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From Intelligence to Influence: The Role of Information Operations

Lieutenant-Colonel Roger Vandomme

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This research study is dedicated to the memory of
Lieutenant Hugh McKenzie, VC
Princess Patricia's Canadian Light Infantry,
Killed in combat
in Passchendaele, on October 30, 1917



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Preface

The reality of contemporary asymmetric conflicts forces an acknowledgement of a military power's inability to gain a political victory for itself alone. We find an issue worse than defeat: non-victory, faced with an adversary who rejects the war we want to impose on him. Confronted with this situation, complex and destabilizing for most militaries, and faced with the evidence that the solution is in a dimension other than that of armed conflict, we are seeing a renewed interest in what are called Information Operations (IO). However, a plunge into the IO universe reveals an often unknown world, sometimes unstructured and in constant evolution.

As early as the 1990s, the idea of an IO asset started to germinate within the Canadian Forces. The aftermath of 9-11 and our engagement in Afghanistan led to the development of a structure which, although it remains fragile and imperfect, is positioned as one of the best within the FIAS. What really is Canada's place in this context and especially, what is its future? To answer these questions, let us first examine three contexts: historical, geographical, and commercial.

An historical context reminds us that "ruses, stratagems, deceptions, camouflages and artifices are as old as war itself."¹ From the Trojan Horse to "Desert Storm", strategists have used information to their advantage, in various ways. Or at least they have tried. It is often from a difference in power relationships that the need for IOs emerges. Hence, they are often linked to revolutionary war, insurrections, and terrorism. In the 19th century, with Gallieni and Lyautey, the colonial adventure of the French Empire produced forerunners of the principles of pacification and application of the "oil spot" theory. The first world conflict saw an infatuation with pamphlets, and the use of contemporary techniques such as photography. The Second World War saw a brutal revolution with perfect use of propaganda, through its undisputed master, Joseph Goebbels; and deception knew its own hours of glory with Operation FORTITUDE. The Cold War and Vietnam showed an uneven evolution characterizing love-hate relationships between command and IOs. Decolonization saw the emergence of a new generation of theorists with Lacheroy, Hogard, Némó, Trinquier, and Galula. Contemporary conflicts, due to their asymmetric aspect, force us to revise our assumptions on waging war and to "rethink" the enlisting and perception of populations.

A geographical context allows us to differentiate and define three separate groups: (1) the United States and countries who copy their doctrine almost word for word; (2) countries from the former Eastern Bloc who seem suspicious of the propaganda and concentrate their effort upon the material aspect (electronic, cybernetic and

¹Paul Villatoux. *La guerre psychologique des origines à nos jours* (Paris: L'esprit du livre, 2008). (Free translation.)

network warfare); and (3) countries that try an original approach. Definitions are generally incoherent, even conflicting. However, one encounters an often fruitless will to understand the workings and the articulation of IOs with Psychological Operations, Deception Operations, Security Operations, Electronic Warfare, and Computer Network Operations. In spite of the still obvious difficulties in understanding and adaptation, it nonetheless clearly appears that the tendency is towards integration, coordination and synchronization of IOs with other military or non-military functions. The differences observed in the older documents tend to be smoothed out nowadays as actors are increasingly in agreement with the roles and definitions, even if there is still much to do. Major confusion about the definition of IOs' role still exists: Is it a functions coordination forum, an actor in its own right, or a capabilities manager with a view to achieving specific strategic objectives? Finally, a commercial context proposes an interesting parallel between the military world and the "business" world. Communication strategies and strategies of influence have found their place among *marketing* departments. Charged with leading the consumer to make a purchase, or more strategically to manage the reputation of the brand, advertisers and corporate communicators use all the weapons of psychological war. Methods such as change management can also be studied and applied with profit. We must also note with much interest the advent of strategies of influence that aim at using "shifts of opinion" to build the company's identity. Finally, the proliferation of social networks is the result of a technological evolution, which, although it is not the objective, constitutes a parameter not to be ignored.

At the end of these three contexts, conclusions are obvious:

- The population is central to IOs. The population lives in cities, which are the Information War theatre.
- For the information attack, we have to go back to the ideology and the cause. Understanding this cause requires open-mindedness on our part. "Can one really oppose the Jihad's spiritual offensive with material arguments?"²
- As far as our adversary is concerned, we run three major risks. The first is simply to consider him a negligible quantity in the analysis. The second is to construe him as another self and hence to apply to him our own modes of reasoning and way of doing things. The third is contempt, which is quickly

²Philippe de Montanon. David Galula's presentation, *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008). (Free translation.)

produced by the acknowledgement that he does not have the same elements of power we do, which actually gives him his strength.³

- Today's soldier, and even more so tomorrow's, must present an evolving and changing profile, and adopt a culture which will allow him to shift, in a very short period, from a classic military posture to a social engineering function.
- Perception, opinion and influence are inseparable from modern warfare. The targets are the adversary's will, perceptions and understanding.
- The principles of information operations are not yet clear enough in people's minds.
- Finally, it appears urgent to reach a consensus on the definitions, structure and status of IOs, particularly within the framework of change management, which rests on a feeling of urgency and which requires a clear strategic line.

The question that is often asked is: "Can non-kinetic IO solutions become a core capability?" The answer is undeniably "yes". However, we know that values and beliefs drive behaviours, which themselves define culture. This means that a cultural shift is required to transform IO into a core competency. This will happen only as fast as behaviour changes. Leadership can measure shifts in organizational behaviours. How leaders take ownership of such change, display goodwill, articulate a shared vision, and make decisions will be the indicator of progress in the right direction.⁴

Canada has the opportunity to take pride in being one of the first countries to have understood and embraced in a timely fashion the changes brought about by contemporary conflicts. As such, it is in a position to develop, on a foundation of universally recognized values, an expertise that is as original as it is relevant, offering innovative perspectives to address new challenges.

To turn down or to reject this option would have catastrophic consequences. We could very well be tempted, for example, to use the announced withdrawal from Afghanistan in 2011 as an excuse to cut budgets and postpone IO development to a later date, or worse, never. This mistake would put us in the position of nations which, in the past, had acquired this capability at the cost of many sacrifices and which, having not maintained it, are today forced to "reinvent the wheel".

It is therefore imperative to allocate the required budgets and to take decisions that will demonstrate the seriousness of the directional change at work. Specialization must become a full weapon, to attract talents and offer career opportunities. Finally, it would be appropriate to develop a strong doctrine that would allow the optimum use of the assets offered by IOs' wide array of actions.

³General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007). (Free translation.)

⁴David C. Akerson. "Information Operations as a Core Competency", *IO Sphere* (2009).

The tactical base is convinced and ready. This is especially true of those who daily acknowledge in Afghanistan the limitations of conventional engagement. Operational command is convinced and ready to think differently. It is now up to strategic command to take decisions that will show, in fact, the will to exercise the cultural shift needed, which will allow Canada to make a definitive step towards understanding and resolving tomorrow's conflicts.

Introduction

*From observation to intoxication, from intelligence to electronic data processing, from secret services to decoys, from Ulysses's ruse to orbital filming satellites, the quest for knowledge monopoly is endless. It becomes the art of self-informing and of disinforming: reducing the uncertainty of what is real and plunging the adversary into the fog of war.*⁵

A quick search on the topic of Information Operations (IO) inevitably leads to a myriad of research studies, summaries, theses and other works, offering diverse and varied approaches. All these publications define more or less clearly the current doctrines and their history, as well as the positive and negative aspects of experience feedbacks in the field of Information Operations. However, everyone seems to forget an element that is nevertheless crucial.

Over the last ten years, most of these publications have failed to meet the striking need, both within the Canadian Forces and the Department of National Defence, for a true engagement on the part of command to start a sustained and meaningful dialogue with a view to the creation of a combined and allied (or even joint) Information Operations capability within the Canadian Forces.

There is nonetheless a consensus, among non-kinetic operators within the Canadian Forces, on the urgency of this engagement. Indeed, "never has the contrast been so great between the efficiency of military power and the inability to transform it into a political asset."⁶ Today, in the age of hyper-information, we find there is a position almost worse than defeat: non-victory. The notion of power seems to detach itself from that of the State, by becoming other than a capability to be imposed; it is also a capability to influence, to elude others' will, even to reduce, through nuisance, their means of expression. Being powerful is being always able to coerce, but the means of coercion have diversified and have become easily accessible to the new actors in the political arena. We know it is no longer necessary to be a state to defeat a state.⁷ "Do the paths on which we trod yesterday, and on which we are basically still treading today, truly satisfy our needs? The answer is probably "no," and it is not illogical. Our vision of the world and of war has given rise to a military tool and courses of action that were adapted for their time but, due to the circumvention law which is the first law of war, it also led the potential adversary to change his nature and to find countermeasures, and new forms of resistance to the new weapons we had invented. Not many adversaries are willing to fall victim to the kind of war that we control, that we prefer to wage, and for which we often continue to prepare."⁸

This research study intends to initiate an in-depth reflection as soon as possible and to spark off a necessary engagement from our leaders.

⁵François-Bernard Huygue. "Croire contre," *Croyances en guerre—Les Cahiers de Médiologie*, No. 8 (1999). (Free translation.)

⁶Arnaud de la Grange and Jean-Marc Balencie. *Les guerres bâtardes* (Paris: Tempus, 2008). (Free translation.)

⁷General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

⁸*Ibid.* (Free translation.)

Meeting the need to create an Information Operations capability in Canada does not necessarily mean adopting the US doctrine as we were likely to do in the past. Neither does it mean starting to build heavy operational structures without providing them with long-lasting support. However, this could eventually lead to the creation of centres of excellence, and the education of leaders who, by their ability and their will, will force reflection on Information Operations to a point where a more robust operational capability can and must be implemented. “Today, the predominance of the technical and the quantitative has replaced that of the qualitative and the psychological. The logic of ‘stocks of power’ has yielded to that of the ‘flow of influence’.”⁹

One of the best descriptions of the problems encountered today during the deployment of information operations can undoubtedly be found in an article written by Second Lieutenant Jessica M. Davis.¹⁰ Second Lieutenant Davis provides specific examples of the use of IOs in Kosovo and in Afghanistan. Her article shows clearly that “Canada has not really stepped into the information battlespace. In fact, Canada’s continued refusal to devote the necessary resources and develop the necessary capabilities is severely hampering its effective use of IO, and, indeed, the safety and effectiveness of Canadian soldiers deployed on the front lines.”

Some malcontents could question the judgement and writings of a “simple” second lieutenant and seek the opinion of an authoritative source. But the article by Second Lieutenant Jessica M. Davis has the advantage of being both candid and spontaneous. It is hoped that this message, shaped by field experience, will reach the ranks of decision-makers.

We hope that this research study generates and stimulates a true dialogue at the highest political and military levels, so that options can be proposed for the future development of Information Operations. It is indeed crucial that command be convinced of the need to use IOs, including other non-kinetic actors (CIMIC, PSYOPS, PA), to maximize the execution of missions and to strengthen national support.

Unfortunately, field commanders often deem their non-kinetic operators inefficient — perhaps because they are not themselves trained to use them due to the lack of doctrine detailing the concerted use of IOs, or because of the lack of personnel training due to command’s lack of confidence — a vicious cycle. One still notes today an overlap of the areas of IO application into those of CIMIC, PSYOPS, and even intelligence. So, who leads? Who takes decisions? Who gives orders? Are IOs the “umbrella” or the “cap” that governs all non-kinetic actors, or are they simply one actor amongst others? The question then becomes: “Do commanders in the field know what each element brings to the realization of their mission, and how to use them?” Unfortunately, and not surprisingly, the answer is “no”. Certainly not in Canada, nor its southern neighbour.

From theatre commanders’ point of view, the non-kinetic actors make assessments, designate objectives or audiences, and measure effects. They all contribute to disseminating “good news” regarding stabiliza-

⁹General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007). (Free translation.)

¹⁰Jessica Davis. “From Kosovo to Afghanistan: Canada and Information Operations,” *Canadian Military Journal*, July 2008.

tion and reconstruction. CIMIC and PSYOPS, however, generate considerable value-added intelligence, cultural information, and demography of the land. “The moral insistence on the savagery of war makes us forget how much it requires the intelligent use of data. There are factual or tactical data, which preside over the action of protagonists, and ideological and moral data which dictate the assessment we make of those protagonists. Some apply mostly to things, others to people.”¹¹ All these aspects are notably ignored in doctrines and lead to fratricidal confusion between operators. “Furthermore, no operation can be strictly military or political, because the psychological effects of operations always influence, be it positively or negatively, the whole of the situation.”¹²

This research study will also try to clearly identify what concept is behind the label “Information Operations”. Amidst the international IO community it is generally accepted that the concept comprises five major actors: electronic warfare, network operations, psychological operations, deception, and operational security. Some nations also include media operations and Public Affairs, as well as Chaplaincy.

Often the term “information operation” is used as a synonym for information warfare. Information warfare, a technique that is different from waging war, does not exist doctrinally speaking, although this would resolve much confusion. There are several different forms of information warfare in place, each one claiming to play the lead role. Seven identified forms of information warfare, that include the protection, handling, alteration, and denial of information, are:

- Command and Control Warfare: frontal engagement of the enemy;
- Intelligence Warfare: design, protection and denial of the intelligence and knowledge gathering and interpretation system, in order to dominate the battlefield;
- Electronic Warfare: radio, electronic and cryptographic techniques;
- Psychological Warfare: in which information is used to modify the state of mind of friends, neutrals and adversaries;
- Network Warfare: in which computer networks are targets;
- Economic Warfare: blockage and direction of information to obtain economic dominance; and
- Cybernetic Warfare: a hodgepodge of futuristic scenarios.

