



A portion of the Simatai section of the Great Wall, about 75 miles northeast of Beijing—looking roughly southeastward into a cloud-shrouded China. Image by Wu Qiang, 2021.

China's Thickening Information Fog

Overcoming New Challenges in Analysis

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Introduction

China has been a “hard target” for the Intelligence Community (IC) since the founding of the People’s Republic of China in 1949. Escalating demand for assessments of China since the 2010s has spurred the IC to expand its analytical and collection efforts. Last year, Director of National Intelligence Avril Haines

identified China as the IC’s “unparalleled priority.”¹ CIA Director William Burns asserted this year that his agency has more than doubled its budget for China-related intelligence collection, analysis, and operations during his tenure, extending work on China to “every corner of the CIA.”² Even as the IC buckles down on

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China work, warning signs are emerging that the world is changing in ways that could disrupt business as usual. Washington's ability to anticipate developments in the US-China relationship and assess risks and threats to national security is likely to get harder.

Amid heightened tensions with Washington, Beijing has redoubled efforts to stiffen controls on information to prevent access by its potential adversaries. PRC authorities are mounting increasingly conspicuous counterintelligence activities, issuing public warnings of infiltration attempts by foreign spies and restricting the use of US technology, like iPhones and Teslas, due to purported surveillance threats.³ While heightened counterintelligence will concern operational elements of the IC, intelligence analysts are likely to be most aware of the mounting problems they face in accessing open-source information. Open source, while usually easier and cheaper to obtain than other intelligence sources, has gotten harder to gather when it comes to China.

Notably, journalists are struggling to obtain PRC entry visas, US researchers are confronted with more scrutiny and hurdles in their field work, non-governmental analysts have faced police investigations and even detentions, and their access to several essential databases has been limited by the PRC government. China specialists warn that their ability to gather

and evaluate information on China is constrained by Beijing's growing restrictions on data dissemination and international access to China.⁴ In 2023, historian Odd Arne Westad judged that "insights into decisionmaking in Beijing are harder to get than they have been for 50 years."⁵

These developments are alarming, but in historical context, hardly comparable to conditions 50 or more years ago. American journalist Edgar Snow, favored by Mao Zedong and granted extraordinary access to the inner circle of the Chinese Communist Party (CCP), wrote in 1962:

*Gaps in our information on present-day China seem limitless. The true state of China's industrial and agricultural economy, the general standard of living, rural and urban communes and the degree to which they may have added tension to her straining efforts to catch up, developments in science, education and cultural life, how China is governed and security measures used against anti-Communist opposition, the extent of China's military preparedness and self-sufficiency, are all in dispute abroad.*⁶

The IC, lacking Snow's access inside China, did not fare much better at the time. A study of declassified National Intelligence Estimates (NIEs) on China concluded that "in the early years

of the PRC, intelligence analysts enjoyed few advantages over their academic and journalistic counterparts on the inner workings of the Chinese Communist Party."⁷ Neither Snow nor the IC would anticipate the economic catastrophe resulting from Mao's Great Leap Forward.⁸ Storied CIA officer James Lilley recounted that his agency relied on anecdotal accounts from PRC refugees fleeing to Hong Kong and smuggled PRC newspapers to assess the deteriorating conditions in China.⁹

While IC and public insight into China increased after Mao's death in 1976, former State Department analysts Batke and Melton still observed in 2017 that "we know shockingly little about the men ... making decisions in Beijing."¹⁰

The IC, of course, is chartered to delve beyond publicly available information. The open-source world, albeit vast, will rarely provide insight on state secrets such as classified war plans and weapons systems or PRC activities in cyberspace, outer space, or underwater, activities that often require technical means to detect and evaluate. But for intelligence mysteries—those abstract puzzles without a concrete answer—open-source information usually contributes the foundational evidence for assessments. These include PRC leadership intentions, economic conditions, social-political trends, and military capabilities—the

essential context for evaluating national security threats.¹¹ With the executive branch, armed forces, and Congress increasingly making high-stakes decisions on China issues, the need for this information to inform public debate is greater than ever.

I argue here that China's recent restrictions on open-source information are significant and likely to increase further, but near-term actions by individual analytic units and longterm efforts at the federal

level could build resilience into US analytic capabilities. The following sections address:

- recent changes in information availability,
- drivers of further PRC restrictions,
- specific implications for IC analysis, and
- opportunities for analysts to thrive in changing conditions.

I interviewed specialists from federal agencies, nongovernmental organizations, news media, universities, and private sector firms. They included junior, senior, and veteran analysts with decades of experience and areas of expertise across PRC political, economic, technological, and military/security issues. This article was informed by their experience and perspective, but it does not necessarily represent a consensus view.

Indicators of an Information Lockdown

For years, any anecdote of a CCP information crackdown could be rationalized as a temporary adjustment, part of a historical cycle during which PRC leaders relaxed or tightened controls to suit shifting political objectives. Today's China may be breaking from this pattern: indicators are emerging of secular tightening across different information domains – a trend toward ultimately greater restriction.¹² To be sure, today's conditions are being compared to a recent high baseline in information openness. China analysts often recall the 2000s and early 2010s as the best period for obtaining open source information on China.

