

# Lessons from Others for Future U.S. Army Operations in and through the Information Environment

### **Christopher Paul**

for Christopher Paul, Colin P. Clarke, Michael Schwille, Jakub Hlávka, Michael A. Brown, Steven Davenport, Isaac R. Porche III, Joel Harding

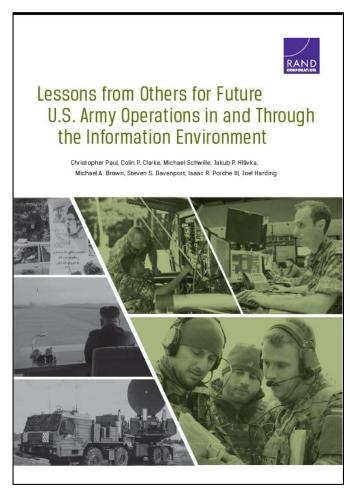
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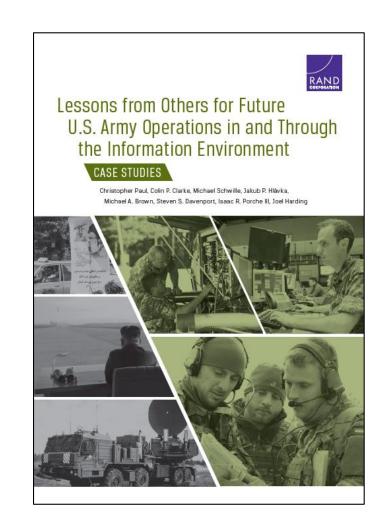
Overall Classification UNCLASSIFIED

## Background and Key Questions

- Technological advances and threat use patterns have wrought massive changes to the information environment (IE)
- In order to keep up, the Army must invest in new capabilities and practices
- To help identify investment and development targets, this study asked three questions:
  - 1. What practices or capabilities are being effectively employed in the IE by U.S. allies or in industry that the Army can adopt?
  - 2. What information-related practices or capabilities are used by adversaries or potential adversaries that the Army can adopt?
  - 3. What are adversaries or potential adversaries doing in this space that the Army must to be ready to counter?

## Research Conducted in 2016, Report Published this Year, In Two Volumes





Available at:

https://www.rand.org/pubs/research\_reports/RR1925z1.html

## Cases

- We've completed case studies of organization and capabilities to conduct operations in and through IE in:
  - Israel
  - NATO
  - Canada
  - Germany
  - China
  - North Korea (DPRK)
  - Iran
  - Russia
  - Hezbollah
  - Al Qaeda
  - ISIS/Daesh
  - Mexican drug trafficking organizations (DTOs)
- We've also studied:
  - US Army baseline (summary in associated FOUO brief)

## Bottom Line Up Front: Key Findings

- Most gaps between Army baseline and effective others are conceptual or capacity gaps
  - Conceptual gaps: others have concepts not employed by Army, or are free of U.S. ethical, statutory, or policy constraints
  - However, some others invest considerably more than we do in IRCs, so have greater numbers of personnel and systems (<u>capacity</u>); also demonstrates prioritization and increases prestige of IRC forces
- Effective practices and principles employed by others:
  - Generous resourcing of information power and information-related capabilities
  - Giving prominence to information effects in operational planning and execution
  - Increasing the prestige and regard of information-related capability personnel
  - Integration of physical and information power
  - Extensive use of information power in operations below the threshold of conflict
  - Employing the concept of getting the target to unwittingly chose your preferred course of action
  - Carefully recording and documenting one's own operations
  - High production values