The common factor in all of these forms of engagement is that there is no synchronization of fire between physical and psychological spaces to get a symmetric response to an asymmetric threat. Nor is there any real integration among non-kinetic actors (IO, CIMIC, PSYOPS), nor any real solution in sight. “Modern, revolutionary, subversive, insurrectionary, and asymmetric warfare are many expressions

¹¹François-Bernard Huygue. “Croire contre,” *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999). (Free translation.)

¹²David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008). (Free translation.)

which, with the increase in qualifiers accumulated over time, suggest the same disarray in military thinking in view of a phenomenon that is as serious as it is recurring, as natural as it is disturbing, and which sports the name 'deregulation'. Because modernity is none other than war deregulation."¹³

Today, the question is not knowing who does the best work, but rather bringing forth the evidence that IOs work. Or even, if IOs are everything, whether they are perhaps, in fact, nothing. This means that if so many activities fall under the IO label (ten or twelve in the Canadian Army), perhaps it is because IOs are simply a wide intellectual concept, just like the "war of movement". Perhaps for Canada, IOs are only a concept, a function of coordination, or a state of mind. "Traditionally, the army is loath to use modern war processes that it does not know well, and apart from that, the violence of the attacks it was subjected to in some intellectual environments and the scarcity of support it received from the government certainly did not prompt it to pursue operations for which, besides, it is ill-prepared."¹⁴

Is it possible, then, that this concept may be, after all, only the latest fashionable novelty? The latest buzzword from the minds of some visionary theorists, so esoteric and complex that no one can understand it, far less implement it? Should we be wary of our natural tendency to fall in love with our own theories?

Is the current IO concept definitive, or are we seeing new concepts emerge, such as joint information operations or strategic communication? Could it be that Canada, busy modeling its IO concept on its southern neighbour's, cannot see that the latter is already evolving towards a new "strategic communications" concept? If that is the case, is it wise to allocate already scarce resources to a concept that is headed for obsolescence? Or is it just a label game?

Command has to make a crucial choice in full knowledge of issues and consequences. We hope that this research study will help to some degree in lifting the fog over information.

"In strategy it is important to see distant things as if they were close, and to take a distanced view of close things."

Miyamoto Musashi, *No Kami Fujiwara No Genshin*, 1645.

The reality of probable war has progressively brought us back to a better perception of the true role of war, which is firstly a role of communication: communication to an opposing power, to a population we want to control, or sometimes — for reasons of internal politics — to our own public opinion. Psychological domination is to probable war what dominating land movements have long been to yesterday's war. This role reversal in war and communication is even more obvious than the destruction itself, which is proving less and less politically effective. The political success of communicating through war most often seems incongruous with the traditional idea of a great military victory. It can sometimes be

¹³Roger Trinquier. *La Guerre moderne* (Paris: La Table ronde, 1961). (Free translation.)

¹⁴*Ibid.*

preferable not to counter-attack, but to let the adversary escape, so as not to escalate violence or destruction, even to preserve the existence of an indispensable partner in tomorrow's dialogue!

It can be said, in a way, that the shift in paradigm from industrial war to war in populated areas has led to a fundamental role transformation: yesterday's communications were "on" war, henceforth, communications are "through" war. Military actions are truly "a way of talking"; from now on, any major operation is first a communication operation, whose acts, even minor, all speak louder than words. Faced with a probable adversary who knows how to use the power granted by new communication techniques, using the full force of images (organized massacre stagings, torture, hostage executions, etc.), and seeking to exploit through the media the reactions of the force he himself will have provoked, our essential manoeuvre becomes communication.

Today, waging war is first and foremost managing perceptions, those of the entire collective of actors, near or far, direct or indirect. Thus, we must define the message we wish to transmit, and devise actions enabling us to communicate it to the "global village", which is as likely to be Fallujah or Kandahar as Moscow, Dallas, Liverpool or Paris. This means that war, far from being waged for its own sake, must be considered as a means of communication to be included within a global communication strategy comprising many other vehicles. Moreover, violent use of weapons often proves the most important in the initial stages; in fact, on the one hand, it is the most audible and, on the other hand, the initial din of the weapons is frequently indispensable in imposing "strategic silence" within which the other vehicles of communication can be heard.

This pre-eminence of communication also means that modern armies must be created in this spirit and equipped with technical means of delivering a "good" message — whence the role of armament precision, for example — and to participate for the duration, this time with means dedicated to this communication manoeuvre. In effect, they are condemned to remain in the field, long after heavy weapons quiet down. Because actions speak louder than words, the message and the way it is delivered are fundamental to the realization of the political effect. Henceforth, as an individual action can speak as loudly, as quickly, and as far as the strategic plan, and is impossible to control down to the lowest levels, it will be necessary to properly impose the general intention, while leaving it up to each one to adapt the message to his own circumstances. Probable war is no longer about defeating; it is much less constrained, it is about convincing. Again, this forces us to think differently.

General Vincent Desportes. *La Guerre probable* (Paris: Economica, 2007).

1. Definitions

First, it is desirable to highlight some inconsistencies that could be confusing. Indeed, we hear *ad nauseam*, and we read too often, the terms ‘Information Operations’, ‘Psychological Operations’, ‘Influence Operations’, ‘Information Campaigns’, ‘Deception’, or even ‘Diversion’, without really being certain of consistency among the discussants on the exact meaning given these expressions.

We are in the area of communication, and thus of information transfer, from the angle of images or words leading to perceptions that will generate action. We often see confusion between information and communication. Information is content; it is a piece of knowledge. Communication is action — the action of transmitting data or information. So, a reflection on communication will be centred on the use of vectors. A reflection on information should be centred on contents. Information understood in the sense of action, the action of informing, is then understood as the action of conveying information, as opposed to simply passing on data.

In the beginning there are “data”: raw data in the form of numbers, words, images or sounds, even objects or odours; in short, that which is perceptible by our five senses. These data create in us a perception that becomes “information” once it is put into context. For data to become information, it needs context, a rating scale or a field of application. This information is then checked against our knowledge of the world around us, compared with our value scales and our judgement, and then becomes “knowledge”. Detailed research of origins and mechanisms leads us to “understanding”. The absorption of this understanding and its integration into our own decision models will ideally lead to “wisdom”.

The aim of this evolution from “data” to “wisdom” is to establish a framework for what we will be called to do every instant of our lives, ie, make decisions. Within the critical frame of a conflict, decisions are numerous, permanent, and made at multiple levels. Victory will result from our making the right decision and the adversary’s making the wrong one. Ensuring we make the right decision proceeds from planning and its wide array of information and analyses. But how do we make sure the adversary will make the wrong decision? “Simply” by changing data, altering perception, or modifying understanding. But to this end, we ourselves need to have a flawless understanding of the mechanisms and the many factors they produce. This would require a flawless and coherent knowledge of the idea carried by the words, hence through a precise definition of the terms.

1.1. Information Superiority

This is the operational advantage gained through the capability to gather, process and disseminate an uninterrupted flow of information, while exploiting this same capability or denying it to the adversary.

1.2. Information Operations

As the ultimate responsibility of the Department of Defence and acting on all three levels of planning — strategic, operational and tactical — Information Operations are most often understood as the integrated use of five major components: Electronic Warfare, Computer Network Operations, Psychological Operations, Deception, and Operations Security.

This is the definition we will retain for the remainder of this study, even if debate is ongoing surrounding the understanding of IOs as a coordination function or as a major capability in itself. We will return to it in detail in the following chapters.

1.3. Deception

As a recognized component of IOs, deception is understood as actions that are deliberately executed with the aim of deceiving the adversary in his assessment of friendly capabilities, intentions and actions, thus leading him to make decisions conflicting with his interests and contributing to the success of the friendly mission.

We now get to the heart of a problem in translation, unavoidable in an international context. The English term 'deception' is unequivocal, and corresponds in all points to the above definition. However, the French use of '*déception*' is confusing because it is most often understood in the sense of a disappointment or disillusion. The etymological root (from the Latin *deceptio*) is, however, clear in the sense of duplicity and deceit, and that is exactly what is involved – deceiving the adversary.

1.4. Psychological Operations

Accepted components of IO, Psychological Operations are planned with the aim of communicating indicators and selected information to foreign audiences in order to influence their emotions, motivations, and objectives, and thus ultimately the behaviour of governments, organizations, groups and individuals (US definition). The goal of Psychological Operations is to convince or strengthen foreign attitudes in a direction favourable to friendly objectives.

This is our first encounter with the consequences of history and with its compromises. As we will see in the following chapters, the history of Psychological Operations is strewn with 'failures'. It must be said that the field is sensitive and that obstacles abound. Some nations such as France, because of the still painful wounds of the Algerian War, hate the term "Psychological Operations" and have replaced it with "Military Influence Operations". This is unfortunate and dangerous. The terms have their own meaning that can withstand neither fusion nor transposition, or risk creating catastrophic misunderstandings.

Psychological Operations, clearly, are generally meant for the adversary, sometimes for neutrals. They are often natural tactics of nature and seek effects normally limited in time.

1.5. Perception Management — Influence

Influence is often associated with Psychological Operations. This term describes actions conducted to communicate or deny indicators or precise information to foreign audiences, in order to influence their emotions, motives, and objectives, as well as information systems and authorities, with the aim of influencing their assessments and decisions in a direction favourable to friendly objectives.

This definition, borrowed from NATO manuals, highlights another compromise — no longer a historical one, but a politically correct one. Indeed, we are made to believe that Influence Operations are intended solely for the adversary because it is not "right" to influence our fellow countrymen. Yet we know that conflicts depend on budgets, voted by a Senate, itself influenced by a people. If the latter is not correctly informed about the objectives of the conflict, others will take charge of it. There is an ongoing misunderstanding to the effect that influence is necessarily negative. On the contrary, influence is most often positive, presents true information, and seeks long-term effects. We will see in subsequent chapters how marketing and advertising are less scrupulous.

“Influence is too often equated with propaganda or disinformation, terms that were used freely in the past. This definition is both restrictive and negative. Disinformation — in the sense given it by the Soviets, who are experts in the field — consisted in delivering imprecise information that nonetheless contained elements of analysis that were true. The listener was led to embark on a course that was counter to logic but along which he was compelled. Influence, on the other hand, consists in leading the audience to leave its thinking pattern and embrace another. This change is produced by elements that one presents to him and which lead him to think. In sum, in a certain way, the more intelligent one is, the more easily influenced he is. This is because influence calls for the analytical capability of the listener, who must sort out what he “normally” thinks from the new elements presented to him, and the validity of which it is up to him to measure. Any solid argument proposed to him can thus lead him to review his judgement, and therefore his position. It is from here that the process of influence is set in motion.”¹⁵

1.6. Propaganda

Propaganda is an array of psychological actions, executed by an institution or organization, that determine public perception of events, people or issues, so as to indoctrinate or recruit a population and to make it act in a certain way.

In war time or during an insurgency period, a recruiting system can be set up in the form of “restlessness propaganda”, which seeks, above all, to provoke action. More vaguely, but no less urgently, propaganda can also seek to have the individual and the masses adhere to a set of ideas and values, to mobilize them, in short to integrate them into a given society. In this case, we refer to “sociological propaganda” or even “integration” as opposed to “agitation”, according to the framework that Jacques Ellul proposes.¹⁶

Here again, we are facing ghosts from the past. The mention of the word “propaganda” recalls totalitarian regimes, and Joseph Goebbels’ spectre immediately comes to mind, leading to a rejection of the term. The primary meaning, however, is none other than the propagation of ideas, in the same sense the term “dissemination” is used today. All the same, in the commonly recognized sense, this dissemination of ideas aims mainly at having masses adhere to a set of values.

1.7. Operations Security

As a recognized IO component, Operations Security is understood as the process of identifying critical information, and analysing the operations, of friendly forces with a view to:

- identifying those actions observable by enemy information systems;
- determining indicators that these enemy systems could obtain and interpret to draw useful conclusions; and
- selecting and executing measures aimed at eliminating, or reducing to an acceptable level, the vulnerability of friendly operations.

¹⁵Alain Juillet. Chief Economic Intelligence Officer for France’s Premier, in an interview given to *Communication and Influence*, special issue, June 2009. http://www.comes-communication.com/newsletter_collection.php.

¹⁶Jacques Ellul. *Propagandes* (Paris: A. Colin, 1962, Paris: Economica, 1990). (Free translation.)

1.8. Electronic Warfare

As a recognized IO component, Electronic Warfare is a set of military actions using electromagnetic energy to determine, exploit, reduce or prevent hostile use of the electromagnetic spectrum, while allowing its use by friendly forces.

1.9. Computer Network Operations

As recognized IO components, Computer Network Operations are meant to attack, corrupt, disrupt, deny, exploit and defend electronic infrastructure and information. They include Computer Network Attacks, Computer Network Defence, and Computer Network Exploitation.

1.10. Computer Network Attacks

Computer Network Attacks are actions conducted through computer networks and through the use of software, programs, and data flow, to disrupt, deny, corrupt or destroy the information contained in a computer or network, even the computer or the network itself. This is not to be confused with an electronic attack which, if it could also be waged against a computer, would use the electromagnetic spectrum.

1.11. Computer Network Defence

Computer Network Defence is a set of actions conducted via computer networks to protect, monitor, analyse, detect and respond to attacks waged against Defence information systems and computer networks.

1.12. Computer Network Exploitation

Computer Network Exploitation is the gathering of intelligence conducted through computer networks, to gather data and information contained in an automated computer network.

A set of related activities revolves around IOs:

1.13. Civil-Military Operations

Civil Military Cooperation (CIMIC) or Civil-Military Operations (CMO) pool command actions to establish, sustain, influence, or exploit relationships between a) armed forces, organizations, and civil authorities (governmental or non-governmental); and b) friendly, neutral or enemy civil populations in theatres of operations, with the goal of facilitating military operations and consolidating, even achieving, strategic objectives. The definition can include activities that are normally the responsibility of local, regional or national levels of government. These activities can be conducted before, during or after an armed conflict or other military operations. Civil-Military Cooperation is seen as an activity independent of, yet linked to, IOs.