Restrictions during the Cultural Revolution of the 1960s and 1970s far exceeded in intensity and violence today's repressive measures against people and the spread of

information. The 1980s were a period of relative openness, up until the suppression of the Tiananmen Square protests in 1989, when unflattering international coverage provoked a media clampdown. But that was temporary, and Beijing relaxed many restrictions in the lead up to its entrance into the World Trade Organization in 2001. The expansion of the internet also led to a proliferation of online media and information resources. At the time of Xi Jinping's ascendancy in 2012, a tension existed between Beijing's efforts to increase restrictions in some areas of the expanded information environment, while in other areas making new efforts at government transparency.¹³ By the time of Xi's second term in 2017, his choice to restrict overall information flow had become clear.

Collapse of Domestic Journalism

Under Xi, the PRC news media, once a basic resource for tracking developments in China, has suffered heavily, experiencing a clear qualitative decline. In the Jiang Zemin and Hu Jintao eras, the CCP encouraged an active news media to help hold local officials to account.¹⁴ Since Xi's ascent, the CCP's influence on journalism has become increasingly oppressive and overt, pushing news outlets to highlight the positive role of the Communist Party, restricting topics permitted for public reporting, and removing editors and reporters who crossed into sensitive issues.¹⁵

Some observers highlight Xi's 2016 tour of state media outlets as a clear turning point, when he demanded "absolute loyalty."¹⁶ While to some extent this resembled

practices of previous PRC leaders, the CCP subsequently increased routine content filtering and instructions to news outlets on censorship, content removal, and bolstering positive narratives about China's governance.¹⁷

Between 2011 and 2017, 40 percent of Chinese investigative journalists left their jobs and 40 percent of those who remained were considering other careers, a phenomenon that scholar Maria Repnikova attributed to widespread professional disillusionment.¹⁸ Since then, space for investigative reporting and critical opinion in China has sharply diminished. Even reporting on pollution and environmental issues—once areas of vibrant media coverage—had come under pressure from central and local authorities by 2019.¹⁹

Still, PRC media remains essential for tracking breaking news, like natural disasters, and interpreting the CCP's intended message underlying often-turgid official statements. The silver lining of the regime's control over media means that content it allows will closely reflect CCP preferences and can serve as an indicator of change in policy.

Muzzled Voices in Hong Kong

The dwindling autonomy of Hong Kong—which intelligence officers once considered “the best listening post into Red



Hong Kong democracy advocate and media mogul Jimmy Lai was arrested under the PRC's new National Security Law in August 2020. He was charged with conspiracy to collude with foreign governments (including the United States) and to publish seditious material. © ZUMA Press Inc./Alamy.Stock Photo.

China”—deserves special attention.²⁰ Its vibrant and critical news media survived the early Xi era, continuing to offer a steady stream of “leaks, rumors, anecdotes, speculations, and sometimes fantasies and outright fabrications” on PRC politics, according to former CIA analyst Alice Miller.²¹

Press freedom began eroding in the early 2010s when PRC-based Alibaba purchased the mainstay *South China Morning Post* and then sharply declined with Beijing's forceful response to the 2019 protests in Hong Kong, including detention of opposition political leaders, and the application of the stifling National Security Law in 2020. That year, Hong Kong authorities arrested the owner and

chief editor of independent newspaper *Apple Daily*, which had been habitually critical of Beijing and Hong Kong leaders. The act led to the shutdown of the paper, television channels, and social media accounts.²²

The disappearance of the *South China Morning Post's* military reporter in 2023 after she had traveled to Beijing for an international security forum raised further uncertainty over the CCP's tolerance for the Hong Kong press.²³ Hong Kong reporters still operate with more independence than their mainland China counterparts, but their unique voice and insight is greatly diminished.

Reporting China by Zoom

Foreign journalists may have less fear of spoiling Beijing's favored narratives, but fewer can access China in person. Pandemic travel restrictions and the expulsion of 18 reporters from the *Wall Street Journal*, *New York Times*, and *Washington Post* in early 2020 left the US media footprint diminished.²⁴ The *New York Times*, which in 2008 could boast it had 12 correspondents in the country, had only two left by 2024.²⁵

In 2022, nearly 40 percent of foreign correspondents in China said that their sources were harassed, questioned, or detained, a figure up from 25 percent the year before.²⁶ Journalists faced increasing public hostility and warnings that their reporting may expose them to legal sanctions, civil lawsuit, or national security investigations.²⁷

With a diminished presence, the *Wall Street Journal* still managed to publish more accurate reporting on the CCP's plans for leadership appointments at the 2022 National Congress than any other major media outlet in China or elsewhere.²⁸

Sustaining such journalistic excellence will be a challenge, with many top reporters on China now based outside the PRC. Taiwan gained 63 foreign correspondents and 22 additional news organizations between 2020 and 2022,

largely due to PRC restrictions.²⁹ While this has increased media attention to Taiwan, Taipei does not offer the same perspective as reporting in Beijing. Reporters with prior experience in mainland China can stay in touch with their PRC contacts, but eventually they will likely be succeeded by journalists with little or no time on the ground.³⁰

