Information Warfare
Farwell, James P.

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Information warfare is about communication strategy. Forging and executing effective strategy requires avoiding the trap of allowing academic definitions to obstruct the operational requirements. It is about managing information and communication technology to gain a competitive edge. It embraces more than language. It entails the use of language, action, symbols, and images to shape perceptions and influence attitudes and opinions to change behavior in the interest of achieving a desired end state or effect.

Strategy requires a well-defined, clearly understood picture of success. Influence planners must be part of developing a strategy from the outset. The key steps are:

- Define winning or success. What is the desired outcome?
- Define the specific effects to be achieved, especially as a kinetic effect may be no different than a nonkinetic one.
- Figure out where to acquire the knowledge necessary to forge a winning strategy.¹
- Develop your strategy.
- Develop plans for operations that will carry out the strategy.
- Develop the tactics—combined to form operations—that implement a strategy.
- Define metrics so that you can measure success or failure.

Define What Constitutes Winning or Success

In elections, it is easy to define success: you win or you lose. The candidate is elected or a proposition put to a referendum vote passes or fails. Only in the game of horseshoes does one receive prizes for second place.

Legislative battles often afford clear-cut goals. Either desired legislation passes, fails, or passes in an amended form. The definition of winning in a legislative battle, however, is generally pretty clear to the interested parties.
National security policies are notorious for their lack of clarity at the strategic, operational, or tactical levels and the failure to take these into account when forging strategies. Partly, this stems from the diverse agendas that drive the goals of warfare, which can make it difficult to define the goals being fought for. In forging strategy, it is vital to discern what distinctions exist among coalition partners or key players regarding their covert and overt goals.

Partner and key player goals may differ dramatically and they may, along with the means used to forge alliances, affect the complex relationships between the parties. Engagements and conflicts we are likely to encounter during the next two decades seem likely to stress the need to build coalitions among or between states, organizations, and nonstate parties. Coalition building and maintenance is a complicated, nuanced process, and information strategy lies at its heart.2

This book’s introduction cites the tactical battles of Fallujah as a core example of why and how clear purpose matters. Adroit information warfare by insurgents cost Coalition forces the first battle as Marines were about to achieve military success. Coalition dominance in both spheres netted victory in the second battle. As a tactical operation, the second success was brilliant. Yet, at the operational level in Iraq, it produced serious blowback that led many to fear that the war would be lost. The strategic situation may have mandated fighting the battle, but failure to forge and execute an effective, clear-cut national strategy that anticipated and considered Iraqi reaction to battles such as this cast a shadow. Indeed, although in 2005 the U.S. Marines began turning things around in al-Anbar Province, a dismal air of gloom prevailed in many quarters.

The 2003 Iraq War itself is a case study in what happens when there is a failure at the outset to define winning. Some favored ousting then-Iraqi president Saddam Hussein to prevent his acquisition or use of weapons of mass destruction (or as the military terms them, chemical, biological, radiological, nuclear and high-yield explosives). Lieutenant General F. John Kelly talked about establishing democracy in Iraq—a very different goal.3 The Department of State had a plan it called the Future of Iraq, but whatever its merits, which were debated, this plan sat on a shelf. The Department of Defense took over planning for Iraq but failed to define what constituted winning or success.4 Senior commanders developed sharp differences with the White House and Secretary of Defense Donald H. Rumsfeld about how events in Iraq were unfolding and what success was achieved.5

Skeptics have worried that the U.S. effort in Afghanistan has lacked a clear definition of success or a desired end state or even a coherent strategy for winning. The Special Inspector General for Afghanistan Reconstruction (SIGAR) has concluded that between 2001 and 2017, U.S. efforts to stabilize insecure and contested areas failed. SIGAR blasted the failure of military and civilian parties to coordinate effectively.6

The International Security Assistance Force (ISAF) defined its mission as supporting the government and growth in capacity of the Afghan National Security Forces and facilitating improvements in governance and socioeconomic development to provide a secure environment for sustainable stability that is observable to the population.7 Former Secretary of Defense Robert M. Gates expressed the mission as to “deny the Taliban momentum and control, facilitate reintegration, build government capacity selectively, grow the Afghan security forces, transfer security responsibilities, and defeat al Qaeda.”8 He argued that end state was vital, as Afghanistan had status as a base
for extremist jihadism where native and foreign fighters had defeated a superpower and caused its collapse at home. Gates argued that a Taliban victory would strengthen “extremist Muslim mythology and popular perceptions of who is winning and who is losing.”