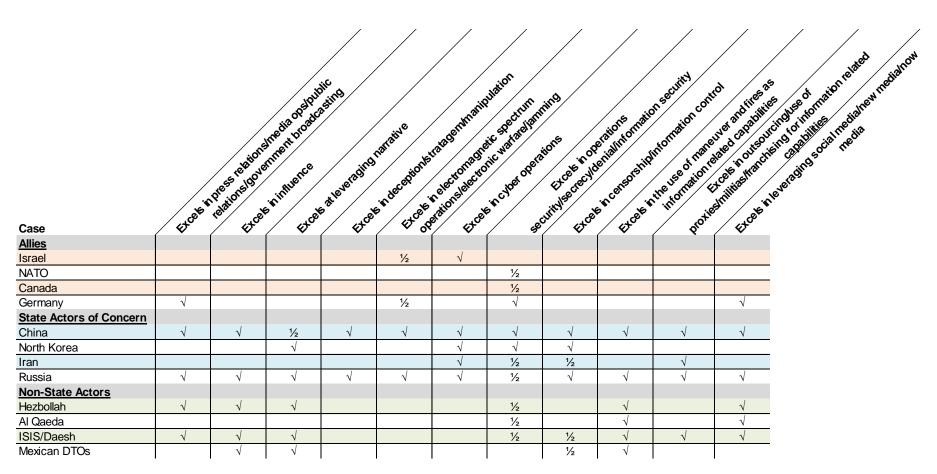
# Bottom Line Up Front: Recommendations (1 of 2) – Army Should Adopt Effective Principles and Practices, But Only Those that are Consistent with American Values

- Give effects in and through the IE more emphasis and priority
  - Change doctrine, training, and education to emphasize the role of the IE in operations
- Insist that physical combat power and informational combat power walk hand in hand
  - Change Army mindset/culture: IO as part of combined arms, kinetics have huge effects in the IE, too
  - Change doctrine, training, education, and planning processes to promote full spectrum of effects to affect adversaries and their supporters (destruction, attrition, demonstration of force, C2W, shaping legitimacy and support from relevant constituents)
  - Routinize and standardize the processes associated with IO and the IRCs to be consistent with and part of other routine staff processes (targeting, assessment, planning, etc.)
- Make it easy for soldiers' actions to support desired effects in the IE
  - In planning, tie political, physical, and cognitive objectives together coherently; communicate them clearly to maneuver forces

# Bottom Line Up Front: Recommendations (2 of 2) – Army Should Adopt Effective Principles and Practices, But Only Those that are Consistent with American Values

- In coordination with DoD and USG, seek expanded authorities to operate in the IE short of declared hostilities (gray zone/phase 0)
  - If effects in the IE are important in steady state/phase 0, need to bring capability out of the reserves
- Tear down or move the PA/IO firewall; don't allow PA to misrepresent, but don't excuse PA from integration with influence efforts and overall operational objectives
- Quantity has a quality all its own: take steps to close capacity gaps in key capability areas (cyber, influence, OSPEC/MILDEC)
  - Make IO/IRC career fields and MOSs larger, more attractive, and more prestigious
  - Consider making IO/IRC branches, not just functional areas; expand use of warrants
- Consider accepting some capability gaps relative to actors of concern
  - While ideally the US would be >= everyone at everything, that might not be affordable; evaluate risks and make tradeoffs

## Comparative Analysis: Capability Areas in Which Others Excel



#### KEY:

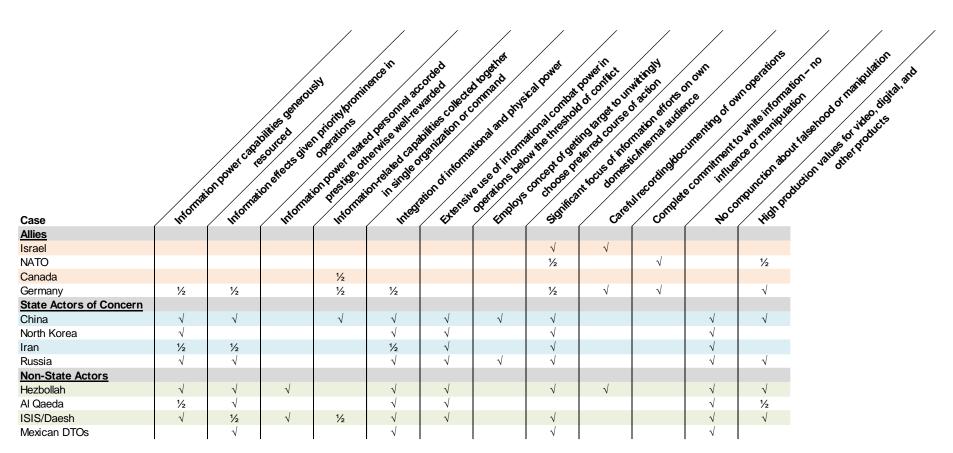
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## Comparative Analysis: Common Concepts and Principles Across the Cases