Social Media that's Safe for Xi

China's media landscape is not just shaped by the quality of journalism, but by the efforts of PRC authorities to flood outlets with propaganda and censor unfavorable reporting. In 2013, Xi declared public opinion to be "a battlefield" and subsequently prioritized management of information and public opinion through coercion, censorship, and propaganda.³¹

Beijing, already well-practiced in managing traditional media, improved its ability to shape social media by centralizing internet management and regulation under the Cyberspace Administration of China, directly responsible to CCP leadership. Authorities reduced online anonymity, banned influential accounts with many followers, and even detained social-media users accused of spreading false information. Much of the candid social and political discourse in China moved from widely accessible platforms like Weibo (similar to then Twitter) to private discussions on WeChat (similar to WhatsApp).³²

Beijing's enhanced information capabilities were revealed during its response to the COVID pandemic, when the government manipulated social media discourse in ways that were complex, immediate, automated, and obvious to many PRC citizens.³³ Political scientist Jennifer Pan observes that the CCP mobilized state and party organizations to fabricate social media posts as if they were the opinions of ordinary people. Douyin (the PRC's version of TikTok) circulated "trending" videos that featured 40-percent CCP or state media content.³⁴

Beijing not only manages domestic voices but also controls content flowing into China. China's "Great Firewall" had blocked PRC-based access to many Western websites by 2010, including Google, Facebook, and Twitter.³⁵ More recently, Lu Yingdan and colleagues found quantitative evidence that the Cyberspace Administration encourages circulation of Western social media content in PRC channels when it expresses antagonism toward China and its people, seemingly to support the CCP's narrative that the United States and its allies seek to contain China.³⁶

Disrupting Desktop Research

Beijing's management of cyberspace goes beyond curating public perceptions to dynamic restrictions on online access and

official dissemination of data and information. This is particularly evident for researchers outside of China, who experienced a series of new disruptions in 2023. That year, foreign subscribers found their access blocked or limited to China National Knowledge Infrastructure—an archive of thousands of PRC-based academic journals, conference proceedings, statistical yearbooks, and graduate theses across all disciplines. Although some access was restored in 2024, it set back researchers and analysts who benefit from studying PRC-based scholarship. Some national security-related journals remained inaccessible.³⁷

Beijing also limited some foreign access to the Shanghai-based Wind Information database, which compiles PRC corporate registry information.³⁸ PRC sources that track data on vessels in Chinese waters reduced their input to global ship-tracking platforms, reducing a source for corroborating official data.³⁹ Chinese books with unique insight into the CCP and military became more elusive.⁴⁰

Beijing's changing policies have also disrupted the routine dissemination of official government data. From 2021, only a fraction of PRC judicial rulings continued to be published in Court Judgements Online.⁴¹ The Berlin-based MERICS think tank found that PRC ministries reduced their rate of publishing top-level policy documents from 88 percent in

2015 to 68 percent in 2022.⁴² This includes the decision to withhold public disclosure of the new Five-Year Plan on Science and Innovation.⁴³ MERICS also found that the volume of official government statistics is gradually receding after a huge expansion of PRC data dissemination in the 2010s that was meant to improve policymaking and attract foreign investment.

Beijing stopped publishing China's youth unemployment rate in mid-2023, attracting particular notice after the last data release showed joblessness of young adults jumping to a record 21.3 percent in June.⁴⁴ Data publication resumed in January 2024, showing a 14.9 percent youth unemployment rate.⁴⁵ Economic analysts disagree whether China's new data represent a better calculation method or obscure an important indicator of China's economic health.⁴⁶

Don't Pack Your Bags

Getting on-the-ground insight in the Xi era is much harder than it used to be. Beijing has restricted, disrupted, or discouraged foreign academic, corporate, and non-governmental researchers from conducting fieldwork and data collection in China. The 2018 arrest of two nongovernmental researchers from Canada (the "Two Michaels") and their nearly three-year detention cast a chill on the willingness of Western researchers to travel to China.⁴⁷ In 2021, Beijing banned MERICS, which employs about 20

full time China researchers, from travel to China or engagement with PRC entities.⁴⁸

Before the pandemic, academic researchers traveling to China already experienced increased restrictions, with about a quarter being denied access to archives and 9 percent approached by security officials.⁴⁹ American scholars returning to China since 2023 have encountered increased local hostility, fear, and distrust.⁵⁰ In 2023, only 700 American students visited China, down from 15,000 per year in the early 2010s.⁵¹ Scholars who attempt to conduct their research outside China are facing increased obstacles to accessing PRC data, statistics, and academic literature. Princeton Professor Rory Truex warns that this environment will inevitably "erode the quality of research on China."⁵²

Even the international business community—once warmly welcomed by the CCP—perceived new levels of hostility in 2023. Firms were reportedly concerned about new 2021 data security laws disrupting the exchange of routine financial information between PRC and foreign firms, exit bans placed on some foreign business executives in China, and the heightened scrutiny of corporate research.⁵³ Last year, the US Chamber of Commerce warned of heightened risk for doing business in China after PRC police questioned staff at the Beijing office of a US consulting firm and detained

staff at the Shanghai office of a US due-diligence firm.⁵⁴

Beijing is further disrupting dialogue and relationships between US and PRC citizens by restricting

engagement by PRC scholars and analysts. Since 2016, China's education ministry has required PRC academics to seek university approval for overseas trips and

collaborations. In 2020, universities began applying these rules even to online events held by international organizations, often barring scholars from virtual attendance.⁵⁵

More Restrictions: Raindrops or a Coming Downpour?