1.14. Diplomacy

At the strategic level and under the Ministry of Foreign Affairs, or State Department, the role of Diplomacy is to interact with, inform, and influence foreign audiences. In addition to press briefings and other traditional forums, public diplomacy includes less traditional means such as intermilitary

programmes, summits, and cultural exchanges. Most actions executed outside national territory fall under the responsibility of diplomacy.

Military action being the extension of political will, if we must define an ultimate level of responsibility, decision and execution, it certainly is diplomacy. Moreover, declarations of war are issued not by the military but by diplomats.

1.15. Public Affairs

Conversely, the responsibility of Public Affairs is to interact with the national population and to keep it informed. The definition within the military framework is more precise and speaks of “public information and community actions directed at the internal and external public, in the interest of the Ministry of Defence”, as well as the maximum transmission of information on Canadian Forces (CF) to the Canadian public, to maintain the transparency required for a democratic regime, limited only by operational security considerations. Public opinion being only one part of the equation, actions by Public Affairs remain limited. The concept is wide and general. Not government-specific, it is also — and often — used by companies.

1.16. Public Information

This refers to information of a military nature, the propagation of which, through public media, is not incompatible with security, and the publication of which can be considered desirable.

1.17. Combat Imaging

In support of IOs, it is the acquisition and use of still or animated images. Its aim is to provide a complement to data and visual information in the decision-making and planning processes.

1.18. Counter-Intelligence

In support of IOs, counter-intelligence is the gathering of intelligence and the activities conducted to protect against acts of espionage, sabotage, or terrorism led by, or in the name of, foreign governments or organizations.

1.19. Physical Attacks

In support of IOs, Physical Attacks disrupt, damage, or destroy enemy targets through the application of brute force. Physical Attacks can also serve to create or alter the adversary’s perception.

1.20. Physical Security

In support of IOs, Physical Security is the group of measures used to ensure the protection of personnel and equipment, to prevent access to the facilities, materials, and documents, and to protect them against acts of espionage, sabotage, destruction, and theft.

Important!

In the following chapters we will analyse the contents, not the container.

The sections on electronic warfare and computer networks operations are well known and without great ambiguities. IOs need vehicles. These are physical and often electronic. They need to be protected. The adversary's need to be destroyed. Nothing ambiguous there.

We will focus mostly on the aspect of contents: ideas, words, images, and the meaning they are given; the interpretation that derives from them; and actions they lead to.

2. The Canadian Experience

In a very subtle way, Canadian doctrine is putting Information Operations back in a political context. IO's strategic goal is "to secure peacetime national security objectives, deter conflict, protect the Department of National Defence (DND) and Canadian Forces (CF) information and information systems, and to shape the information environment. If deterrence fails, IO (Information Operations) seeks to achieve Canadian information superiority to attain its objectives against potential adversaries in times of crisis and/or conflict. IO seeks to persuade decision-makers at all levels to accept, peacefully or with the least amount of resistance, an outcome beneficial to Canadian interests through the use of information. IO can be used to influence decision-makers at all levels, from heads of state through troops in contact on the front lines to the general populace on both sides of a dispute. Information is the means; decision-makers are the objective."¹⁷

In this context, described as the information–decision continuum, Information Operations are defined as "actions taken in support of political and military objectives with the aim of influencing decision-makers by affecting and exploiting information while protecting one's own information."¹⁸

As everywhere else, Canadian IOs pool a set of disciplines. The originality resides in the difference between offensive and defensive IOs. Offensive Information Operations include Psychological Operations (PSYOPS), Deception (OPDEC), Electronic Warfare (EW), Intelligence, Computer Network Attack (CNA), Destruction, and Special Information Operations (SIO). Defensive Information Operations comprise Information Security (INFOSEC), Material Security, Operations Security (SECOP), Counter-Deception, Counter-Psychological Operations, Counter-Intelligence, Electronic Warfare (EW), and Special Information Operations (SIO).

The referenced document is B-GG-005-004/AF-010, published April 15, 1998. Now old, it must be renewed under the influence of CFJP 1.0 and more recent doctrines. However, this document has the advantage of painting a clear picture of both the objectives pursued and what the organization and the use of IOs should be. Using the strength of the conditional tense, the document is a long list of desirable instructions.

Today, opinions vary regarding the evolution observed over the last ten years. Some will say progress was made and that is what is most important. Others will be surprised that so little progress was made in ten years. We all recognize that these decisions are subject to constraints, and require compromises. It is essential that these compromises do not distract us from achieving military and political objectives set by our government, and that future choices are informed, that is to say, with full awareness of their consequences.

2.1. Brief Flashback

Before the 1990s, Canadian Information Operations and Psychological Operations capabilities were limited to a restricted volume of personnel, trained in Great-Britain or in the United States through two- or three-week courses, and sent in support of operations, mostly in Bosnia. When these personnel

¹⁷ *Canadian Forces Information Operations*, April 15, 1998, B-GG-005-004/AF-010.

¹⁸ *Ibid.*

returned, they were reintegrated into their units and disappeared from the IO scene.

In the 1990s, an IO capability was set up in support of operations in Haiti. Canadians of Haitian origin were recruited and sent for training to Fort Bragg in the United States. Various equipment, radios, loudspeakers, and printing material were acquired. Based on the US model, we created small teams called Military Information Support Teams or MISTs. These very flexible small teams were adapted to more permissive environments and were easier to sell to the command than heavy Psychological Operations teams. MISTs are integrated in the United Nations mission and do a remarkable job. At the end of the mission, the teams, back in Canada, were dismantled and the materiel was left to rust up in a Longue Pointe warehouse, in Québec.

By the mid-1990s, the CF started to ponder the realignment of capabilities through Operation NEW HORIZONS. This was meant to identify future threats as well as the capabilities required to face them. In the fall of 1999, the army tried to set up a CIMIC and PSYOPS capability. However, the Minister's Office was opposed to it because of the negative perception of PSYOPS. The study project on asymmetric threat started in January 2000, and the report was submitted on September 1st, 2001. September 11, 2001, was a sledgehammer argument for the Deputy Chief of the Defence Staff (DCDS), who asked the army to develop an IO capability as part of the Asymmetric Threats Study. Simultaneously, Canada also signed an agreement with NATO that set up operational objectives including developing IO capabilities as part of a battalion deployment.

The problem was that, caught in the whirlwind of its Land Force Restructure (LFR), the army did not have the means to create this capability. They would have had to sacrifice other capabilities, roughly to transform bayonets into PSYOPS. The solution was found in the Reserve, which was not under the same constraint. The restructured Army Reserve took on the project, opened a budget, and nominated people in charge of the development of IO capability. Between September 2002 and April 2003 this team invested in research, lectures, and conferences and in May 2003 proposed a development plan that was accepted and applied in the Québec sector.

On November 18, 2003, General Hillier, then Army Chief of Staff, signed the second restructuring phase (Order 1901-6-1 (CLS) LFRR II), which this time included the development of a PSYOPS capability in the Québec sector, ready to deploy in Afghanistan as early as 2005. The civil-military capability was under the responsibility of the Western sector.

In May 2004, the PSYOPS capability of the Quebec sector represented sixty-five people. In the summer of 2004, all these people were trained either in Great Britain (15 UK PSYOPS), or in the United States. During that summer of 2004, a British instructor came to Montréal to complete the training of forty people. The starting core element was then ready to work. In eighteen months with a budget of two million dollars, this team set up, from nothing, a capability ready to work with its training programme, documentation, organization, and even the beginning of a doctrine.

In 2006, Command ordered an extension of the PSYOPS capability. A Psychological Operations Director was nominated, and the capability was transferred under the responsibility of the Land Force Doctrine and Training System (LFDTS) in Kingston. Deployment could then be carried out in other sectors in the form of companies or platoons. However, since they did not belong to an independent formation,

personnel coming home from a theatre of operations returned to their units. It appears that they will rarely deploy a second time in the same specialization.

2.2. Course of Action

In the beginning, the formulation was copied on the allies'. The PSYOPS teams comprised three to five people, plus a security element, who traveled in a G-Wagon.

From 2005, a major transformation happened. The deployed teams were the size of a platoon (since fall 2009), of roughly thirty people, eighteen of whom were purely specialized PSYOPS. On February 4, 2010, the TFK PSYOPS platoon was forty-five people strong and was supported by three allied teams, for a total strength of fifty-seven. From 2008, this new organization also included an officer in charge of the coordination of means. Indeed, one realized that each theatre commandant had his own priorities that were not always in harmony with the use of IOs.

This organization, by its sheer volume and quality, was the envy of other nations that were still deploying small teams of three or four specialists. Today, Canada deploys the strongest and the most robust PSYOPS component. This major evolution was made possible thanks to the request, insistence, and support of field commandants, more than to the support of the High Command in Ottawa.

Indeed, faced with budgetary and resource management problems, decision-makers tend, naturally, to favour the known — guns and tanks — over a capability that still belonged to the unknown, even to the mysterious and bizarre.

Consequently, the capability was set up completely on operational funds through the Land Forces Capability Development Process. Handicapped by very inconsistent past experiences, even failures, the current development is due only to successes achieved and demonstrated in Afghanistan. With the withdrawal announced and foreseen for 2011, the question arises of the sustainment of this capability. If the only motivation for the sustainment of an IO capability within the Canadian Forces is Afghanistan, the withdrawal of troops in 2011 could unfortunately mean the demise of IOs.

2.3. Attempted Synthesis

Following the well-known model of the *SWOT Analysis*

Strengths

- A hard core of dedicated generals.
- A team of bright and motivated actors and operators.
- Open-mindedness and a willingness to differentiate.

Weaknesses

- The personnel engaged in IOs are insufficient in number and in training.
- IO Force preparation is too superficial.
- There is a lack of resources for, and effort and interest in, knowledge of the environment, the population, and the adversary.

- Each rotation sees the loss of knowledge, relationships, and networks previously constructed. Every six months, we have to start from zero.
- Progress is slow.

Opportunities

- Peacekeeping in Afghanistan.
- Development of a world-renowned national specialization.
- Development of a process to maintain and share knowledge.
- Formalization of the return of experience.
- Making IOs the operational core element.

Risks

- There is too much to do at the same time. Priorities must be established, at the risk of giving up initiatives.
- IOs are understood and managed at the same level as targeting, which corrupts their reason for being.
- Confining specialization to Reserve forces risks jeopardizing its credibility with regular forces.

3. Historical Background

“Misunderstanding the new expressions of war would be to condemn oneself not to prepare the right tool, and to lose subsequent engagements. Defeats are rarely technical; they are first born of misunderstanding. Both recent and earlier history must warn us because it does not prove that we are naturally excellent in probable war.”¹⁹

This chapter is entirely inspired by a remarkable book, La guerre psychologique des origines à nos jours, by Paul Villatoux, Images d’histoire collections – L’esprit du livre editions, from which large excerpts were reproduced (in French) with the author’s permission. I would like to pay tribute here to this extraordinary work by Mr. Villatoux, and invite you to consult his book for further reference.

3.1. Antiquity

“Ruses, stratagems, deceits, camouflages and tricks are as old as war itself and their use, often considered a substitute for violence, is written in the mists of time.”²⁰ As far back as memory, in primitive societies, it is common to mount ambushes both for war and for hunting, by mutual inspiration.

In China, 600 years before our era, Sun Tzu wrote *The Art of War*, the oldest Chinese military classic, and undoubtedly the ancestor of all modern Information Operations manuals. Revealed to the West only in the 18th century by a Jesuit monk, Father Amiot, this treatise is presented in thirteen articles broaching not only battle design and planning, but also their context and economic, political and social consequences. With considerable advances over Western theorists, Sun Tzu repositioned war into a political continuity. Preoccupied with economy of force, he declared that “war is the art of duping”, in order to lead the enemy to make mistakes. “...[T]he skilful strategist subdues the enemy without fighting; he captures his cities without attacking them.”²¹

Around the 15th century, during the Ming Dynasty, the secret collection *Thirty-Six Stratagems* was a vulgarization of Sun Tzu’s thoughts and presents, in six chapters, the most famous ruses of Chinese history.

In the West, the emergence of writing, commercial exchanges, lines of thought and their formalization into philosophical schools, made the countries around the Mediterranean the cradle of theorization and of the modern application of psychological war practices. The Bible and stories of ancient Egypt are chock-full of examples.

It was, however, in Greece, where the art of war developed really early on, outside the limits of traditional confrontation, that we find the most accomplished examples of new theorization. The “Trojan Horse” episode comes readily to mind. So too, though, does the Athenian historian, chronicler and philosopher Xenophon who, in his treatises, made numerous references to “a means of making a small cavalry troop appear numerous, and conversely, make a large troop look small.... for there is truly no instrument of war more useful than chicanery.”²²

¹⁹General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007). (Free translation.)

²⁰Paul Villatoux. *La guerre psychologique des origines à nos jours* (Paris: L’esprit du livre, 2008). (Free translation.)

²¹Valérie Niquet. *L’Art de la guerre de Sun Zu, traduction et édition critique* (Paris: Economica, 1988).

²²Xenophon. *Anabase* (Paris: Les Belles Lettres, 1968). (Free translation.)

Philip of Macedonia, Alexander the Great's father, achieved the unity of Greece essentially through psychological work where rumours, campaigns of slander, and information submerged public opinion, military operations being nothing but the exploitation of what was gained through propaganda.²³

In Rome, Julius Caesar was one of the very first to use information as a means of psychological action. "Acta diurna", posters displayed at crossroads, in public places, and within armies and administrations, were only one of the many ways used to expand Rome's influence to the borders of the Empire.