A joint statement in January 2013 by President Barack H. Obama and Afghan President Hamid Karzai seemed consistent with ISAF’s pronouncement. Others have suggested, less formally, that the United States would be satisfied to ensure that Afghanistan does not serve as a safe haven for terror networks or al-Qaeda. At the time of this writing, negotiations between the United States and the Taliban have focused on securing a withdrawal of U.S. forces in exchange for a commitment by the Taliban to prevent terrorist organizations from using the nation as a launchpad for terrorist activities elsewhere. Although presented to the American public as a negotiation for a peace accord, the Taliban has long been willing to negotiate with the United States, as long as the discussion is confined to two topics: returning Taliban prisoners and withdrawal from Afghanistan of U.S. and Coalition forces. Not surprisingly, former ambassador to Afghanistan Ryan C. Crocker, among others, has denounced the deal as a surrender. Interestingly, there is no evidence that even should the Taliban try to deliver on such a commitment that it has the power to do so in a nation with a large number of competitors for power.

One aspect of the Afghanistan quagmire—a war that has gone on longer than both World Wars and Korea combined—has been the absence of a coherent political/military/diplomatic strategy for winning.

The SIGAR report sharply criticized the failure of U.S. military and civilian parties to coordinate effectively. It blasted the U.S. government for failing to forge or execute a cohesive strategy for allocating military or civilian resources. In short, there was never a workable, defined strategy for winning. It bears stressing: a clear definition of the mission and the desired outcome, tactically, operationally, and strategically—bearing in mind that tactical units like special operations forces (SOF) often create strategic effects—directly affects the narrative, story, theme, and messages that govern and drive what is done, when, and how.

**Determine Where to Acquire Necessary Knowledge**

Figuring out where to acquire the knowledge to forge a winning information strategy is vital. World War II planning offers a classic example; the Iraq War provides a modern one.

- **World War II:** President Roosevelt’s Army chief of staff, George C. Marshall, appointed Lieutenant Colonel (later general) Albert C. Wedemeyer to develop the Victory Program in 1941, which became the blueprint for how to defeat Nazi Germany. Wedemeyer’s first task was to find out where he could find the information required to create the program. He succeeded. Wedemeyer’s imagination and disciplined effort made a difference.

- **Iraq:** General Petraeus needed to divide his time among various political activities to gain critical knowledge that enabled him to make and implement decisions. For example, he spent 30 percent of his time with Iraqi leaders, 30 percent in the field, 10 percent at headquarters, and 30 percent on matters relating to Congress and the executive branch in Washington.
Define Your Strategy

Military, information operations, and strategy expert and retired U.S. Army special operations officer Jack C. Guy, who currently serves on the faculty of the Joint Special Operations University, thinks of strategy this way: “strategy equals ends plus ways plus means.”

A U.S. Army War College publication states that “strategy is about how (way or concept) leadership will use the power (means or resources) available to the state to exercise control over sets of circumstances and geographic locations to achieve objectives (ends) that support state interests. Strategy provides direction for the coercive or persuasive use of this power to achieve specified objectives.”

The means include, as Guy points out, the essential elements of power such as diplomacy, information, military, and economics (DIME), “but the key is the objective or the ends.”

There are other definitions to think about. B. H. Liddell Hart famously defined strategy as “the art of distributing and applying military means to fulfill the ends of policy.” In that view, invading Normandy was a strategy for defeating Germany in World War II.

Clausewitz, whose classic work On War is heavy on philosophy, is more often quoted than illuminating. He states, “Tactics is the theory of the use of military forces in combat. Strategy is the theory of the use of combatants for the object of war.”