Most China analysts and scholars are concerned by Xi's restrictions but remain undaunted, often insisting that workarounds exist to obtain essential information.⁵⁶ But even if analysts and scholars are adapting to the current situation, this doesn't reckon with the prospect of Xi implementing further information restrictions. The underlying drivers of the restrictions—Beijing's and Washington's pursuit of security and a regime in China centralizing around the CCP and Xi himself—seem certain to continue.

Locking Down China

Xi Jinping's emphasis on China's internal security is the first main driver of PRC information control. He is not the first PRC leader to take on such security challenges or to manipulate the information environment. But Xi's smothering of freedoms in the financial hub of Hong Kong and drastic COVID lockdowns across Chinese society showed his willingness to risk China's economic growth and global influence to ensure absolute security.⁵⁷ Since the Tiananmen Square protests of

1989, PRC leaders have paid closer attention to the effect of news media on social and policy stability. China scholar Susan Shirk asserts that the CCP routinely manipulates the media to support its strategy of preventing large-scale social unrest, avoiding public leadership splits, and maintaining the loyalty of the military.⁵⁸

While Hu Jintao introduced some information restrictions, Xi's appointment in 2012 as CCP general secretary commenced an era of ever expanding propaganda and secrecy efforts, based on Xi's warning that the break-up of the Soviet Union was caused by a loss of belief and faith in its Communist Party.⁵⁹ Within a few years, the news media were cowed to strict adherence to Party lines – or silence – on top security issues including Tibet, Xinjiang, Taiwan as well as the tumultuous events of 1989. Pro-democracy protests in Hong Kong in 2019 and anti-COVID lockdown protests across China in 2022 spurred expansions of information control.

PRC restrictions on information have not been steady and

continuous, even in the Xi era.⁶⁰ In his first term, Xi implemented a new CCP transparency initiative, increasing the online publication of less sensitive official policy documents, judicial proceedings, and statistical indicators.⁶¹ Beijing even increased transparency on military affairs to encourage public support for the PLA's military modernization, and tolerated an online community of PRC defense wonks sharing intriguing insight into China's military activities.⁶² But these trends reversed by the 2020s, with PRC authorities expanding the boundaries for what constitutes "sensitive" information that should be kept from public view.

China's post-pandemic economic recovery disappointed many citizens, leading CCP leaders to perceive even sterile reports of negative economic data as a potential trigger of public discontent. Ironically, Beijing placed a public spotlight on the Ministry of State Security, China's main intelligence agency, which emerged in 2023 as a prominent social media voice for government policy, commenting even on economic matters. This sent an implicit signal that PRC

leaders perceived all manner of public discourse to be a potential national security issue.⁶³

Fear of Foreign Information Weapons

The second driver of information restriction is Beijing's perception of a heightened external threat, reinforced by Washington's explicit elevation of security concerns about China under the Trump and Biden Administrations. Xi declared that "Western countries—led by the US—have implemented all-round containment, encirclement, and suppression against us, bringing unprecedented severe challenges to our country's development."⁶⁴ Xi's concept of an "Overall National Security Outlook" sees internal and external security as interconnected, fearing that foreign forces might seek to stoke insurrection in regions like Xinjiang and Hong Kong, or stunt China's economic progress.⁶⁵

This reinforces Beijing's concern that information could be weaponized by China's adversaries. Beijing has claimed that foreigners are using open information to smear China, including publicized claims of human rights violations against Uyghurs, theories of a lab-leak origin for COVID, analysis of China's "Made in China" strategy for technological competition, and reports on China's military ambitions.⁶⁶ A new data security law in 2021 restricted transfer of potentially sensitive data abroad, with the Cyberspace Administration of

China directing data providers to restrict overseas access to information involving corporate-registration information, patents, procurement documents, academic journals and official statistical yearbooks.⁶⁷

US-China Security Spiral

Washington has also placed barriers on information flow between the United States and China out of concern for PRC espionage, and legal and illegal access to dual-use and commercially viable technologies. This third driver of restrictions is closely linked to the second, as China has responded to US restrictions with its own new barriers, either in purposeful retaliation or using the excuse to tighten security. For example, Beijing's limits on journalist visas for Americans were nominally a response to Washington's imposition of limits on the number of journalists from state and CCP-sponsored media allowed in the United States.⁶⁸ Beijing's restrictions on science and technology information coincided with Washington's expanded technology export regulations.⁶⁹ Increased federal scrutiny, and even espionage investigations, of students and researchers in the US who might be collaborating with PRC state entities has dampened US appetite for academic exchange and China studies as well as PRC citizens' comfort with US travel and study.⁷⁰ In 2021, Presidents Biden and Xi agreed to roll back some limits on journalist visas, but levels of news media access—especially by

Americans in China—is still greatly reduced.⁷¹

Who's in the Loop?