3.2. Times of Intrigue

After the fall of the great empires because of Barbarian hordes, the Western kingdoms reconstituted through Medieval times. The embryo of political crystallization used emerging Christianity as the mortar and foundation of values on which nations would be built.

In 1129, under the direction of Hugues de Payns, the transformation of a militia, the "Poor Fellow-Soldiers of Christ and of the Temple of Solomon", into the "Order of the Temple", was the beginning of a two-century adventure that witnessed the birth of a gigantic network of influence. Using the support of an armed component and a strong financial structure, the Templars expanded their influence throughout Europe and the Middle East. From initiation ceremonies, through uniforms and writings, to secret treasures, everything contributed to a strategy of influence based on a strong image. Their fall in 1314 was the result of a wide campaign of slander and disinformation led by King Philip the Fair, in order to get out of financial strangulation.

In parallel with wars and various confrontations, the political game relied on a wide variety of intrigues. Constant worry about intelligence, poisonings, and disinformation were key to the success of the Medicis. In 1520, the Field of the Cloth of Gold meeting between Francis I and Henry VIII was a vast information operation that aimed at distancing England from the influence of Charles V, and to consolidate an alliance through a marriage between the heir apparent of France and Mary Tudor.

In France, Louis XIV was making a brutal change in the strategy of information required to control the kingdom. He changed the concept of a traveling court — covering the kingdom from castle to castle — to a sedentary court based in Versailles. The parties thrown there allowed for a tight control of influences and a concentration of power.

3.3. Times of Revolution

The French Revolution, the Spanish Uprising, the October Revolution, and the Long March are some of the milestones of the revolutionary current that has shaken the world since the 18th century.

In 1793, on the heels of the French Revolution, was born the Reign of Terror, a radical policy that was meant to allow responding to dangers that threatened the First Republic. In his *Report on the Political Moral Principles that Must Guide the National Convention in Leading the Republic*, Robespierre wrote: "The first maxim of our policy must be that we lead the people with reason, and the enemy of the people with terror. If the flexibility of the popular government in peacetime lies in virtue, then its

²³Maurice Megret. *Que-sais-je, No. 713: La guerre psychologique* (Paris: PUF 1956). (Free translation.)

flexibility during a revolution lies both in virtue and in terror. Without virtue terror is fatal; and without terror virtue is powerless. Terror is nothing more than prompt, strict and inflexible justice; it is therefore a manifestation of virtue; it is less a particular principle than the consequence of the general principle of democracy applied to the most pressing needs of the homeland." This virtue, however, becomes like that of Machiavelli's *Prince*, less a moral virtue than a political one, whose ultimate plan is to retain power. Terror is based on the exaggeration of violence as a vehicle for a strong message intended for enemies of the Republic.

The Spanish Uprising against the Napoleonic occupation (1807-1812) witnessed the emergence of the term "guerrilla", or small war. Already used during the war of the Gauls against Caesar and in the Middle Ages between the French and the English, the guerrilla mutated in the 16th century during the holy wars. It is "a tactic adapted to psychological, geographic or political possibilities, to a given ratio of force."²⁴ The fact that the guerrilla used an irregular armed force fuelled by a population whose original military organization was inadequate, drove leaders of the insurrectional movement to use means of persuasion aiming at forcing the population to support it and to take up arms.

The 1814 Vienna Congress granted the guerrilla a minor place. Definitions of war and peace, as well as distinctions between combatants and non-combatants, gave partisans a marginal place. We had to wait until 1930 to see a remodelled guerrilla reappear.

Mao Zedong, the most spectacular heir to Chinese traditional military thought, was without a doubt one of the most brilliant theorists of modern revolutionary thought and action. Always fighting in a state of inferior manpower, he used, in a quasi-systematic fashion, the indirect approach. During the Long March, he meditated and theorized simple principles: "When the enemy advances we retreat to avoid him; when the enemy stops we harass him; when the enemy is tired we attack him; and when the enemy retreats we chase after him!"²⁵ Mao took credit for Sun Tzu's fundamental principles about ruse and surprise. "It is often possible", he wrote, "by various ruses to succeed in leading the enemy to harm himself by making false judgements and following a wrong path, thus losing his superiority and the initiative."²⁶

Well aware of the importance of population, as described in the previous paragraph, Mao built it into a precept: "The revolutionary combatant must move amongst the people as a fish swims in the sea".²⁷ Indeed, the true political objective of revolutionary war is the populace itself.

Twentieth-century guerrilla warfare was fundamentally different from its ancestors, from the Middle Ages to the 19th century. A new factor was added: the ideological factor. Guerrilla warfare, from a simple tactic, became an instrument of ideological propagation. This psychological element marked not only the difference but the link between guerrilla and revolutionary war. This is how the party that wages revolutionary war "simultaneously uses psycho-political means and military means, the military effectiveness of one being no less obvious than the psycho-political effectiveness of the other."²⁸ This aspect is entirely essential and marks the close link that unites, for Mao, the political and the military:

²⁴Claude Delmas. *Que-sais-je, No. 826: La guerre révolutionnaire* (Paris: PUF 1959). (Free translation.)

²⁵Mao Zedong. *La guerre révolutionnaire* (Paris: Union générale d'éditions, 1962). (Free translation.)

²⁶*Ibid.*

²⁷*Ibid.*

²⁸Raymond Aron. *Penser la guerre – Clausewitz* (Paris: Gallimard 1976).

“Political power comes out of the barrel of a gun. War is a particular political means, something we use to achieve a political aim.”²⁹ This is why, on the one hand, the sociopolitical conditions of revolutionary war must be as favourable as possible: “Revolutionary warfare exploits the political and psychological dimensions of people within a social geography. That is why any use of revolutionary warfare must be subjected to a rigorous political analysis in order to determine the psychological trends and the meaning of the evolution that is taking place. The resort to revolutionary warfare is possible whenever psychological conditions permit incitement to uprising of populations.”³⁰ The following phase consists in winning what is called the “support of the masses”, meaning of a part of the population, by a set of very precise techniques of influence on attitudes and opinions: persuasion, indoctrination, selective use of terror to eliminate the adversary’s agents, intimidation, and agitation.

This psychological action is carried out according to two basic principles: education and organization. In controlled territories, education is led with the aid of slogans and “has as a direct aim not so much agitation and revolt as a slow and deep permeation”.³¹ The favourite location to exercise this process is the army whose members receive continued education, both theoretical and concrete, with a view to raising their political knowledge. Prisoner enemy soldiers are subjected to intensive propaganda, which came to be known as “brainwashing.” Once released, they will become true agents of subversion.

3.4. The Particular Case of Colonial Warfare

While other countries like England or Portugal have tried it, the French colonial adventure remains a particular case which deserves our scrutiny. It was a melting pot of theorization and of psychological action that would generate some of the greatest theorists; Gallieni, Lyautey, Lacheroy, Hogard, Némou, Galula, and Trinquier, to name but the most renowned.

The French colonial military experience has a place apart in the history of strategy. In the 19th century, the French colonial empire developed thanks mostly to the initiative and efforts of local and scattered officers for whom life in a garrison held no attraction. Three field marshals, by building up overseas French colonies, thus developed two strategic theories and new tactics. The importance of the ideas and teachings of Field Marshal Bugeaud (1784-1849), Field Marshal Gallieni (1849-1916), and Field Marshal Lyautey (1854-1934) was justified not only in their conquests and their writings, but also in the role played by the heirs to their thinking in 20th-century wars. In fact, we had to wait nearly half a century before the principles and methods of colonial warfare were developed, then officially recognized. Different from continental warfare by its means — quantitative inferiority and lack of knowledge of space — its goal was also different. Indeed, the idea is not to annihilate the adversary but to subdue him at the least cost that will guarantee his permanent pacification. As soon as he arrived in Algeria in 1840, Field Marshal Bugeaud decided to apply methods he had inherited from his Spanish guerrilla experience. He understood that the fear now instilled by his French troops within local populations gave them a moral prestige that allowed him to economize on his material forces. He was the first 19th-century soldier to reject Napoleonic strategic teachings, and renew Roman methods, while laying the foundations of a military school of thought that would flourish for the next fifty years. Leading this school of thought, Field Marshal Gallieni was the symbol of a new generation of officers of purely

²⁹Mao Zedong. *La guerre révolutionnaire* (Paris: Union générale d’éditions, 1962).

³⁰*Ibid.*

³¹Jacques Ellul. *Propagandes* (Paris: A. Colin, 1962. Paris: Economica, 1990).

colonial training. For his first twenty years of campaigns on Reunion Island, in Africa, and in the Antilles, he acquired a vast experience in various fields. But it was in 1892, when assigned to Tonkin, that he showed the full range of his talent after achieving amazing results in peacemaking and development. In four years, he used his military means less to wage war against elusive “pirates” than to achieve a progressive occupation, revive the economy of that frontier zone, and raise the population’s standard of living. In 1896, he was appointed Governor General of Madagascar, an island conquered the previous year, and to which it was now up to him to bring peace. He profited from his experience in Indochina to achieve a peaceful occupation of the island. In his May 22, 1898, *Instructions*, Gallieni presented his methods, which were destined to be used as a model for generations of colonial officers: “The best way to achieve peace is to use the combined action of force and politics. We must always treat the country and its inhabitants carefully, because the former is destined to receive our future colonization undertakings, and the latter will become our main agents and collaborators in leading our undertakings to success. Each time incidents of war force one of our colonial officers to act against a village or a populated centre, he should not lose sight of the fact that his first duty, after the inhabitants have been subdued, will be to rebuild the village, create a market, and establish a school. It is from the combined action of politics and force that peacemaking of the country, and the organization to be given that country in the future, must stem. Political action is far more important. A country is not conquered and pacified when a military operation has decimated the inhabitants and bowed all heads through terror. Once the first fears are alleviated, ferments of revolt will germinate within the masses, arising again from harboured resentment caused by the force’s brutal action. Destroying is easy; rebuilding is much harder.”³² The primacy of political action and the organization of the social environment; mobilization; and control of populations by the famous market organization — these are all principles that Lyautey, a student of Gallieni’s, set out to take on again and to develop. It was indeed in 1899 that Lyautey, General Gallieni’s Chief of Staff, stated ideas and doctrines of the new colonial military school in a brilliant article published in a magazine of both worlds. It was in Morocco, at the start of the 20th century, that General Lyautey finally had the opportunity to implement his theories. Instead of increasing the number of fortified posts, he created centres of attraction such as the city of Colomb-Béchar. When he had to fight a hostile tribal chief, he undermined the latter’s authority amongst the tribe by relying on indigenous auxiliaries. Through his very progressive action, he thus played rivalries between heads of tribes. This is the totally successful strategy of the “oil spot”.

While after 1900 few significant innovations were made to the ideas expressed by Lyautey in his article “Du rôle colonial de l’armée,” it remains obvious that French colonial officers were the first imitators of peacemaking through conquest of hearts and indirect strategy, all things that would deeply influence the African Army, and would widely be taken on subsequently as part of French psychological action operations.

3.5. The First World War

With the Battle of Valmy, the French Revolution had launched the concept of economic and spiritual mobilization of a nation at war. The First World War greatly increased this idea and made it appear as a new phenomenon. Populations truly formed part of martial enrolment. Consequently, political and

³²Quoted by Jean Gottmann. *Bugeaud, Gallieni, Lyautey: développement de la guerre coloniale française* (Paris: Flammarion, 1985).

military decision-makers became aware of the need to mobilize minds and to implement propaganda intended to weaken the adversary's morale. This initiative would be facilitated and reinforced by the previous century scientific and technical advances, particularly where communication was concerned.

Early in the conflict, Germany was the only country to possess the seeds of a propaganda organization. However, it was very weak because of its obvious lack of psychology. In addition, the lack of collaboration between civilian and military leaders generated confusion that lasted until the end of the war. "German propaganda will remain useless. It was lacking the two essential foundations that ensure the success of any propaganda: a strong organization and a preliminary action plan based on precise psychological knowledge."³³

France responded late. The strength of public opinion was underestimated. Several organizations and services were created throughout the war: a press office charged with censorship, a group of war correspondents to the armies, and even the army's photographic and cinematographic section. They sought to fashion opinion and to condition minds by developing various themes: A nationalist theme (defending national soil against the invader, recapturing the lost provinces of Alsace and Lorraine), a democratic theme (war of right, war of liberty) and a theme inspired by the old pacifist ideology: In fighting against Germany, one was fighting against militarism and war.

The British school of thought was deeply marked by this conflict, leading it to reformulate its theory of indirect strategy, to which it was already quite attached by tradition. Captain Basil Liddell Hart was its most brilliant representative. Staunch supporter of what he called the indirect approach, he believed that "perfection of strategy will mean reaching a decision without serious combat. Although these types of victories, without bloodshed, are exceptional, their scarcity increases rather than reduces their value as an indicator of latent potential of strategy and grand strategy. In spite of the many centuries' experience of war, we have barely begun to explore the domain of psychological war."³⁴ According to Liddell Hart, to use the indirect approach is to focus one's attention on the following principles of war: surprise, mobility, decision, and concentration. "In studying the physical aspect, we must never lose sight of the psychological aspect, and it is only when both are combined that strategy will be the indirect approach, calculated to upset the balance of the adversary."³⁵ As early as 1915, British propaganda services developed and published a damning report on German atrocities in Belgium and in occupied French territory. The Bryce report, translated in thirty languages, had a sensational impact. At the end of the conflict, British propaganda reached an unparalleled level of perfection and effectiveness.

British propaganda was probably a notable factor in the United States' joining the war. The US was going to contribute its know-how in the matter. As Marc Ferro reports,³⁶ "the undisputed masters of brainwashing were the Americans. Thanks to their advances in the field of social sciences, they used more elaborate techniques than the French or Germans." Their psychological war service wrote false dispatches, such as the "Dispatch from Stockholm", as well as a number of brochures, films, news stories, correspondence, photos, and books intended to ruin enemy morale and to propagate President Wilson's

³³Jacques Driencourt. *La propagande, nouvelle force politique* (Paris: Armand Colin, 1950).