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## Case Example: Observations on Russian Efforts in and through the IE

#### **Distinctive features**

- The Russian "firehose of falsehood" propaganda model has four distinctive features
  - High volume and multi-channel
  - Rapid, continuous, and repetitive
  - No commitment to objective reality
  - No commitment to consistency
- Longstanding tradition of obfuscation (maskirovka) and manipulation (reflexive control)
- Information warfare at the forefront of Russian "gray zone" aggression
  - Early Ukraine an example: just enough obfuscation and ambiguity created to impose decision paralysis on the west until Crimea annexation a fait acompli
  - Significant propaganda aggression elsewhere in Europe (Sweden, Germany, Latvia, others)
- Effective use of proxies to support national security objectives
  - Financial investment and influence in media at home and abroad, hiring of internet trolls and providing cover for 'independent' hackers, support for candidates in foreign elections
- Uses propaganda against foreign and domestic audiences alike but targets them in an increasingly more sophisticated manner
  - Blurring of lines between intelligence, law enforcement and armed forces
  - Routine disregard for national or international law

- Research in psychology shows that the firehose of false approach is reasonably effective, and that the negative effects from falsehood and inconsistency are far less than we would like
- Gray zone aggression (aggression below the threshold of conflict but outside of routine competition)
  must be countered in the gray zone and fought at least partially in the IE current DoD authorities
  hinge too much on the false dichotomy between peace and war

## **Questions?**

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- Reports available at:
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### Observations on Israeli Operations in and through the IE

#### **Distinctive Features**

- Israel and the IDF face a near constant threat and as such, have the opportunity to test out new ideas and assess success/failure as well as the ability to adapt/evolve appropriately
  - Israel sought to learn from its experience against Hezbollah in 2006 when it launched
     Operation Cast Lead in late December 2008 against Hamas militants in the Gaza Strip
- One important gaffe committed by the Israelis during Cast Lead was to limit access of international media to the battlefield in an effort to control the message
  - Some argue that this decision backfired, as no independent media were available to refute Palestinian claims of atrocities and civilian targeting

- Elevation, combination, and coordination of efforts to inform and influence
  - The Israelis created a special study group, the "Winograd Commission," which recommended that Israel organize an information and propaganda unit to coordinate public relations across a wide spectrum of activities, including traditional media, new media, and diplomacy; emphasized the importance of getting closely related but functionally separate capabilities under a single umbrella and working across the whole of government
  - This longer term success or failure of these reforms are critical because efforts to communicate and inform must be coordinated across the entire government in order to avoid information fratricide and both document and explain operations to domestic constituencies and compellingly refute false claims that might undermine the support of the domestic constituency.
- Importance of embedded press, COMCAM, other sources of reporting and verification
  - Cast Lead reemphasized the importance of Combat Camera and the issue of transparency; when independent media are barred from reporting a story, it opens up space for the adversary to be "the only voice in the room"

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## Observations on NATO Information Operations