The fourth, and perhaps most important, driver of information restrictions are changes to the PRC political system, which is evolving to offer fewer sources of information and insight to begin with. Xi's tenure has seen Beijing move away from post-Mao efforts to strengthen state institutions alongside the party apparatus and develop a system of "collective leadership" that includes many officials in decision-making and consultations with non-governmental institutions and experts. The resurgence of party dominance, and the centralizing of power around Xi as CCP general secretary, means that important policies are decided in a smaller circle, and fewer individuals inside and outside the CCP having insight into leadership perceptions and policy deliberations.

US officials, journalists, and researchers used to obtain considerable value from interacting with PRC academics, diplomats, think tank researchers, party leaders, and senior bureaucrats who frequently had real insight into the thinking of top leaders.⁷² The access of these interlocutors (and their willingness to talk to foreigners) has declined as policy planning has been increasingly centered in secretive CCP organs like the Central National Security Commission.⁷³ Xi also prized centralization in his military reforms, reorganizing the PLA into

a tighter joint command structure. Among other things, this eliminated the seven military regions and their individual newspapers, which used to offer insight into lower-level PLA operational matters that is usually absent in the national-level PLA media.⁷⁴

The CCP has bucked procedural conventions since its last national congress in 2022, including unexpected personnel appointments and timing of party meetings that

have confounded even seasoned China analysts.⁷⁵ This year, Beijing declined to offer an annual press conference with Premier Li Qiang (the official PRC head of government) disrupting a 30-year practice.⁷⁶ Credible press outlets have published thinly-sourced, uncorroborated stories to shed light on the murky political situation, which risks potentially spurious claims filling Beijing's information vacuum.⁷⁷ The stranger mainstream articles

include accounts that Xi faced a reprimand from "party elders" over his policy choices, speculation that Xi schemed to publicly embarrass the elderly Hu Jintao when he was awkwardly escorted out of the party congress during a health event, and claims that Xi had commenced a "Stalinesque purge" across the CCP after the congress that demonstrated "feverish paranoia."⁷⁸

Maintaining Deterrence Amid Misperceptions

Losing independent insight into China, while facing a flood of state-sponsored information has real consequences for Washington's ability to navigate relations with Beijing. The US Defense Department claims to be increasing military and diplomatic activities along China's periphery and making major investments to support an "integrated deterrence" strategy.⁷⁹ The 2022 National Defense Strategy says this requires "tailored approaches to assess and manage escalation risk in both crises and conflict, including conducting analysis of escalation pathways and thresholds."⁸⁰ Xi's information control and increasingly centralized and secretive policy processes makes it harder to corroborate non-public sources and understand PRC thinking, perceptions, and red lines, posing a major challenge to satisfying this requirement. In a crisis, varying signals from different parts

of party, state, and military entities could be misinterpreted.

Evaluation of the perceptions and intentions of PRC leaders is already a contentious areas of analysis and scholarship. Should we focus on China's words or its actions? Should we highlight the CCP's internal messages or external messages? Does Xi reference Marxist doctrine to guide policy decisions or only to justify them? Should original Chinese texts or official English translations be authoritative? Analysts energetically debate these questions, even as they may be false choices. Ultimately, we will rarely know with confidence whether Beijing's decisions and statements reflect the view of individual officials, a consensus across leaders, or pragmatic reactions to a changing situation.⁸¹

On the other side of the deterrence equation is the potential for Xi and other PRC leaders to misperceive and misinterpret US words, actions, and intentions. In his 2023 study of Beijing's historical management of international crises, political scientist Tyler Jost finds that PRC leaders were more likely to miscalculate on use of force when they received poor information across fragmented or siloed institutions.⁸² Extensive censorship, information filtering, and discouragement of alternative views is likely to contribute to a worsening information environment in Beijing and increasing prospects for misperceptions.⁸³ US scholars report that their Chinese civilian and military counterparts acknowledge self-censorship and reluctance to report bad news to senior officials.

Searching for Money in the Shadows

Economic analysis provides insight into China's wherewithal and resource priorities for potentially challenging US interests, as well as Beijing's view on its expectations for prosperity and its influence on PRC economic actors. This requires having a good sense of growth rates and economic targets, where Beijing is making investments and subsidies, and sectors that Beijing is seeking to stimulate or slow down. Our ability to assess China's macroeconomic conditions and prospects depends on access to good data, and analysts worldwide depend on national and sub-national governments to collect, calculate, and report most data that bear on macroeconomic analysis. The late economist David Dollar said he primarily depended on IMF reports on China, and the IMF in turn depends on data from PRC authorities, which are affected by Beijing's openness and statistical capabilities.⁸⁴ Economists wage energetic debates over the extent to which China's GDP figures are accurate and reliable.⁸⁵ One consultancy with a particularly skeptical view estimated that China's economic growth in 2023, announced at 5 percent, was actually closer to 1.5 percent.⁸⁶