Clausewitz focused on victory, not peace. He adhered to Napoleon’s view on victory, as well, perhaps forgetting that Napoleon wound up on Saint Helena in the South Atlantic. He agreed that strategy is an instrument of policy. His conception of grand strategy related to his views on the center of gravity: a point in the enemy’s organism—military, political, social, etc.—that if lost or defeated, collapses the enemy’s national will. In his general principles of war, strategy aims to defeat an enemy’s center of gravity, which forms the basis of an opponent’s power at the operational, strategic, or political levels.

Clausewitz considers strategy in the context of three objectives for war: (1) defeat the enemy’s armed force; (2) gain possession of the enemy army’s material elements; and (3) gain public opinion. Where Clausewitz stands out is in articulating his holy trinity of principles that determine the outcome of warfare: “passion, chance, and reason.” Passion, including hatred and animosity, is a characteristic of the people. Chance and probability fall into the realm of the commander and their army; the quality of reason (political purpose), to which war is subordinate, is primarily the concern of government.

As King’s College, University of London, professor David Betz points out, “war itself has not changed,” although changes in technology have complicated its dynamics.

Critics such as Major General J. F. C. Fuller argue that Clausewitz focuses too much on violence rather than what should be the real end of conflict: the achievement of peace. Still, Clausewitz acknowledges that political objectives should determine the aim of military force and the effort to be made, although he saw war and politics as parallel as well as separate but related activities.

Commentators such as B. H. Liddell Hart suggest that Clausewitz’s insistence on destruction of the enemy no matter what is easy to misconstrue. Hart declares, “The object in war is to attain a better peace—even if only from your own point of view.”

Colonel Thomas X. Hammes places the debate about strategic purpose in the context of Fourth-Generation Warfare (4GW). In his view, that unfolds over a timeline that exceeds the duration of a single event and is rooted in the understanding of a strategic situation. Fourth-Generation Warfare’s
aim shifts away from the destruction of enemy forces to influencing political decisions. Hammes argues that it is to convince the enemy’s political decision makers that their strategic goals are either unachievable or too costly for the perceived benefit. It is an evolved form of insurgency. Still rooted in the fundamental precept that superior political will, when properly employed, can defeat greater economic and military power, 4GW makes use of society’s networks to carry on its fight. Unlike previous generations, it does not attempt to win by defeating the enemy’s military forces. Instead . . . it directly attacks the minds of enemy decision makers to destroy the enemy’s political will.31

Retired Israeli Defense Forces Brigadier General Shimon Naveh views strategic campaigns as a “complex of operations and actions, aimed at accomplishing a strategic goal. . . . The campaign, like the theatre, is related to a comprehensive aim and a defined framework of time, space, and force.”32 Strategy allocates resources and provides a framework for articulating operations and tactics that achieve defined strategic aims. Naveh’s approach is sophisticated and nuanced.

Naveh argues not for destruction of an enemy, but inflicting “operational shock” that defeats an enemy’s ability to achieve its aims and knocks out its operational equilibrium. Successful operations attack the enemy’s center of gravity by identifying exact points of enemy strength and weakness; creating operational vulnerabilities; and exploiting those through maneuvering strikes.33

Chinese Colonels Qiao Liang and Wang Xiangsui echo that argument in contending that information warfare needs to focus on a maximum point of impact through the choice, timing, and combination of a strategy’s dominant orientation, spheres of operation, tools, means, and directions.34 In their view, future strategy—including information warfare—needs to reimagine the scope of dominant tools available to achieve the ends of warfare in seeking to secure desirable outcomes other than physical destruction of an enemy. As one looks over the horizon, one cannot rule out kinetic conflict between states. But as the Chinese strategists ably observe, state aggression may well prove better deterred or defeated by economic, diplomatic, and other nonkinetic strategies and tactics.

Naveh’s notion applies to information warfare, which aims to defeat the enemy’s ability to achieve its goals. Destruction may be a goal of warfare. Savvy commentators like British general Rupert Smith draw a distinction between confrontation and conflict. Confrontation aims to change an enemy’s intention. Conflict aims for destruction.35 In his view, use of force may instead aim for containment, deterrence, coercion, or destruction.36 Smith argues well.