#### **Distinctive Features**

- Broad spectrum of activities coordinated at the NATO level as "Strategic Communications":
  - Public Diplomacy, Public Affairs, Military Public Affairs, Information Operations, Psychological Operations
- In NATO psychological operations, only "white" information used
- Psychological Defense discussed most intensely in the wake of Russian actions in Ukraine and Georgia:
  - Growing concern of member states in the East
  - Higher willingness to invest in cyber security and identifying cyber as a key domain at the NATO Warsaw Summit (2016)
- Most resources reside at the national level, NATO merely coordinates efforts
  - 28 member states, multiple audiences (domestic and foreign), over 50 partners and different doctrines and communication systems make this effort very complicated
- General IO expertise across the Alliance is not consistently resourced, lead nations include the U.S., UK, Germany, Estonia and Italy
  - IO is a staff function embedded in combat units rather than a capability in its own right

#### **Takeaways for Army**

- Emphasis on civil-military relations and separation of PA, PsyOps and IO may lead to better results on the ground as displayed in Kosovo and Afghanistan (PRTs)
- Integration and coordination of IO has received more attention and resources as new threats have emerged
- NATO's approach to Psychological Defense goes beyond traditional US IO ("... and protect our own") conceptually, but has not been fully elaborated

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## Observations on Canadian Information Operations

#### **Distinctive Features**

- Canadian Forces (CF) generally focus on interoperability with NATO and FVEY communities through tactical and operational influence activities, and has moved away from the U.S. model
  - CF as an enabling/supporting force, and IO/IRCs as enablers
- IO enterprise encompasses Influence Activities, Counter-Command Activities, and information protection activities, designed to affect the target's capability, will, and understanding
- There is no standing command dedicated to IO or IRCs, so enablers tend to be integrated on a situational basis, in many cases by Reserve Force personnel who are trained, but do not hold a specific IO or IRC-related military occupational specialty
- Canada not prohibited from using PSYOPS and CIMIC domestically and could do so with an approved request to Parliament
- Not overly focused on its individual narrative construction, as the nation's strategic communication efforts mainly centered on interoperability with partners

- Canadian Forces (CF) are starting to organize non-kinetic enablers including the Influence Activities Task Force (IATF) – all under one unit to cultivate synchronization in the information environment
- Routinizing and standardizing though the IRCs are usually not standing capabilities and are constituted when needed, Canada is trying to incorporate consideration of such capabilities in standard processes — for example, goal is to have IRCs included in the joint targeting enterprise by 2020

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## Observations on German Operational Communication

#### Complex history, new developments

- Scientific approach to information operations in Nazi Germany, widespread propaganda during Cold War, <u>strict rejection of "half-truths and lies" today</u>
- Have employed a range of concepts over time: psychological warfare, psychological defense, operational information and operational communication (today)
- Long track-record of operational deployment (Kosovo, Somalia, Afghanistan and Bosnia and Herzegovina), relatively large resource allocation
- Trains allied units (among top 3 IO powers in NATO with the U.S. and U.K.)
- New structure stood up in 2014: Center for Operational Communication (ZOpKomBw) to coordinate all information activities; focus on working with local populations, assessing perceptions and contributing to Bundeswehr's communications (but not to shaping domestic opinion)

- Historical example of European concept of Psychological Defense, different from US efforts on defensive IO
- Total commitment to truth from top to bottom eliminates PA/IO tension, one possible solution; still strong separation between foreign and domestic audience
  - But, creates challenges in supporting combat missions; positive trade-offs
  - Challenges remain in countering foreign propaganda

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### Observations on Chinese Information Warfare

#### Long history with a rising emphasis on information warfare

- The PLA is actively and aggressively pursuing efforts to persuade the US public and policy makers, acquire US technology, and counter US actions in the Information Environment
- Evolving doctrine that focuses on active defense and pre-emptive strike
- Differences in Chinese views of the international system, role of government and how they communicate
- Near peer competitor with a large investment in resources, technology and specialized manpower
- Massive reorganization increased focus on Theater Commands, JTF-like capabilities and new troops types (space troops, cyber troops, etc.)
- The Chinese view warfare as a spectrum and are developing concepts and capabilities to fight under 'informationized' conditions
  - 3 warfares, current operations, hacking operations