Some PRC government budgets are quite obfuscated; most analysts judge that publicly announced figures for the defense budget are a significant undercount.⁸⁷ At the

firm-level, recent PRC restrictions on corporate registry databases present obstacles for ascertaining the ownership structure and state/party connections of Chinese firms.⁸⁸ Even international firms operating in China are diminishing as a fruitful source for information and insight, given new data transfer regulations and discouragement of corporate research in China.⁸⁹

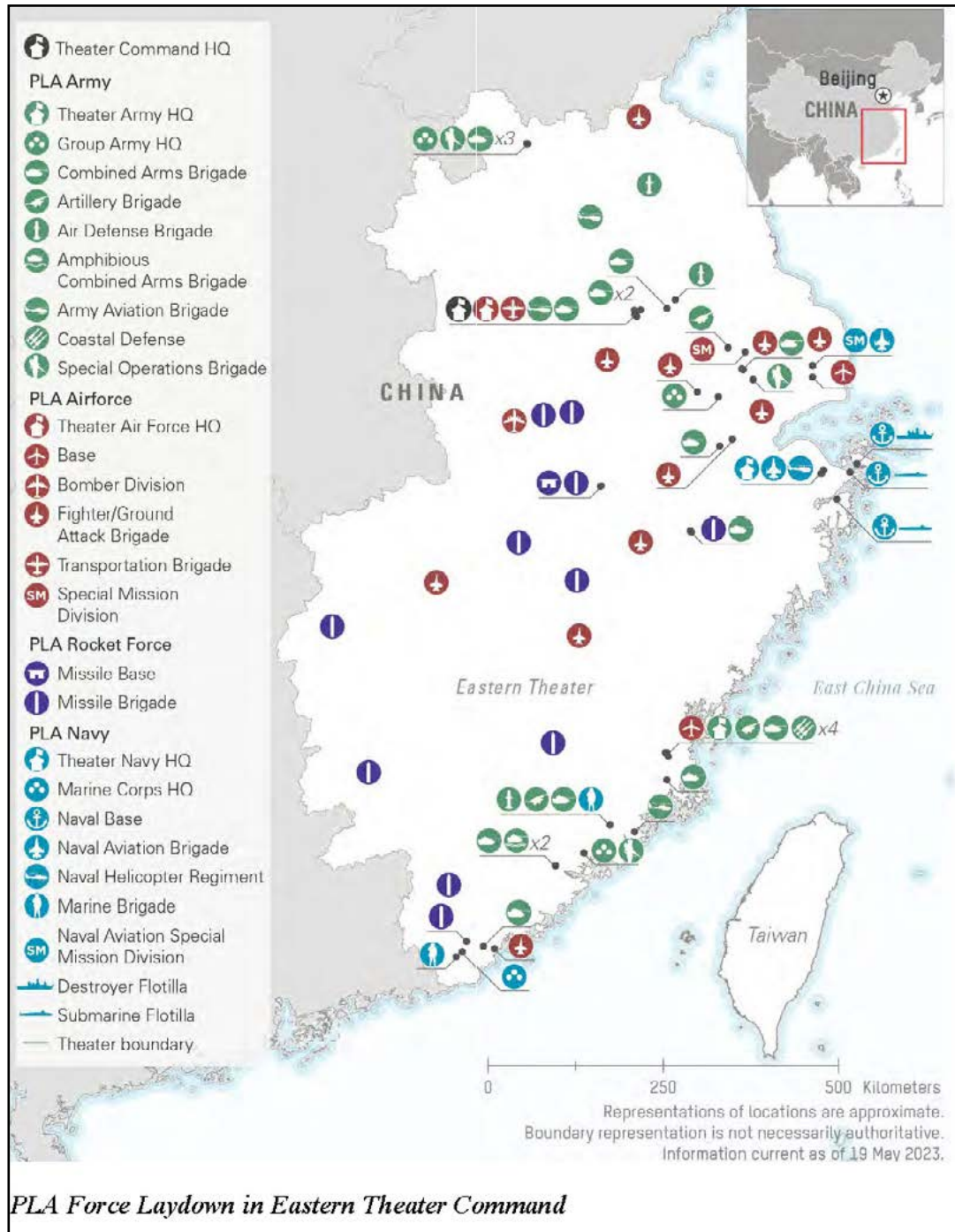
Roughly Estimating the Military Balance

Military analysis is an area where the IC and adjacent agencies of the US government can truly shine compared to analysts at non-governmental organizations. The Department of Defense, in particular, enjoys clear advantages in its ability to conduct accurate assessments of PRC military operations and capabilities highlighted by its annual release of a China Military Power Report (CMPR). (See following page.)⁹⁰ Beijing, once eager to show off advancements in PLA capabilities, has curtailed public knowledge of even routine exercises. Books and articles on Chinese military thought and doctrine have disappeared from bookstore shelves in China and online access since the 2010s.⁹¹ As of mid-2024, Beijing had not released a white paper on PRC defense policy since 2019, the longest gap to date between editions.⁹²