³⁴Basil Liddell Hart. *The strategy of indirect approach* (London: Faber & Faber, 1942).

³⁵*Ibid.*

³⁶Marc Ferro. *La Grande Guerre, 1914-1918*, (Paris: Gallimard, 1969).

message. This message, developed in “Fourteen Points”, was submitted to Congress on January 8, 1918. It contributed to undermining the central empires’ will to resist, and accelerated the dissolution process within the Austro-Hungarian armed forces. The Allies realized only later that a propaganda action unit was needed. From March to August 1918, three combined propaganda conferences were convened, the first one in Paris, and the subsequent two in London.

In all camps, press caricatures and drawings became propaganda weapons: “It is important to show the legitimacy of the fight, to glorify the strength of one’s country’s industry and technology, to refer to the nation’s cultural, historical and moral values, to glorify military leaders and homeland defenders, to extol the patriotism of the populace, and to stigmatize pacifists, shirkers, and profiteers.”³⁷

The use of photographic and cinematographic images established itself even more in the field of information. In France, as in Germany, camera operators followed close on the heels of the military painters and illustrators who slowly made way for them. Photography established itself amongst civilians by a stronger perception of truth and objectivity.

But it is undoubtedly the war of tracts that influenced the first world conflict. At first, it was the isolated initiative of a few aviators. The effects were non-existent. The argumentation was childish, the style defective, and the effect negative; their only practical result was in hardening the adversary in his fight and in his hostile dispositions. Field Marshal Joffre decided as early as 1915 to centralize these initiatives and to make them into total propaganda. These were multiform: printed sheets, sometimes illustrated, newspapers, brochures, documents of all kinds, written in the adversary’s language and intended to undermine their morale by convincing them that the cause they were defending was bad, or by allowing them to discover some information — true or false — that censorship had hidden from them. Tracts were distributed by air or through artillery. The total number of tracts distributed by the Allies during the First World War is estimated at sixty million, fourteen million of which were dropped in September 1918 alone.

During the interwar period, Hitler never stopped repeating and exploiting the theme of a Germany intellectually and not militarily defeated: “What we were lacking was brilliantly exploited by the adversary. From this enemy war propaganda, I was tremendously instructed. The German army learnt to think as the enemy wanted it to. It was defeated because, in 1918, a revolution broke out whose watchword had been given by enemy propaganda.”

In another context — the Arabian Peninsula — at the end of the First World War, Lawrence of Arabia helped demonstrate the pertinence of the indirect approach. Thanks to an encirclement technique, which was both material and psychological, military and non-military, he succeeded in defeating the Turkish power that had nevertheless resisted the Allies in the Dardanelles. In that case, Lawrence was relying on a few thousand ill-equipped Bedouins, to face a Turkish army that was modernized and fully imbued with Prussian strategy: “It was in large part on psychology that the Arab Front victory depended,” he maintained. “The printing press is the master tool in the modern leader’s arsenal. In Asia, we were physically too weak to exclude the psychological weapon.”³⁸

³⁷Cécile Coutin. “Pourvu qu’ils tiennent...Les Français”! — La Contribution de Forain, dessinateur de presse, au moral des Français pendant la Grande Guerre, *Guerres mondiales et conflits contemporains*, No. 173, 1994.

³⁸Thomas Edward Lawrence. *Seven pillars of wisdom* (New York: BN Publishing, 2009).

3.6. The Second World War

The interwar period was essentially marked by the significant development of political propaganda, supported by technological advances such as radio sets. Totalitarian regimes seemed favoured by the absence of multiple political parties, and by the centralization of decision-making bodies. A book also marked that era: Serge Tchakotime's "Le viol des foules par la propagande politique."³⁹ Censored by the French, and then destroyed by the Germans, it would be re-edited only after the war.

From all the evidence, Germany had obviously prepared for this conflict. The Nazi Party granted a pre-dominant place to propaganda. Joseph Goebbels was its champion and to this day his name is inseparable from the concept of propaganda. Very early on, Hitler was very clear on the importance he assigned psychological warfare: "What artillery preparation meant for infantry attack in trench warfare will be replaced in future by psychological disruption of the adversary through revolutionary propaganda, and even before armies are involved. It is vital that the enemy nation be demoralized, that it be constrained to surrender, that it be morally forced into passivity, even before considering military action. Will we achieve the adversary's moral defeat before war? That is the question that interests me."⁴⁰ The War Department psychology lab used the results of the latest research in sociology. "The tasks of psychological warfare consist in giving the people and the ground forces a homogeneous national consciousness, through national training, military education, and the awakening of a national will to resist. These also include all the measures to build a rampart around the people and the army, to repel and weaken all enemy attempts to influence and demoralize the country."⁴¹ Joseph Goebbels, in particular, created an integrated structure whereby the means of propaganda relied on the press, radio, Ground Forces Supreme Command, and especially Admiral Canaris's Abwehr. The day after the invasion, propaganda units stabilized the population and favoured the German troops' movements.

In France, the peacetime preparation had seen a few timid attempts in the field of psychological actions. The only serious one was the instruction for Raymond Poincaré's *The Workings of Information in Wartime* in 1929. The project was put on ice. In 1939, the next government created the Ministry of Information Office (MIO), under author Jean Giraudoux's authority. By the wrong person at the wrong place, the project failed. In addition, the staff had little faith in the effectiveness of propaganda. It is true that nothing tended to prove them wrong, especially not the weekly bulletins distributed to officers to fuel their conversations with the troops. Those bulletins revealed exemplary poverty, with no guiding idea or central theme. In June 1940, France was in a petrified state of shock. On June 22, under German orders, all radio stations had to stop broadcasting. Three days previously, British planes had dropped tracts over France reproducing the text of a message broadcast the day before by General de Gaulle.

In London, Winston Churchill found the right words. Having nothing else to offer than "blood, sweat and tears," he rallied the British people around him, sustained by a Ministry of Information (MOI) that supervised BBC broadcasts. At the same time he created a political war department, established by a Canadian, Colin Campbell Stuart, which was quickly integrated into the Special Operations Executive (SOE).

³⁹Serge Tchakotime. *Le viol des foules par la propagande politique* (Paris: Gallimard, 1952).

⁴⁰Hermann Rauschning. *Hitler m'a dit* (Paris: Livre de Poche, 1979).

⁴¹Blau. Quoted by Volker Berghahn, "Tendances de la Wehrmachtpropaganda", *Revue d'histoire de la Deuxième Guerre mondiale*, No. 84, October 1971.

Following internal conflicts, it was decided to create an independent body of psychological warfare, the Political Warfare Executive (PWE), in charge of coordinating official propaganda as well as “black” propaganda. “Psychological operations are intended to create confusion, despondency and mistrust among enemy combatants, a lack of trust in leaders, defeatism, and the desire to end hostilities.”⁴² The ensuing lack of coordination led to the creation of two new groups: the Office of War Information (OWI) and the Office of Strategic Services (OSS). Later on, OWI, OSS, MIO and PWE would be integrated within a new section of psychological warfare, the Psychological Warfare Branch. From the landing in North Africa to the Sicilian Campaign, these units went from success to success. Yet, this psychological warfare still remained confined to an accessory role. The allied psychological warfare organization essentially set tactical targets in favour of General Eisenhower’s military war machine and undertook limited actions on Germany’s inner morale only to alleviate the frontal psychological action against Atlantic combatants.

The Allied landing in Normandy provided an opportunity for a multitude of psychological and deception operations. Among the least known, yet most effective, was the effort deployed to convince German soldiers to surrender. “We were able to strengthen in the German soldier the acceptance of defeat, and we achieved this through various means. For example, we provided the German soldier with justifications to reconcile surrendering with his soldier’s honour. We insisted on the following themes: “Resistance is suicide, and fighting after the war is lost is insane.” Recognizing the fact that, for the German soldier, surrendering was something totally unheard of, we educated him precisely on the way to surrender in complete security.”⁴³ The undertaking had a huge success. Numerous German soldiers surrendered, and most of these prisoners were carrying a “surrender note”. If we go by the numbers provided after the war by the American services, Allies dropped, from 1939 until the Normandy landing, a total of 757,000,000 tracts over occupied France, and 123,000,000 over Germany and other occupied countries.

In the Pacific, the implementation of the psychological and informational weapon encountered several obstacles. First, the integration of British, French, and Dutch propaganda services clashed with the Americans who refused to be entirely of their opinion of a colonial *status quo*. To this was added a gigantic logistical problem, essentially linked to the difficulty in locating the enemy. Finally, the most serious problem, over which Allied psychological warfare constantly stumbled, was the persistent will of the Japanese soldier to never surrender. News media never stopped denouncing his cruelty, or his fanaticism that could go as far as suicide. The effect was a reinforcement of the Allied soldier’s hatred towards the Japanese combatant. Consequently, the most important thing was no longer to capture him, but to kill him. “Psychological warfare was something new for professional soldiers and sailors; I am not sure it had any impact on the Japanese. In fact, the best psychological warfare to wage against these barbarians was to bomb them; and that is what we did, aggressively.”⁴⁴

In the East, the June 1941 German offensive caught everyone by surprise. German propaganda banked on the theme of freeing oppressed people from under the yoke of communism. They went so far as to return a brilliant Russian Army officer, General Vlassov, and created an anti-Bolshevik national political movement. The culmination was the “Smolensk proclamation”. For the first time, populations were

⁴²Circular of March 16, 1941.

⁴³Colonel Davis. *Conférence sur l’action psychologique (Conference on Psychological Action)*, IHEDN, July 1955.

⁴⁴William Leahy. Roosevelt’s Chief of Staff, quoted by Clayton Laurie, “The Ultimate Dilemma of Psychological Warfare in the Pacific”, *War & Society*, May 1966.

presented with specific political objectives: the annihilation of Stalinism, the conclusion of an honourable peace with Germany, and the creation of a new Russia. Internal contradictions between the developed strategy and its tactical application did not allow this tool to reach its full potential.

The Soviet response was skilful and effective. Stalin found the right tone to awaken the “Russian Soul”. Banishing the overly revolutionary “comrades” in addressing the nation, Stalin again took up the old call that had united the national community through the centuries: “Brothers and sisters, a grave danger threatens our homeland.” References to “Plekhanov’s, Lenin’s, Belinski’s, Tchernychevsky’s, Pushkin’s, Tolstoy’s, Glinka’s, Tchaikovsky’s, Gorki’s, Chekhov’s, Lermontov’s, Suvorov’s, and Kutuzov’s great Russian Nation” were used to support the “sacred war”. Religious slackening made it possible for the Orthodox Church to contribute to reconciling the populations. Soviets even tried to form a replica of the Vlassov army with the creation in September 1943 of the League of Officers, thanks to the initiative of Field Marshal von Paulus’s six generals. This attempt did not meet with a favourable response.

In fact, from the end of 1943, Stalin was already dreaming of a final peace by political re-education.

3.7. Modern Conflicts and Terrorism

3.7.1. The Cold War

Less than two years after the war ended, former allies turned out to be fierce adversaries, in an unprecedented international situation and through a renewed ideological conflict. Psychological warfare then took on a great significance.

On March 5, 1946, in Fulton, Winston Churchill gave a speech in which he declared that an “Iron Curtain has fallen over Europe.” Stalin did nothing to dispel that impression. The Blockade of Berlin and the Spring of Prague, the Spring of Budapest, and the Spring of Warsaw confirmed the adversity in both camps. The activity of the various Soviet Parties was centralized and coordinated by a new information office, Kominform. Insurgent and subversive movements shook the west, often in the form of strikes. The USSR used a multitude of “agents of influence” in the media, universities and special services from western countries, whose role was to take over the many “disinformation” campaigns launched by the Soviet Union during these first years of the Cold War. In a context dominated by the great atomic fright, psychological warfare appeared to be the tool preferred by international communism to attain its goals. International commentators did not fear arguing, without beating around the bush, that “the psychological weapon is to the Cold War what the atomic bomb was to hot war; it is the Cold War’s number one weapon.”⁴⁵

The United States, which had demobilized its psychological warfare apparatus, was rushing to set it back up. The Allied Coordination Committee created a review group, the Special Studies and Evaluation Subcommittee, in charge of preserving the American gains in psychological warfare, and ensuring the presence of personnel qualified in the subject matter, who could step in if need be. In July 1947, the simultaneous creation of the Central Intelligence Agency and the National Security Council, reporting to the President of the United States and in charge of the entire American political-military strategy, finished giving a new impetus to the deployment of psychological operations over the Atlantic. Alongside these

⁴⁵Jean Joba. *La guerre froide*, conférence IHEDN (IHEDN Conference on Cold War), December 1949.

official structures, the United States deployed a veritable “cultural diplomacy” in Europe, such as the export of Hollywood movies, Coca-Cola, and the ideal of American life, to name but a few aspects. In fact, as early as January 1948, the American Congress, then the President, approved a law called “Smith-Mundt”, aimed at promoting a better understanding of America amongst peoples of the world, and reinforcing a spirit of collaboration in international relations. Radio broadcasts were used fully (BBC, *Voice of America*, *Ce soir en France...*), as well as the distribution of tracts and underground newspapers by the hundreds of thousands.

However, the conflict was not only “cold”. It took on more clearly military forms in remote theatres, such as Korea. The Korean conflict witnessed the creation of the first US Company of loudspeakers and tracts, as well as the founding in Fort Bragg of the Psychological Warfare Center. This would be the first field for testing of military operations of psychological warfare. The themes developed by American propaganda over the Korean theatre were classics and could be summed up in four main ideas: (1) the Communist cause is illegitimate; (2) the pursuit of combat is synonymous only with suffering and death; (3) surrender is safe; and (4) the United Nations advocates peace and reconciliation. On the Korean side, an essential stage of psychological warfare was related to the treatment of United Nations prisoners of war captured by North Korean and Chinese troops, and subjected to “brainwashing” methods and psychological indoctrination.