- Massive resourcing and elevated priority: Elevated role of information-related and other enabler forces into equivalent of a new service
- Staff relationships: Political Work Department (basically Commissars, but also with IO responsibilities) sit in the same special position in the staff charts that US PAOs sit

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**Biggest takeaways:** 

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## Observations on North Korean Efforts in and through the IE: Emphasis on Regime Survival

#### **Hermit Kingdom**

- DPRK is the most closed and security-conscious society in the world, they are experts at perception management and have focused on Information warfare capabilities and nuclear deterrence for regime survival
- Regime Goal is survival accomplished through fear, repression and 'cult of personality' around DPRK leadership
- Large Standing Army 5th Largest in the world, but have dated equipment, but have huge expenditures on cyber and nuclear capabilities
- Use nuclear deterrent, rhetoric and threats to keep international actors at bay; actions are carefully calculated for domestic and international consumption
- Tight OPSEC as a result of collective punishment and internment camps

#### **Lessons for Army**

- Because threats are one of the few realistic options available to the regime, messaging is closely coordinated and very focused – very specific target audience analysis
- Restricted internet: < 80,000 have access to the internet, systems are 'air-gapped' and controlled
- Dedicated system to train math and computer skills from a young age, only accept the best
- Large cadre of computer attack and defense units, redundant capabilities

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Biggest takeaway:
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#### Lessons for

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## Observations on Iran's Efforts in and through the IE

#### **Distinctive Features**

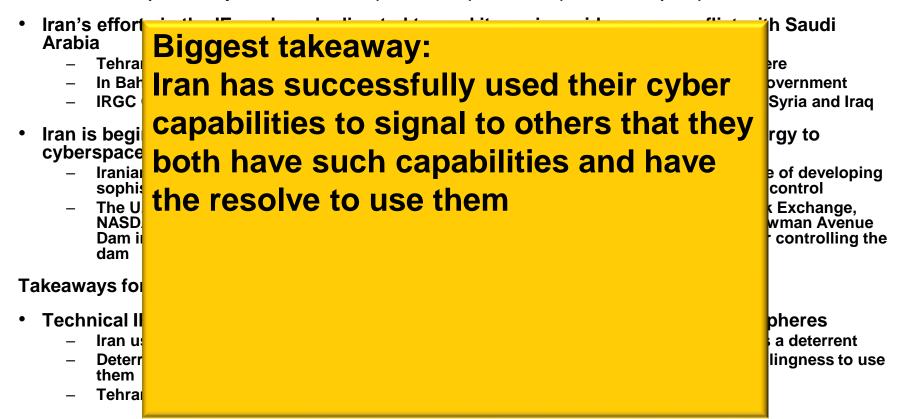
- Iranian efforts primarily focused on influence
  - Iran also conducts influence domestically to promote the view that Iran is targeted by the rest of the world, particularly the United States (Great Satan) and Israel (Zionist Occupiers)
- Iran's efforts in the IE are largely directed toward its region-wide proxy conflict with Saudi Arabia
  - Tehran supports Shiite populations in Iraq, Yemen, Lebanon, Syria, Bahrain and elsewhere
  - In Bahrain, Iran makes political statements in an effort to undermine the Saudi-backed government
  - IRGC Quds Force commanders and Hezbollah militants (supported by Iran) are active in Syria and Iraq
- Iran is beginning to devote a significant portion of its resources, attention and energy to cyberspace
  - Iranian hackers have progressed beyond website defacing or DDoS attacks; now capable of developing sophisticated software to probe US systems for vulnerabilities, inject malware, and gain control
  - The U.S. has accused Iranian hackers of conducting cyberattacks on the New York Stock Exchange, NASDAQ, Bank of America Corp., J.P. Morgan Chase & Co., AT&T Inc., as well as the Bowman Avenue Dam in Rye, New York, where hackers gained unauthorized remote access to a computer controlling the dam