Some of the best public insight is available when the PLA conducts multinational exercises

or conducts operations directed at its neighbors. Mirrored data and reporting then becomes available from third-country sources, such as the Taiwan defense ministry's frequent press releases on PLA activity in the Taiwan Strait or reports from journalists on Philippine coast guard vessels who observe the PRC Coast Guard's intimidating actions in the South China Sea.⁹³ But this is insufficient for assessing developments in China's military capabilities, even for major weapons systems. Declassified NIEs indicate that the IC struggled to anticipate China's first nuclear test in the 1960s, and the 2023 edition of the CMPR revised upwards the Defense Department's projection for the size of the PLA nuclear arsenal.⁹⁴

Beijing's perception of Chinese capabilities and the military balance between the PLA and opposing forces is essential for its calculus on use of force.⁹⁵ This goes back to accurately understanding the perceptions and intentions of PRC leaders, which can mean the difference between judging China's emerging capabilities to be one risk among many for US interests, or a direct and urgent threat. The absence of routine public data on the PLA often leads to wildly variable speculation on intentions and capabilities.



This graphic is from the Defense Department's CMPR (page 120), the annual congressionally-mandated unclassified assessment of military and security trends in China. The report is intended to inform public debate on relevant policy and legislation.

Getting Smarter on Open Sources

Policymakers look to the IC to be resourceful, clever, and responsive to their needs. Persistence in producing policy relevant insights in spite of Xi's information control

is not only necessary and possible, but will increasingly distinguish the skill of the best China analysts and researchers. IC analysts and analytic units can take action in the

immediate to near term to enhance their resilience and success in a changing open-source environment.

Summary of Findings

Indicator	Trend since 2018	Likely Drivers	Major Impact	Opportunities for resilience
News media	More CCP influence on reporting, sharp increase in restrictions on foreign and Hong Kong media	Internal and external security concerns, centralization of decision making	Harder to anticipate leadership dynamics and policy adjustments across many sectors	Enhance tradecraft, adopt cyber tools, and emphasize rigor of analysis on existing information
Online access, social media	Dynamic and increasing restrictions on foreign access to PRC data and documents; increased CCP control of social media content	Internal and external security concerns	Diminished insight on PRC elite and mass perspectives and scholarship across issues of national security interest	Improve archiving, machine translation, and dissemination of digital material; enhance tradecraft, cyber tools, and rigor of analysis on existing information; protect fragile sources
Official data and documents	Declining dissemination of official information after a peak in 2010s	Mostly external security concerns	Challenges economic forecasts and anticipation of change across a range of policy areas	Methodically archive and analyze existing material; identify alternative economic indicators

But the prospect of non-IC analysts falling behind in their ability to assess important questions about China also needs to be addressed as a problem of national interest. The 2023 National Defense Authorization Act assigned at least five tasks to the IC to provide unclassified assessments on China, indicating the demand for cogent analysis to support public debate on the legislative process.⁹⁶ Some allied and partner governments may also struggle to stay aligned with Washington's perspectives, especially if they lack a deep bench of China experts, their Chinese and English language capabilities are limited, and credible information

on PRC risks and threats is not being communicated with their publics. There are some opportunities for policy, legal, and legislative action that Washington might consider to not only bolster governmental insight on China over the long term, but also to benefit non-governmental researchers and China knowledge among the general public.

Knowing What to Look for and Where to Find It

China analysts can become more productive with specific training in open source research. A massive amount of open source content

on China remains available and is almost certainly underexploited by the IC. Not all information is valuable; social media can offer insight into sentiment across Chinese society and favored CCP narratives while having limited relevance to analyzing PRC leadership and decisionmaking.⁹⁷ But PRC media can still alert the IC to breaking developments and indicate change in CCP policy. Chinese diaspora media, while uneven in reliability, sometimes publicizes activity that Beijing would rather keep quiet. One open-source training class does not prepare an analyst for life: data availability is dynamic and evolving, and one source may disappear just

as an alternative, perhaps better, source or analytic tool emerges.⁹⁸

With a little regular training and some incentive, analysts can become adept at knowing where and how to seek information relevant to their areas of expertise. Few will have time for comprehensive searches and daily browsing with an inbox full of taskings and demand for getting products to clients. But most analysts could implement a strategy for identifying indicators of change and a protocol for monitoring relevant sources, integrating open source tools into their normal research practices, balancing authoritative and non-authoritative information. This includes knowing how to distinguish between independent information and propaganda and how to evaluate each for meaning and insight.⁹⁹

Older methods of China analysis might be revived, according to former CIA media analyst Alice Miller, “by rigorously scrutinizing the content of [PRC] media, one could infer the regime’s goals and strategies.”¹⁰⁰ Today, data tools such as generative AI could be trained or customized to rapidly parse official documents and speeches, identify changes in language and substance, and propose initial interpretations. Such tools can aid productivity and identify areas for investigation but cannot yet substitute for an analyst’s expert knowledge, their ability to put datapoints into appropriate context, and make decisions on which sources to highlight in their analysis and why.¹⁰¹