The point of using force may or may not be destruction. But as Naveh points out, strategically, destruction may not be an achievable or intended outcome of conflict. Naveh argues that victory is better achieved by frustrating enemy capabilities and the adversary’s ability to achieve its aims. Smith recognizes that where there is war among people—Bosnia and Iraq offer good examples—“information, not firepower, is the currency upon which it is run; and information is neither purely military nor purely political.”37 From that perspective, “military force can only achieve tactical results.”38 What matters is the political objective. Achieving that requires intelligent integration of information strategy.

One may leave to military theorists different definitions of the object of war. What is important for communication strategists is to understand how
a commander views it. Information strategy supports or is supported by kinetic activity. But while its tools—including television, radio, print, or social media—may be employed as weapons and provide the trigger for destruction, most information warfare does not, per se, cause physical destruction. There is a theoretical bog here that theorists revel in. Avoid it. You do not need to go there to devise effective communication strategy.

Internationally respected political consultant Ronald A. Faucheux offers a practical view of communication strategy that applies squarely to how you develop one. It is, he says, “how you position yourself and allocate resources to maximize your strengths and minimize your weaknesses in achieving goals. It is a concept. It is a way to win.”

In short, a strategy describes concisely how you will achieve your strategic goals. In the end, your strategy is your roadmap to winning.

What Are Operations and Tactics?

Discussions on military tactics can become complicated. Let us keep the analysis to plain speaking. An operation is “a sequence of tactical actions with a common purpose or unifying theme.” T. E. Lawrence’s classic definition of tactics remains valid. While strategy sets goals, allocates resources, and defines a timeline, operations develop campaigns that tie a series of battles together to achieve strategic goals. Tactics are “the means towards a strategic end, the particular steps of its staircase.” They are specific actions taken to implement a strategy. Tactics are the battles: the techniques, procedures, and actions for fighting.

One may forge strategy at the tactical level. The Second Battle of Fallujah illustrates that well. It was a local conflict taking place within a large national theater of war. That is distinct from grand strategy, which views the achievement of strategic objectives—success or winning—from a broader perspective. In Iraq, the grand strategy required a clear plan of how all the elements—all operations—are integrated to support a strategy that achieves national policy aims.

Information warfare takes place at all three levels: strategic, operational, and tactical. The role of media cuts across all of them. What happens tactically may be broadcast across different operational theaters internationally. Events in Fallujah affected how Iraqis nationally felt toward Coalition efforts and the conflict; they affected international opinion. The kinetics may have a local effect, but those same actions, especially in what Rupert Smith terms war among the people—conflicts that entwine combatants and civilians—will gain wider coverage and the effects will extend beyond the tactical level.

Forging effective communication strategy requires thinking through effects in all three dimensions, not merely at the tactical or operational level. Today’s battlespace exists in living rooms around the world. How events are portrayed in traditional and social media, opinion in a wider operational area, and international opinion, can affect the outcome of a battle. The first battle for Fallujah in April 2004 offers a classic illustration, as explicated further in chapter two.

Endnotes

1. Charles E. Kirkpatrick, An Unknown Future and a Doubtful Present: Writing the Victory Plan of 1941, CMH Pub 93-10 (Washington, DC: U.S. Army Center of Military History, 1992). This work explains how then-Army major Albert C. Wedemeyer gathered the information to frame problems, propose a strategy, and devise concepts of operations across multiple theaters to defeat Germany. Ironically, Wedemeyer made no apology for his pro-German perspectives, for which Gen George Marshall shielded him from criticism.
2. Cols Qiao Liang and Wang Xiangsui insightfully argue that the 1991 Gulf War—Operation Desert Storm—amassed an international Coalition that came together for very distinct goals. They note that warfare agendas in prior eras exhibited greater clarity between overt and covert goals. Qiao Liang and Wang Xiangsui, *Unrestricted Warfare* (Beijing, China: PLA Literature and Arts Publishing House, 1999), 27–28. Note that the diversity of players who can affect the outcome of a modern conflict is far greater and their influence may be manifested in complex combinations of dimensions to affect the outcomes.