3.7.2. Decolonization

For its part, France, a vast colonial empire, initiated what would become a long and painful experience of nationalist revolutionary wars. Troubles began immediately in the Far East. With a wealth of colonial tradition and its experience from the last war, the French military created a fifth integrated office at the expeditionary force staff. Its action consisted essentially of distributing tracts, and it showed itself quickly unsuitable. The Viet Minh operated based on almost the same strategy that made the Communists successful in China. Notably, they succeeded bit by bit in weaving a veritable spider web, encircling the populace tightly in a complex system of associations and territorial and military groupings, that the French military called “parallel hierarchies”, that allowed it to be rendered more susceptible and receptive to a propaganda that skilfully mixed nationalist and communist themes. Confronted with such a powerful adversary, the French military decision-makers sought, throughout 1946-1949, innovative combat methods. This was especially so since the expeditionary force manpower soon proved inadequate to durably control, by their constant presence, people as well as minds. Psychological warfare, then, appeared just like a new tool, particularly well-adapted for the type of combat France and its army had to face. In 1947, a press and information service was created, reporting directly to the chief commanding general and comprising five sections (Information, Propaganda, Photo Lab, Finance, and the *Caravelle*, a newspaper intended to stimulate the expeditionary force’s morale). Moreover, each territory was equipped with a Propaganda Section under the home Propaganda Section’s supervision and reporting to an officer. What was then called “psychological action” was very similar to the “black” propaganda operations founded on the propagation of false Viet Minh documents through tracts and fake newspapers. The Propaganda Sections were crossing their sectors, but lacked qualified manpower. The head of mission was charged with producing propaganda but he did not speak Vietnamese, and had no knowledge of the customs or the country.

It took until January 1st, 1953, for the establishment of a real Psychological Warfare Office (PWO) reporting directly to the General in Chief of the Joint Staff and Land Forces (JSLF). This new body officially received as its mission “to attack the enemy’s morale and will to fight” and “to defend, support and ‘boost’ the friendly troops’ morale.”⁴⁶ This belated effort did not have lasting impact on military action. But it served as the framework, by the end of 1954, for the implementation of a truly French psychological warfare doctrine based on the lessons learned from the fight in Indochina and the painful experience of Viet Minh rehabilitation camps. Colonel Charles Lacheroy was the first to update the “parallel hierarchies” system and to theorize a war called “revolutionary”, fomented by international Communism and supporting the geostrategic interpretation of a process of Communist expansion on a worldwide scale.

Thus, the Algerian conflict was interpreted by Lacheroy and his emulators, from the early hours of November 1954, as an obvious manifestation of this global mechanism of planet-wide subversion. If we were to believe them, doubt was no longer permitted: the Soviet Union, rather than going for a frontal and classic attack on the West, sought to bypass NATO’s defences using a peripheral strategy, whose way was paved in the Far East (Indochina, Malaysia, and Korea) before reaching the South of the European continent via North Africa (Tunisia and Algeria).

In 1956 a young officer, Jacques Hogard, soon realized the scope of the upheavals, complex and polymorphous. “We are faced with a transformation even more radical than formerly imposed by the French Revolution on the political and military concepts of the time: war became permanent, universal, and virtually ‘total’. It was up to us, imitating the European people from the early 19th century, to put ourselves through the enemy’s school, to agree to the transformations and sacrifices essential to our salvation, and to forge new tactics that would lead us to victory.”⁴⁷ Integrating economic, political, cultural, and societal factors into his taking reality into account, Jacques Hogard was much more than an officer; he was a strategist anticipating the upcoming divides. Foreseeing the future lines of fracture, he integrated into his analysis the power of ideas in a changing world. “Hogard thus realized the ‘vital [necessity] to transform our mentality and politico-military apparatus.”⁴⁸ Much more than Galula, who drew his inspiration from their works to the benefit of American circles of influence, Jacques Hogard, a man of action and reflection, established himself, along with Roger Trinquier, Charles Lacheroy and Jean Némó, as the true thinker of the “revolutionary war.”⁴⁹

For the theorists driven by nearly religious faith, the stigmatization of danger did not need to be limited to a simple verbal fight, but had to be a part of the reality of the facts in the field, in Algeria as well as in the metropolis. In November 1954, a Psychological Warfare Training Centre (PWTC) was opened at the École Militaire, in Paris. The first structures of psychological action appeared in the Algerian theatre only in March 1955, with the setting up of a regional psychological action office. It was only from the beginning of 1956 that the political powers, in search of new solutions, were convinced of the idea of giving priority to the massive use of psychological weapons in the Algerian theatre. Lacheroy was

⁴⁶ Organization note from the Psychological War Office, No. 190/GP, March 28, 1953.

⁴⁷ Jacques Hogard. "Guerre révolutionnaire ou révolution dans l'art de la guerre," *Revue de Défense Nationale*, December 1956.

⁴⁸ Marie-Catherine Villatoux. "Hogard et Némó – Deux théoriciens de la ‘guerre révolutionnaire,’” *Revue Historique des Armées*, No. 232 (2003).

⁴⁹ *Communication & Influence*, No. 18, March 2010.

promoted to the rank of Chief of the National Defence psychological and information action service, created especially for him. Some “psychological action travelling officers”, recruited among the survivors of Viet Minh camps, were sent to army corps and zones not only to conduct a wide campaign of deprogramming and rehabilitation of the Muslim population; but also to convince all the leaders of established units, up to company level, of the validity and usefulness of psychological weapons.

Although for several months Lacheroy had been attempting to integrate the use of psychological weapons within staffs and command, a major turning point intervened in 1957, with the publication of the first official regulation, intended to make psychological fact part of all the officers’ preoccupations and reflexes: TTA 117, or *Interim Instruction on the Use of Psychological Weapons*. Created in 1957 by Marcel Bigeard, the Arzew School of Psychological Warfare (Algeria), called *Centre d’Instruction à la Pacification et à la Contre-Guerrilla* (CIPCG), was one of the two leader training centres on psychological war. Between 1957 and 1960, more than 8,000 officers and non-commissioned officers attended it. Open to foreigners, it trained Belgian and Portuguese students in fighting against independence movements surfacing in the Congo, Angola, and Mozambique. Their instructors were mostly Indochinese war veterans. Like Bigeard, a Dien Bien Phu Battle veteran, many had been taken prisoner, and subjected to the psychological work of Viet Minh political commissioners. Strengthened by their experience, they applied it against the FLN.

The proponents of psychological weapons in France encouraged the government and high command to redefine the very organization of the military system, by progressively developing a doctrine, and by devoting themselves to creating a body of specialists holding a specific certificate. The ambition that drove them was clearly in line with an identity-related process, the ultimate consequence and establishment of which could have been the emergence of a new army. Its population would have constituted a new field of activity: a “fourth dimension”, on the whole. This peculiarity very clearly distinguishes the French experience that can in no way compare to those of other great Western democracies of the same era.

In a little less than three years, between 1957 and 1960, Algeria established itself as a favourite field of activity for the large-scale use of psychological weapons that the five newly created Propaganda Sections were charged with implementing. Present everywhere, and directing the action of all the other land force components, these bodies gained such an importance that at the turn of 1959-1960, the discourse they were determined to promote, based mostly on the theme of “French Algeria”, ended up conflicting with the political will of General de Gaulle, who was back in power thanks to the May 13, 1958, movement, of which some protagonists were among the fiercest advocates of psychological weapons.

Prisoners of a “truth gone mad”, a great number of the latter felt betrayed by General de Gaulle’s decision to give Algeria its independence. They were progressively isolated. A February 1960 decision definitively abolished the Propaganda Sections. With the end of the Algerian conflict in 1962 and its ultimate heartbreaks, the last relics of the French psychological warfare organization disappeared, while all the studies related to this theme were pulled from the military teaching programmes.

In the years to follow, the British and French put an end to their long and painful decolonization phase. Priority was given to nuclear weapons, and psychological warfare showed an unquestionable decline. For Americans, British, and French, psychological warfare became an export product, notably to the

benefit of South American dictatorships. CIA members, and former theorists of the Algerian War or the Malaysian Uprising, were therefore dispatched to Chile, Argentina, or Bolivia, to teach methods of psychological warfare in accordance with agreements of military co-operation with authoritarian regimes already in place. This episode probably constitutes one of the most questionable aspects of the Western experience in this field in the 1960s.

3.7.3. Vietnam

Even before the French left Indochina, the CIA, already in place in the person of the “Quiet American”, Colonel Edward Lansdale, started establishing networks and initiating psychological action campaigns in favour of Ngo Dinh Diem. However, no specialized psychological warfare unit other than the CIA was yet officially present in the peninsula. It was not until 1965 and the beginning of the American spiral in Vietnam that the 4th PSYOPS Group was born. However, the psychological warfare effort remained relatively modest. The tract constituted, traditionally, the means the most used by PSYOPS units. Between 1965 and 1972, nearly fifty billion tracts were distributed, mostly by plane, over the whole Vietnamese territory, including the North, and all along the Ho Chi Minh Trail in Laos and Cambodia. That accounted for about one thousand five hundred tracts per capita.

The Vietnamese conflict was also the theatre of intense wavelength warfare. In order to face *Radio Freedom*, the radio propaganda tool established by the Viet Cong, Americans organized jamming actions as well as black propaganda manoeuvre, by broadcasting, on the same wavelength, information supposed to be issued from North Vietnam. Generally, and in spite of a few local successes, the use of PSYOPS in Vietnam was judged by many observers of the time as largely lacking, because it was much too fragmented and most often limited to the tactical field.

The American authorities were quickly caught at their own game. Refusing to impose on the media a censorship that would have made them unhappy and would have created a climate of suspicion, they delegated the entirety of official information to the JUSPAO,⁵⁰ which was overwhelmed by the extraordinary emotional impact of televised images reported by American war correspondents. For the first time, the public witnessed in disbelief the destruction and slaughter following the bombings, ravages of napalm, and the death of their boys, gone to fight thousands of miles away from their families, for a war that would soon no longer be theirs. The swing in public opinion truly happened after the Tet offensive of January 9, 1968. In that sense, the Vietnam War constituted for the US a very heavy psychological defeat, symbolized by its leaving the country in April 1975 amidst the chaos of the fall of Saigon.

A commentator later said: “We tried to win the hearts and spirits of various ethnic groups in Vietnam, Laos, and Cambodia. During that time, our adversary had understood that he needed only to arouse the spirits and passions of politicians, students, editors, and TV producers in Europe and the United States.”

3.7.4. Contemporary Middle East

The Vietnam experience provoked real trauma within the American Land Forces, which were then highly reorganized. For almost ten years, specialization experienced a lengthy decline in the United States. However, the early 1980s marked a total change in strategy. In 1983 in Fort Bragg, a 1st Special Operations

⁵⁰Joint US Public Affairs Office.

Command (SOCOM), merging Special Forces, Rangers, Civil Affairs and PSYOPS, was created. In 1984, the new military doctrine, called “Weinberger” — after the Secretary of State for the Defense — listed six criteria defining the conditions under which the use of American Land Force was justified, including “reasonable assurance that American troops would receive the support of both Congress and public opinion,” knowing that if this support did not exist *a priori*, it would be essential to instigate it. The time for psychological operations had returned.

After the intervention in Grenada — an undeniable success despite a poorly received early-hour informational black-out — the 1991 Gulf War was, in many aspects, the most exemplary case of IO use in a theatre of operations, as was theorized by American decision-makers during the whole second half of the 1980s. What mainly caught observers’ attention at the time was the formidable “mind conditioning” of Western media and public opinion by the American Land Forces. Thanks to the reinforcement of what we must call military censorship, and the psychological exploitation of the first air strikes (often wrongly called “surgical”) — a remarkable setting of violence through the prism of television and newspapers — the militaries managed to control the informational domain almost completely.

Somalia, Haiti, and Bosnia Remained Anecdotal.

Then came “9/11”. Undoubtedly the September 11, 2001 attacks on the World Trade Center in New York and on the Pentagon in Washington were a terrifying but genuine psychological warfare operation and formed a rupture from the context of the 1990s. They showed the end of a certain form of asymmetry between the United States and the rest of the world in matters of information warfare. From then on, thanks to the terrific progress made in a few years by communication and information technologies (miniaturization, increased development of the Internet, etc.), amorphous terrorist groups have been able to defeat, on its own ground, the leading world military and industrial power.

4. Geographical Background

The purpose of this chapter is to explore the works executed around the world — mainly in NATO countries — that reflect on the subject of Information Operations.

Of course, sources are varied and uneven. However, it is interesting to note common points in structures of approach as well as in defects. Overly fond of theorizing and confining IOs within a framework, certainly facilitating reflection, the authors of these doctrines, from all countries put together, have a strong tendency to entrench the context within a military framework and to forget the human component of perception and cognition.

The classic format appears to be articulated around the following framework:

- Definition;
- Objectives and Principles;
- Context and Interoperability;
- Responsibilities and Means;
- Planning; and
- Instruction and Training.

It must also be noted that historical and/or cultural backgrounds allow us to differentiate and define three separate groups:

- The United States and the countries that copy its doctrine almost word for word;
- Countries from the former Eastern Bloc that appear distrustful of use of propaganda, and aim their effort at the material aspect (Electronic, Cybernetic and Network Warfare); and
- Countries that attempt an original approach.

4.1. NATO

The January 2006 AJP 3.10 has been replaced by the November 2009 version, which is the background paper. Its 82 pages lay the foundations for modern Information Operations. Principles and definitions, coordination, planning and training can be found therein.