- Technical IRCs for signaling, possibility of responding to aggression in different spheres
  - Iran uses cyber capabilities less for real aggression than to signal capability level and as a deterrent
  - Deterrence involves both having punitive capabilities and demonstrating resolve and willingness to use them
  - Tehran has used technical information-related capabilities in exactly this way
- There may be opportunities to counter Iran's narrative that it is a victim of American aggression
  - Iran has brutally suppressed opposition figures in its own country (e.g. 2009 Green Revolution)
  - Iran has squandered blood and treasure in Syria propping up Assad

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### Observations on Hezbollah Efforts in and through the IE

#### **Distinctive Features**

- Hezbollah operations in the IE are noteworthy, receiving high marks in more than half of the listed capability areas analyzed for this study (information power capabilities generously resourced, Information effects given priority/prominence in operations, integration of informational and physical power, careful recording/documenting of own operations, and several others)
- "If it wasn't captured on video, it didn't happen" is the mantra by which Hezbollah operates
- Hezbollah has the resources to pursue relatively sophisticated IRCs and is continuously seeking to upgrade these capabilities and evolve/adapt
- Hezbollah diversifies its media operations and relies on a wide range of platforms to communicate Its messages, making it difficult to blunt the group's efforts to influence, inform & persuade
  - In addition to Hezbollah's television production, the group makes use of new media and information technologies, including its widespread presence on the internet

- Priority/prominence in operations: The emphasis on information is embedded in planning at all levels and inculcated in the culture of the military arm of Hezbollah
  - Hezbollah carefully focuses on specific themes, e.g. proportionality
- Integration with operations: More than any other non-state actor, Hezbollah appreciates the importance of efforts in and through the IE and treats them as a "warfighting function"
  - Hezbollah's operational principles and their principles for operations in and through the IE are one in the same
- Responsive opportunism: Hezbollah is always ready to take best advantage of whatever the operating context and different actors therein give them
  - This is enabled by the group's structure, the prominence it affords IRCs and the culture it has established with respect to operating in and through the IE

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## Observations on Al-Qaeda Propaganda Efforts

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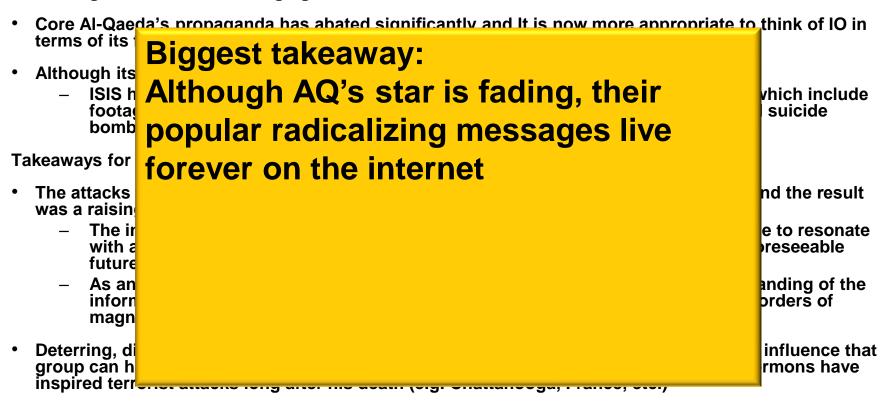
- Al-Qaeda's media production is sophisticated, both aesthetically and historically, however its messages are often wide-ranging and unfocused
- Core Al-Qaeda's propaganda has abated significantly and It is now more appropriate to think of IO in terms of its franchise/affiliated groups (e.g. AQAP, AQIM, Shabaab)
- Although its propaganda has slowed down, it lives forever on the internet
  - ISIS has clearly learned from, improved upon and surpassed Al Qaeda's tactics, which include footage showing attacks on U.S. troops, Al-Qaeda militants assembling IEDs, and suicide bombers martyrdom tapes, complete with anti-American and anti-Israeli vitriol