Leaning into Analytic Tradecraft

Expert knowledge and analytic skills can derive cogent assessments from a fragmentary evidentiary base. But the IC’s messages and argumentation are going to be closely scrutinized and even criticized by some clients in the midst of high-stakes policy and budget debates on US-China relations. The IC can build resiliency by leaning into its tradecraft. This includes being explicit in the sourcing of information, identifying assumptions underlying analysis, and stating why alternative conclusions are ruled out.¹⁰²

Even if analysts apply rigorous tradecraft, use sophisticated tools, and enjoy wide access to data, subject matter expertise is still essential to putting datapoints into context. While urging technological and institutional innovations, former CIA analyst Peter Mattis reminds us that “the intelligence community will not be able to make reliable assessments of Chinese intentions without the input of the best strategic minds and close students of China.”¹⁰³ With fewer American students of China and the Chinese language, recruitment and retention of such talent may require greater effort.

Protecting Sources

With Beijing continuing to plug gaps in their information wall, the IC probably should consider declaring publicly-available sources worthy of protection as are its private sources. In 2023, two Washington think tanks took fire from fellow

China analysts for citing PRC open sources that were subsequently restricted by Beijing after they were used to assess national security risks of PRC activities.¹⁰⁴ While few China scholars favor changing standards for citing sources in their papers, the IC and US government more broadly might consider obscuring open sources perceived as being weaponized against China.

Some, like former Office of Naval Intelligence commander Michael Studeman, call for the IC to play a greater role in publicizing PRC “malign” activities and rapidly disclose material as “information fire” to counter PRC narratives.¹⁰⁵ Open-source information may be seen as cheaper cannon fodder than declassified secrets for such information operations, but the expected benefits of its use still need to be weighed against the risk of losing access. Protocols for protection of fragile sources and methods should be strongly considered.

Getting up close and personal

Many analysts and researchers identify decreased travel between the United States and China and the decline of direct exchange, dialogue, and collaboration with PRC counterparts as the most significant disruptions to insight on China issues. An on-the-ground view of contemporary China provides essential context for accurately assessing the behavior of PRC officials. US observers are sometimes only able to get critical insight on

China through direct, non-public governmental and non-governmental dialogue and exchange. Although the substance of official and state-sponsored exchange can be stilted or even scripted, it seems telling that economists at the US Federal Reserve calibrate their economic estimates based on context explained by Chinese officials in counterpart meetings.¹⁰⁶

High-level agreements between Beijing and Washington, clarification on policy and legal guidelines, and in some cases new funding would be essential to a recovery of governmental and non-governmental exchange. First, Beijing and Washington need to jointly commit to the safety of authorized researchers and analysts, given new fears among both US and Chinese travelers of cross-border scrutiny—and even detention—by authorities. For instance, the Schwarzman Scholars program continues to be an effective channel for Americans to study and research in China because it has high-level CCP endorsement.¹⁰⁷ One university scholar who once traveled extensively in China said he would only return if he was part of an official delegation.¹⁰⁸

Second, Beijing and Washington need to clarify legal guidelines for permissible cross-border collaboration and data-sharing. While there remain valid security concerns in specific sectors and disciplines, recent legal action by both governments has chilled academic exchange well beyond the scope

intended.¹⁰⁹ Third, the federal government probably needs to direct funding to encourage a revitalization of exchanges. This includes specific exchange programs with an official mandate and research grants specific to collaborative projects, to authorize and incentivize collaboration by PRC scholars and institutions that also perceive risks.

Back to the Stacks?

Lastly, mastering the exploitation of open sources requires a systematic approach to data management, obtaining materials, and consolidating archives. Even traditional library practices—widely perceived to be antiquated in a digital world—should be valued when it comes to China material. Social media and web posts need to be archived before they disappear under the hand of PRC censors or when Beijing decides to revise official documents and websites to mesh with changing CCP narratives.¹¹⁰

Hard copies of books and periodicals need to be saved in case digital access becomes further restricted. There may be opportunities for government, academic, and private sector entities to collaborate on consolidating collections of China materials in publicly-accessible collections and revitalizing academic area studies. Recent legislative proposals have included establishing a federal center for translations and dissemination of open source PRC material, that could be both responsive to IC needs and make products available to the

public.¹¹¹ International cooperation with allies and partners could also offer unique opportunities.

Promoting Analytic Resiliency and Expertise

Assessing trends in China will get harder as client's questions become more urgent and Beijing further obscures its intentions, perceptions, and capabilities. Open sources of information, whether China-based or international, will be an essential source for IC assessments as well public debate in the United States and allied countries on the future of US-China relations.

Individual analysts and agencies have room to become more adept and systematic at compiling and exploiting information available in the open source world. Adapting AI and other emerging technologies will enhance productivity toward this end, but will not substitute for the skill of subject matter experts to judge the veracity of a given datapoint, and put it into cogent context. Xi's efforts to manage perceptions of China have been impressive, but they are not impenetrable. Cross-border information flow is a national security imperative, and the stakes are too high for Washington not to push past these new barriers and get smarter on China. If given the chance, China analysts will have the drive and resilience to meet the mission. ■

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