranian oil and the San Marino-flagged vessel *Seasky* for moving fuel oil to the PRC on behalf of Iran’s national oil company.[113] These two vessels are owned by companies in Hong Kong and Shanghai, respectively.[114] The Treasury Department noted the sanctioned vessels’ roles in Iran’s “shadow fleet”, a network of ships used to deliver Iranian oil to the PRC.[115] The Treasury Department previously imposed sanctions on the Panama-flagged *Huihai Pacific*, also owned by a Hong Kong firm, for its role in a similar Russian “shadow fleet” of illicit oil shipments to the PRC.[116]

ISW has noted Hong Kong’s role in illicit economies that support PRC allies and partners. Hong Kong has emerged as a hub for PRC firms to circumvent sanctions on Iran, Russia, and North Korea, as its lenient regulatory environment facilitates relatively easy concealment of corporate ownership and the rapid creation and dissolution of shell companies.[117]

Conflict-monitoring group Conflict Armament Research (CAR) released a report finding that Yemeni authorities intercepted PRC-made hydrogen fuel cells en route to the Houthi-controlled port of Salif. The PRC may be providing the Houthis with limited aid as part of an arrangement to protect PRC ships. A CAR report revealed on March 13 that Yemeni National Resistance Forces (NRF) seized the pressurized gas canisters on a trading vessel in the southern Red Sea in August 2024. Markings on the seized cylinders indicate that they were produced by PRC manufacturers.[118] CAR did not identify the manufacturers or the ship, saying that it would continue its investigation. CAR found that the canisters were incorrectly labeled as “oxygen cylinders” likely to obscure their true purpose. The manufacturers advertised them for use in hydrogen fuel cell UAVs on their website and in accompanying transfer documents. Hydrogen fuel cells could improve the range, payload, and stealth of UAVs used by Houthi militants to target commercial shipping in the Red Sea, as well as US and Israeli military assets and civilian infrastructure in Israel and Saudi Arabia.[119][120]

The PRC may be helping to advance Houthi capabilities as part of an arrangement that protects PRC ships in the Red Sea. PRC officials have engaged in diplomacy with the Houthis to ensure the safety of PRC-affiliated commercial vessels transiting the Red Sea.[121] They reportedly advised the Houthis to avoid targeting PRC-affiliated shipping while continuing attacks on Western-linked vessels.[122] The PRC has called for an end to Houthi attacks but has generally refrained from directly criticizing the Houthis.[123] The PRC denied exporting drones or military technologies to the Houthis.

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