2006 Version: “Coordinated actions with a view to producing desired effects on the will, understanding and capability of an adversary (and other approved parties) in support of overall Alliance objectives by affecting their information, information-based procedures and systems while exploiting and protecting one’s own.”

2009 Version: “Is a military function to issue recommendations and to coordinate military information activities with the aim of creating desired effects on the will, understanding and capabilities of adversaries, potential adversaries, and other NAC-approved parties, in support of Alliance mission objectives. Information activities are actions executed with the aim of affecting information and/or information systems. They can be performed by any actor and include protection measures.”

The concept and the definition proceed from the paramount principal that the effectiveness of a decision-maker is a function of his will, his understanding, and his capabilities. The new definition

extends the concept and introduces the crucial notion of coordination.

Planning and conducting IOs obey some principles:

- Direction and direct participation of the theatre commander;
- Sequencing and “tight” coordination;
- Accurate information and intelligence;
- Centralized planning and decentralized execution;
- Targeting;
- Quick engagement and preparation; and
- Tracking, measuring and interpretation of effects.

The three main fields of activity are:

- Influence, which acts against the enemy’s will;
- Activities of counter-command, which act against his capabilities; and
- Actions of information protection, which affect the adversary’s understanding.

However, there are no clear boundaries between these three different fields. This leads to the absolute need for effective coordination.

The available tools are:

- Psychological Operations;
- Presence, Posture, and Profile;
- Operational Security;
- Information Security;
- Deception;
- Electronic warfare;
- Physical Destruction; and
- Computer Network Warfare.

And the peripheral activities are:

- Public Information; and
- Civil-Military Co-operation.

Recently introduced in the 2009 version is the “key actors’ engagement”, a recent concept that aims at establishing a flow chart of influence and decision networks, and ensuring their benevolence.

At the strategic level, a military committee determines the objectives. From there, the themes, limitations, and the impact of the rules of engagement are established. At the operational level, the staff identifies the operational objectives, establish priorities, allocate resources, advise the strategic level, and guide the tactical level.

Background papers:

“Allied Joint Doctrine for Information Operations”, AJP-3.10

“Allied Joint Doctrine for Psychological Operations”, AJP-3.10 (A)

4.2. The United States

The United States Armed Forces are probably the most advanced in the reflection and articulation of Information Operations on a national level. There are, however, some hesitation, incoherencies and failings that must be noted. But at least the North American way boasts the merits of will and an effort of reflection, probably due to the critical mass of population because, as everywhere else, effort is essentially generated by a small group of convinced and informed officers who spare no effort to persuade the high command of the validity of IOs.

Because of the American Forces’ structure, each component has conducted its reflection individually, and from its own perspective. Three documents distinguish themselves by the quality and originality of their reflection: the older Marines Corps’ (USMC) (2001), the Air Force’s (USAF), and the 2006 allied doctrine, a background paper.

Joint Doctrine

By far the most accomplished and universally known document is “JP 3-13”. Dated February 13, 2006, it reprises, in its 119 pages, NATO’s AJP 3.10, and describe in detail and meticulously the ins and outs of Information Operations.

“Information Operations (IO) is described as the integrated use of Electronic Warfare, Computer Network Operations, Psychological Operations, Military Deception (ruse), and Security Operations, along with specific support and related functionalities, to influence, disrupt, corrupt or seize the adversary’s human or automated decision-making, while protecting our own.”

From the introductory page, the tone is set. We are in an offensive context. IOs have not left the military framework and are centred on the enemy or adversary. All the quality of reflection will not stop the omission of entire sections of IOs.

IOs consist of five basic capabilities:

- Psychological Operations (PSYOPS);
- Deception Operations (MILDEC);
- Operations Security (OPSEC);
- Electronic Warfare (EW); and
- Computer Network Operations (CNO).

They work closely with Public Affairs (PA) and Civil-Military Operations (CMO) but are in no way under the same command. It is clearly stated that PA and CMO, while they must be coordinated with IOs, cannot risk being “compromised” by the latter. This is the striking confession of confinement of IO within a framework that is offensive, greyish if not totally black, and probably a little twisted. In any

case, a good reason to be “compromising.”

Background papers:

- “*Joint Doctrine for Information Operations*”, Joint Pub 3-13, Joint Chiefs of Staff, USA, 09.10.98, available at http://www.dtic.mil/doctrine/jel/new_pubs/jp3_13.pdf
- *Revised JP 3-13, Joint Doctrine for Information Operations* — second draft, 14.12.04, available at http://www.dtic.mil/doctrine/jel/ddrraafft_pubs/3_13sd.pdf
- *Field Manual No. 3-13 (FM 3-13): “Information Operations: Doctrine, Tactics, Techniques, and Procedures,”* November 2003, US Army, available at http://www.adtdl.army.mil/cgi-bin/atdl.dll/fm/3-13/fm3_13.pdf
- *Air Force Doctrine Document 2-5: “Information Operations,”* 04.01.02, available at <http://www.e-publishing.af.mil/pubfiles/afdc/dd/afdd2-5/afdd2-5.pdf>
- “*National Military Strategy of the United States of America 2004,*” 13.05.04, available at https://www.ccmr.org/public/library_details.cfm?library_id=5178
- *JP 1: “Joint Warfare of the Armed Forces of the United States,”* Nov 14, 2000, available at http://www.dtic.mil/doctrine/jel/new_pubs/jp1.pdf
- *JP 3-0: “Doctrine for Joint Operations,”* Sep 10, 2001, available at http://www.dtic.mil/doctrine/jel/new_pubs/jp3_0.pdf
- *JP 3-53: “Psychological Operations,”* Sep 5, 2003, available at http://www.dtic.mil/doctrine/jel/new_pubs/jp3_53.pdf
- *Field Manual No. 3-0 (FM 3-0): “Operations,”* June 2001, available at <http://www.adtdl.army.mil/cgi-bin/atdl.dll/fm/3-0/toc.htm>
- *Air Force Doctrine Document 1: “Air Force Basic Doctrine,”* Nov 17, 2003, available at <http://www.e-publishing.af.mil/pubfiles/afdc/dd/afdd1/afdd1.pdf>
- “*Joint Information Operations Planning Handbook,*” July 2003, available at http://www.jfsc.ndu.edu/schools_programs/jciws/iw/io_handbook.pdf

4.3. England

The background paper, the British Army’s IO doctrine, is *Joint Warfare Publication (JWP) 3-80*.

The definition of IOs therein is the following:

“Co-ordinated actions undertaken to influence an adversary or potential adversary in support of political and military objectives, by undermining his will, cohesion and decision-making ability, by acting on his information, and his procedures and systems of information, while protecting one’s own decision-makers and decision-making processes.”

IOs aim mainly at the will and capabilities of the adversary (undermining), of allies (protection), and of neutrals (persuasion and protection).

The British very intelligently make a distinction between activities and tools.

Activities are limited to:

- Influence Actions;

- Counter-Command Actions;
- Information Actions;
- Media (and related) Actions; and
- Civil-Military (and related) Actions.

Tools are:

- Psychological Operations;
- Presence, Posture, and Profile;
- Operational Security;
- Military Deception;
- Electronic Warfare;
- Physical Destruction;
- Emerging Technologies; and
- Computer Network Operations.

Background papers:

- *Information Operations: Joint Warfare Publication 3-80, Joint Doctrine and Concepts Centre (JDCC), June 2002.*
- *United Kingdom Doctrine for Joint and Multinational Operations, Joint Warfare Publication 0-10, Joint Doctrine and Concepts Centre (JDCC), January 2002.*
- *Joint Operations, Joint Warfare Publication 3-0, Joint Doctrine and Concepts Centre (JDCC), July 2001.*
- *Media Operations, Joint Warfare Publication 3-45, Joint Doctrine and Concepts Centre (JDCC), November 2001.*
- *Deception, Joint Doctrine pamphlet (JDP) 2/98, 1998.*
- *OPSEC, Joint Doctrine pamphlet (JDP) 3/98, 1998.*

4.4. Australia

Australia prefers the term “Information Actions” to the term “Information Operations”.

A member of ABCA,⁵¹ Australia joined the IO Joint doctrine in 2002. The publication of a new US doctrine in 2006 could have led us to believe Australia would follow suit, which has not been the case so far. Only the land force was equipped with its own IO doctrine in 2006.

Recent experiences in Iraq have forced doctrinaires to revise their proposals. It was recommended to do away with the term “Information Operation”, but to keep “Influence Activity”. It was recognized that influence emanates from all military activities, intentional or not.

The Australian joint definition of IOs is:

“The coordination of information effects to influence the decision-making and actions of a target audience, and to protect and enhance our own decision-making and actions in support of national

⁵¹American, British, Canadian and Australian.

interests.”⁵²

Lately, the land force, intending to replace “Information Operation” with “Information Action”, suggested the following definition:

“Actions conducted to influence a target audience with the aim of generating understanding, acceptance, and support of our actions and objectives, as well as to diminish the quality and speed of the adversary’s decision-making, while maintaining our own, to achieve decisional superiority.”

IOs include the integration of:

- Deception;
- Psychological Operations;
- Electronic Warfare;
- Operational Security; and
- Computer Network Operations.

With supporting:

- Physical Attacks;
- Informational Security;
- Public Information; and
- Civil-military Co-operation.

The main categories of actions considered are:

- Influence Actions;
- Counter-Command Actions; and
- Information and Command Protection.

Australians quickly realized one weakness, even defeat, in the area of influence. In addition, the will to make the tactical level feel accountable created a break in the cohesion with the operational and strategic levels. In spite of the fact that we can see some effort in understanding the notion of influence, the obsession with “systems of systems” has generated a neglect of human factors.

4.5. Israel

While Israel adopted American doctrine, its centres of interest were more specifically defined around counterterrorism and cybernetic actions.

The IO definition proposed by Ivan Goldenberg was classic:

“The offensive and defensive use of information and information systems to deny, exploit, corrupt, or destroy an adversary’s information, information processes, information systems, and computer networks while protecting one’s own.”⁵³

The events of the last ten years have stressed countermeasures and protection of data and systems. A

⁵²Major James Nicholas. “Current Developments in Australian Army Information Operations,” *IO Sphere* (Sep 2008).

⁵³Tomer Ben-Ari. “Israel: Information Operations Threats and Countermeasures”, *IO Sphere* (Sep 2008).

National Data Protection Authority was created, which reports to Shabak (National Security), and recently edited a doctrine to protect national data, including:

- Information Mapping;
- Study of Human Factors;
- Information Protection;
- Physical Protection;
- Disaster Reaction Plan; and
- Network Security.

Very sensitive to cybernetic terrorism, Israel deploys a considerable effort in detecting and controlling terrorist Web sites, identifying IP addresses, monitoring communications via Internet, and developing adequate legislation.

4.6. Russia

Russian doctrinaires pondered the definition of an “information weapon”. This effort of reflection dealt with the control of information weapons proliferation, the means to control them, and especially the means to counter them, particularly in the field of cyber-terrorism.

They noted a change of context, essentially characterized by:

- An acceleration of scientific and technical advances;
- Opportunities to disseminate ideas and knowledge;
- A better understanding of various aspects of the world in which we live;
- An intensification of global, political, economic, and informational integration;
- The creation of structures devoted to developing national and regional security; and
- Advances in the field of international relations.

At the same time, we are witnessing:

- A polarization of the world; and
- An increased number of “marginal” countries that are sources of instability.

The focus is set on the technological aspect, and its use in the area of terrorist threat. The introduction of new technologies that allow quick processing of the volume of information requested by decision-makers increases combat capabilities in many fields. It is clear that Information Warfare is not a virtual game but a tangible tool that leads to political and military victory.

In the near future, political and informational parameters of “soft power” will replace those older nuclear ones. However, no country can expect to win the information battle on its own. Therefore, there is an acute need for international co-operation. Unfortunately, international negotiations stumble over the difficulty of defining the aim, as well as the terms of these negotiations. Hence the need for a common reference framework. Russia advocates the creation of an international convention on Information

Security, to prevent the proliferation of information weapons and to control their use.⁵⁴

Understandably, Russian doctrinaires seem to focus more on the container than the contents. A deep reflection has been initiated on the technological aspects. Little exists or has transpired with respect to ideas.

4.7. Bulgaria

Bulgaria is clearly registered in a NATO context and serves to provide a generic IO capability within the framework of international missions. The focus is on the field of infrastructure protection.

The core competency in the IO field stemmed from the initiative of a few curious officers who, in the mid-1990s, decided to study the development of Information Warfare. This is a well-known story, and one that is strangely similar to that of other countries.

The Bulgarian perspective relied on the acknowledgement of the extraordinary use of IOs by Americans during the First Gulf War. This set IOs high among research subjects. In 1992, several Bulgarian researchers, Shalamanov, Tagarev and Mihov, jointly published "Information Aspects of Security". They defined the term "Information Power" as being the capability created by technological advances, procedures and organizations. They differentiated two levels of information campaign: (1) strategic information campaign; and (2) command and control campaign.

According to Shalamanov and Tagarev, attaining Informational superiority goes through six components:

- Operation Securement;
- Ruse and Deception;
- Psychological Operations;
- Electronic Warfare;
- Application of kinetic effects on the adversary's command systems; and
- Amalgamation of all sources of information to achieve the best level of situational knowledge.

The suggested definition for Information Operations is the following:

"A system of actions undertaken to create an informational space, in which one side obtains superiority in the understanding and use of the political, economic, military, ecological, social, and cultural strengths and weaknesses of a potential enemy, while denying him the same."

The aim was: changing the mode of reasoning and decision-making of the enemy in a direction favourable to our interests.