12. This point is among the lessons learned in the SIGAR report *Stabilization: Lessons from the U.S. Experience in Afghanistan*. SIGAR’s report is a blistering indictment of failed U.S. and Government of the Islamic Republic of Afghanistan (GIRoA) efforts.


14. See Gen Albert C. Wedemeyer, *Wedemeyer Reports!* (New York: Henry Holt, 1958), in which he describes how he accomplished the task. Wedemeyer had a key advantage: aside from graduating from the U.S. Military Academy at West Point, he spent time at the German war college Kriegsakademie in Berlin between 1936 and 1938, gaining crucial insights into German military strategic thinking. See also John J. McLaughlin, *General Albert C. Wedemeyer: America’s Unsung Strategist in World War II* (Philadelphia, PA: Case-mate, 2012); and Kirkpatrick, *An Unknown Future and a Doubtful Present*. Ironically, like many U.S. military officers, including Army Chief of Staff George C. Marshall, Wedemeyer was an isolationist who not only opposed U.S. entry into World War II but was unapologetically pro-German and anti-Semitic. See Olson, *Those Angry Days*, 100, 363, 414. Still, Olson credits Wedemeyer for his brilliant and “stunningly prescient analysis that ended up serving as the basic blueprint for U.S. military planning.” Olson, *Those Angry Days*, 415. It bears noting that Gen Marshall protected isolationists, including Gen Stanley D. Embick, who opposed aid to Britain and U.S. participation in the war prior to Pearl Harbor and made him the Army’s most influential strategist. Olson, *Those Angry Days*, 447. Army Col Truman Smith, a personal advisor to Marshall who had served as the U.S. military attaché to Berlin, opposed war with Germany and disliked Roosevelt to the end. Initial supporters of America were First policies included future presidents John F. Kennedy and Gerald R. Ford, future Supreme Court justice Potter Stewart, and many others who changed their views once war commenced.

15. See, for example, Mark Moyar, *A Question of Command: Counterinsurgency from the Civil War to Iraq* (New Haven, CT: Yale University Press, 2009), 249.


18. Jack Guy interview.


22. The often-quoted language, which is not dissected in this book about information strategy, examines war in the context of an international environment in which struggle predominates. Clausewitz states that war changes like a chameleon depending on the circumstances, but consists of a “wonderful trinity, composed of the original violence of its elements, hatred and animosity, which may be looked upon as blind instinct; of the play of probabilities and chance, which make it a free activity of the soul; and of the
subordinate nature of a political instrument, by which it belongs purely to reason.” Clausewitz, *On War*, loc. 644 of 4382, Kindle.


28. Betz, *Carnage and Connectivity*, 76. Clausewitz acknowledges that war is an instrument of policy, but his theme is the destruction of the enemy. If an enemy is destroyed, there is not much room for political maneuver. Military strategy must serve defined political ends, not the other way around, although in practice, political dithering in Washington results in de facto delegation to the military of policy making by default, which is not necessarily the most prudent approach, no matter how capable our commanders. That happened in Iraq and Afghanistan.

29. See Smith, *The Utility of Force*, 59–61. Clausewitz, *On War*, loc. 467 of 4382, Kindle: “[T]he political object, as the original motive of the war, will be the standard for determining both the aim of the military force and also the amount of effort to be made.”


34. Ling and Xiangsui, *Unrestricted Warfare*, 141–44.

35. Smith, *The Utility of Force*, 189. They emphasize especially the importance of moving beyond military operations to achieve military objectives may prove more powerful. Smith, *The Utility of Force*, 144.


37. Smith, *The Utility of Force*, 377. Smith astutely observes that future wars will likely fall into this category, spurred by media coverage.


39. See, for example, Farwell, *Persuasion and Power*. In Rwanda, radio was used effectively as a weapon, directly triggering murder. The Taliban in Afghanistan and al-Qaeda in Iraq used it indirectly to inspire violence.