- The attacks of September 11, 2001 were a spectacular display of Al Qaeda's capability and the result was a raising of the bar in terms of "propaganda of the deed"
  - The integration of informational and physical power has led this attack to continue to resonate with aspiring jihadists and will likely play a role in Al Qaeda propaganda for the foreseeable future
  - As an organization, Al Qaeda has consistently demonstrated an intuitive understanding of the information value of kinetic operations and the fact that kinetic actions can have orders of magnitude greater impact on the IE
- Deterring, disrupting or destroying the physical organization does not put an end to the influence that group can have, as evidenced by the popularity of Anwar Al-Awlaki, whose YouTube sermons have inspired terrorist attacks long after his death (e.g. Chattanooga, France, etc.)
- Media distributed by violent non-state actors like Al-Qaeda can reinforce the group's strategy while also having a more tactical effect, e.g. conveying instructions on how to construct home-made bombs in *Inspire*, the manual used by the Tsarnaevs to build the bombs used in Boston Marathon attack

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## Observations on ISIS Efforts in and through the IE

#### **Distinctive Features**

- While much of the analysis surrounding ISIS is hyperbolic, its propaganda has been effective
- Islamic State propaganda is varied, not just about violence, although violence is instrumental to building the ISIS brand and attracting recruits; "Caliphate" is a powerfully resonant theme
- Structure matters: wilayats (regional franchise outlets) put out more propaganda than ISIS central
- Targeted to specific demographics and nuanced understanding of tactical to strategic messaging

- Among the nonstate actors, ISIS ranked high in more than half of the listed capability areas
  - These included: Excels in press relations/media ops/public relations/government broadcasting, High production values for video, digital, and other products, highly skilled in leveraging social media/new media/now media, & others
- Resourcing: ISIS media unit has 100+ operatives incl. hackers, engineers and recruits w/ prior experience in media, production and technology
- Integration: ISIS media units combine the equivalent of cyber, PA, and MISO in a single integrated organization/capability
- Priority/prominence in operations: Information is given the same priority as battlefield acumen and information power related personnel are accorded high levels of prestige
  - Senior media operatives are given the title "emir," of equal rank to their military counterparts
  - Videographers, producers and editors enjoy high status, salaries and living arrangements that are the envy of ordinary fighters

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## Observations on Mexican Drug-Trafficking Organizations (DTOs) and Their Efforts in and through the IE

#### **Distinctive Features**

- Mexican DTOs represent a constantly changing set of competing organizations, which share similarities but are different in some key ways, e.g, extent of de-centralization, presence or lack of an ideological mission, and reliance on drug trafficking revenues.
- DTOs fight a constant four-front war: against each other, law enforcement, vigilante groups, and the local population in controlled territories (if not placated by other means)
- Most (but not all) DTOs are non-ideological, concerned primarily with generating revenue

- Kinetic operations balanced between kinetic effects and effects in and through the IE: kill a competitor and intimidate a possible competitor; kill a defector and make clear the consequences of defection; etc.
- Without any integrating or coordinating function, DTO messaging surprisingly consistent and on theme down to the level of the lowest foot-soldiers
  - Intimidation and violence are the message
  - Protecting reputation and dealing out prescribed consequences are baked in to culture, part of indoctrination; totally understood by "line" forces
- Reputation is extremely important to DTOs, so they follow through on threats in a public fashion
- DTOs' typical response to actions in the IE retaliation becomes infeasible when authorship cannot be attributed

## Observations on Mexican Drug-Trafficking Organizations (DTOs) and Their Efforts in and through the IE

#### **Distinctive Features**

- Mexican DTOs represent a constantly changing set of competing organizations, which share simi lization, **Biggest takeaway:** presence d evenues. DTOs fight Without even trying, Mexican DTO ailante groups, an ther means) enforces generate effective supporting Most (but r ting revenue information as part of their routine Takeaways for efforts, because the violence is the Kinetic ope the IE: kill a competit lear the message consequer Without an ly consistent and on the Intim **Prote** to culture. part o
- Reputation is extremely important to DTOs, so they follow through on threats in a public fashion
- DTOs' typical response to actions in the IE retaliation becomes infeasible when authorship cannot be attributed