In 2001, a joint doctrine defined the IO components:

- Defensive: Systems Protection;

⁵⁴Dr. Vitaliy Tsygichko. "The Information Revolution and Information Security Problems in Russia", *IO Sphere* (Sep 2008).

- Active: Influence, Damage and Destroy;
- Operations Security;
- Disinformation; and
- Electronic Warfare.

The 2002 *Air Force Doctrine* delineated between “subordinate” and “supporting” operations. The *Land Force Doctrine* included a requirement for special forces to be trained in Psychological Operations.⁵⁵ In 2003, Colonel Mitko Stoykov published a reference work on the significance of the information revolution for terrorism. His chapter on IOs is nearly exclusively based on the joint US doctrine, the famous about *JP 3-13*. This book is the most recent on the topic by a Bulgarian author.

Since then, the focus has been mainly on counterterrorism, the fight against organized crime, and the protection of sensitive infrastructures. The reduction in size to which the Bulgarian army was subjected in the early 2000s did not allow for the implementation of the plans recommended by Shalamanov, Tagarev, and Mihov. Budgetary war has been raging for the last five years. In addition, Bulgaria finds it difficult to define its field of competence within NATO. In that context, IOs are seeking support, and reflections on their topic are not encouraged.

4.8. Ukraine

Along with a number of old satellites, competencies in the use of information disappeared with the USSR. Consequently, researchers and doctrinaires have had, just like many others, to “reinvent the wheel”.

The Ukraine gives IOs an original definition:

“Information Operations are the achievement of non-information goals (social, economic, military, and political) using information techniques.”⁵⁶

Amongst these techniques is mainly mentioned the production of non-mass messages, such as rumours, and a predilection for direct contacts, as opposed to mass contacts that are not considered very trustworthy. There are two main features of information techniques: (1) they are directed towards the transmission of information from one level to another; and (2) they mimic the natural flow of information.

IOs are divided into defensive and offensive. Defensive capabilities have developed more dramatically these last few years, because of events such as the natural gas conflict, the emergence of totalitarian religious cults such as the “White Brotherhood”, or the Orange Revolution. The latter allowed us to draw a number of tactical-level lessons:

- The more successful the “narrative”, the more the new events connected with it will be readily acceptable;
- A good narrative prevails over ambivalent facts; and
- A motivating narrative is written from the citizens’ perspective.

⁵⁵Dr. Todor Tagarev. “The Rise and Decline of Bulgaria’s Interest in Information Operations”, *IO Sphere* (Sep 2008).

⁵⁶Dr. Georgii Pocheptsov. “Ukraine: Information Operations in Countries of the Former Soviet Union”, *IO Sphere* (Sep 2008).

In 2006, an effort was made in IO communication and theorization, by the publication of an inter-agency work: "Ukraine: The Art of Future Information Warfare."

Although the emphasis is on cybernetic terrorism warfare, as in other Central European republics, we can still notice a considerable effort on the part of the Ukraine to reflect on the contents, even if it is still constrained at the tactical level.

4.9. Germany

Germany is the Multinational Information Operations Experiment — MNIOE) leader within the framework of Multinational Experiment 5 (MNE 5).

To this end we will refer to the documents related to this initiative, in particular:

- *The Military Information Operations Function within a Comprehensive and Effect-Based Approach*, July 11, 2008.
- *"The Information Factor within a Comprehensive Approach to Multinational Crisis Management,"* September 5, 2008.

The proposed definitions are the following:

- "Information Operations are a military function directed towards providing advice and coordination on the level of activities relating to information and information systems, including behaviours and capabilities, with a view to producing the desired effects."
- "Information activities are a set of actions directed at producing an effect on information and/or information systems. They can be executed by any actor, and can include protection measures."

Information Operations aim at decision-makers' will, understanding, and capability. Thus, the advice and coordination provided by IOs aim to integrate military information activities with the goal of influencing the enemy's will and understanding, affecting his capabilities, exploiting information and information systems, protecting one's own information and information systems, and countering the adversary's information activities.

Included in Information Operations are:

- Psychological Operations;
- Electronic Warfare;
- Computer Network Operations;
- Operational Security;
- Military Public Affairs;
- Civil-military Co-operation;
- Internal Information;
- Special Forces;
- Presence, Posture and Profile;
- Military Deception;

- Physical Destruction; and
- Counter-Intelligence.

Supporting Information Operations are:

- Operations on Networks;
- Intelligence;
- Command and Control;
- Knowledge Management;
- Multinational sharing of information; and
- Inter-Agency Coordination.

At the operational level, understanding the tasks to be executed in order to obtain the required capabilities makes it possible to confine reflection to four main points:

- Identifying and prioritizing, at the operational level and in the informational arena, the effects needed to reach the set objectives;
- Bringing directives and providing subordinates with the resources needed to execute their tasks;
- Providing command with the advice required to obtain the desired effects within the informational environment, with a view to reaching the objectives set in the strategic directives; and
- Providing, at the tactical level, the advice required to generate the desired effects as described in the operation orders.

It may all seem pompous and a little heavy, but it has the virtue of being detailed and exhaustive. It encompasses all three levels of command with many details, and explores often-ignored domains such as legal aspects and training.

Background papers:

- *“Teilkonzeption Informations Operationen der Bundeswehr (TK InfoOpBw)” (Subconcept Information Operations of the Bundeswehr)*, February 2005, Ministry of Defence.
- *“Teilkonzeption Operative Information der Bundeswehr (TK OpInfoBw)” (Subconcept Psychological Operations of the Bundeswehr)*, March 2002, Ministry of Defence.
- *“Verteidigungspolitische Richtlinien, (Defence Policy Guidelines)”* May 21, 2003, available at http://www.bmvg.de/misc/pdf/sicherheit/030521_VPR-english.pdf in English⁷
- *Konzeption der Bundeswehr (Concept of the Bundeswehr)*, August 9, 2004, Ministry of Defence.
- *“Information Operations (Info Ops) in Future Coalition Operations,” Version 1.0, 4*, October 2004.
- *CONOPS Information Operations (Info Ops) Planning for Effects-Based Operations, Version 1.0, 4*, October 2004.

4.10. France

During the previous chapter’s historical overview, the reader will have noticed that, through its colonial adventure and the painful episodes of Indochina and Algeria, France sets itself apart in the evolution of Information Operations. Colonial wars compelled us to consider a different approach. Indochina was

the first shock of revolutionary war. It gave us the greatest counter-insurgency and psychological warfare theorists: Lacheroy, Hogard, Némó, Galula, and Trinquier. Algeria experienced an effective application of these theories. But the French officers lost their souls in the process. The wounds were deep. One need only open French newspapers to realize that they are still bleeding today. This cannot be without consequences, and they are heavy. Beyond the aforementioned atavistic aversion of the “traditional” military man for indirect and non-kinetic operations, the weight is added of a past we want to ignore, if not forget. Consequently, terms such as, for example, “psychological operation” are banished from the vocabulary. In 2005, after deliberations and much procrastination, and under pressure from a group of enlightened officers, the staff finally resolved to create a psychological warfare capability called Military Influence Operations (MIO). The problem was that, as we observed, Influence Operation and Psychological Operation are two exact and distinct things. Therefore, when a French officer refers to a Psychological Operation as a Military Influence Operation, he is only adding to the ambient confusion.

Information Operations (IO)

In May 2006, the Armies’ Staff published the “Information Operations Joint Doctrine”. The definition is: “Information Operations (IO) comprise the set of actions conducted by the armed forces, led and coordinated at the highest level, aiming at using or defending information, information systems, and decision-making processes, to support a strategy of influence and to contribute, within the framework of operations, to the attainment of the desired end state, while respecting the defended values.”

Information Operations have three objectives:

- Guaranteeing freedom of action — Freedom of action depends notably on the ability to maintain decisional superiority and the capability of informing. The first entails protecting and defending one’s information systems and decision-making processes while acting against those of the adversary; the second requires occupying the field of information, to guarantee the credibility of the force, and to persuade.
- Exercising influence — Unlike physical constraint, persuasion seeks voluntary agreement and consent. Its effects are much more enduring and much better tolerated. Information is the lever of mechanisms for emerging from a crisis, because for its duration, it urges opinions and actors to awareness. It is the main vector of a strategy of influence aimed at promoting the values extolled by France.
- Legitimizing the forces’ action — Public opinion is thenceforth systematically a stakeholder in the management of crises. Knowing exactly how to exploit the power of the media, potential opponents of our armed forces’ action significantly threaten our operations. In the race for legitimacy and influence, it is advisable to take into account these potential opponents and try to make them at best allies, at least neutrals, while persuading public opinion of the validity of the operation.

Relying on seven principles:

- Coherence — From the outside, forces are seen as an indivisible whole in the service of the State or coalition that commissioned them.
- Credibility — The image of the force and the messages delivered must remain credible. One must advance with the greatest caution in the use and mixture of sensitive processes such as deception or ruse.
- Pertinence — Persuading implies a level of relevance that can be reached only through an intimate knowledge of the target entity’s environment, culture, and thinking.
- Multidisciplinarity — Full effectiveness of Information Operations is achieved by choosing the best adapted means on a case-by-case basis, and by harmoniously combining a set of actions in time.
- Subsidiarity — The choice of multiple and decentralized actions requires the adoption of the principle of subsidiarity towards the subordinate levels.
- Deontology — Whatever the circumstances, courses of action retained in Information Operations must match defended values. The end cannot justify the means if the means do not comply with ethical rules.
- Evaluation — The conduct of Information Operations requires both prior assessment of expected effects and the most accurate measure possible after events.

It is specified that Information Operations have no call to manage input or output flow. On the other hand, they are meant to protect those flows from external actions. Although Information Operations are recognized as potentially targeting all actors in the theatre, the focus is on “sources of opposition”. The voluntary/involuntary procedures are selected according to receivers, application points, or even info-targets.

IO cells are responsible for the coordination and coherence of actions in the information domain, but no unit or function is their subordinate. Information Operations are divided into three types:

- Influence Actions (which we will examine in more detail in the following chapters);
- Protection Actions; and
- Counter-C₄I (Counter-Command, Control, Computer and Intelligence) Actions.

The functions linked to Information Operations are the following:

- Knowledge Acquisition and Management Function
- Information-dedicated Functions
 - Operational Communication (Media, Internal Communication, Network Communication)
 - Military Influence Operations
- Technical Functions
 - Electronic Warfare
 - Cyberwar
 - Operations Security

- Non-specialized Functions
 - Civil-military Co-operation (CIMIC)
 - Liaison
 - Special Forces
 - Coercive Measures

The thirty-six-page document reviews all the following aspects:

- Organization and Responsibility at three levels of command;
- Analysis and Planning;
- Execution and Verification; and
- Training and Preparation.

Military Influence Operations (MIO)

In March 2008 the Armies' Staff published a "Military Influence Operations Joint Doctrine." Its definition is: "Military Influence Operations (MIO) combines all the activities the objective of which is to influence the behaviour of individuals, groups, or organizations (info-targets), to contribute to achieving political and military aims. They are characterized by the will of effective action against others, by means that do not necessarily call for use of force or exercise of authority. A function coordinated by Information Operations (IO), MIOs make use of media, specific to land forces or not. They achieve actions designed mostly at the strategic or operational level. They deliver credible messages or signals, adapted to cultural and linguistic specificities of info-targets." It should be noted that the NATO equivalent of MIOs are PSYOPS. Aimed at influencing the perceptions, representations and attitudes of info-targets (opposing, undecided, or local ally), to lead them to act in a way favourable to the mission, MIOs are divided into three categories:

- Strategic MIOs (SMIOs);
- Combat MIOs (CMIOs); and
- Stabilization and Reconstruction MIOs (SRMIOs).

This 51-page document shows more maturity in the understanding of non-kinetic operations than the prior document, the IO doctrine, of two years earlier. It discusses in detail the fields of responsibility and the principles for use, as well as interoperational relationships. The methods described therein are detailed: info-target analyses, MIO planning, means and support. To be noted: "Without exception, these operations play a major role in asymmetric or human-intensive conflicts (stabilization, reconstruction, counter-guerrilla operations...)."

Background paper:

PIA 03.152. *Concept interarmées des opérations d'information*, No. 294/DEF/EMA/EMP.1/NP, March 11, 2005.

4.11. India

A civilization many millennia old, India has no difficulty finding, in its history and mythology, the deep roots of the use of information. In the Mahabharata, Krishna wrongly announces Ashwatthama's death

with drums, confuses his enemies, and achieves victory. Today, faced with multiple internal and external problems, India sees IOs as the fifth integral dimension of warfare.

Just as other actors, India collides with terminology-related difficulties. The proposed terms and definitions are the following:

- Information Operations: “Actions conducted against the adversary’s information and its systems, while defending one’s own information and systems.”
- Information Warfare: “Actions conducted during any form of conflict to gain Informational superiority over the adversary by negatively influencing his information and its systems, while protecting one’s own.”
- Information Assurance: “Information Operations that aim at protecting and defending information and information systems while guaranteeing their availability, integrity, authenticity, confidentiality, and acceptance. These include protection, detection and response.”
- Informational Superiority: “Status reached when a competitive advantage is gained from exploiting a favourable informational position.”

The stated information warfare objectives are:

- the creation and maintenance of databases;
- the protection of information;
- influence on the adversary’s perceptions;
- influence on neutrals and non-combatants;
- the protection of decision-making systems; and
- the degradation of the adversary’s information systems.

Information warfare can take the following forms:

- Command and Control Warfare;
- Electronic Warfare;
- Cybernetic Warfare;
- Network-Centric Warfare;
- Intelligence-Based Warfare;
- Psychological Warfare; or
- Economic Warfare.⁵⁷

Although this approach is fairly close to those of Western countries, two major differences are noteworthy: the integration of Economic Warfare and the importance given to the contents throughout Psychological Warfare.

⁵⁷General Sapan Kumar Chatterji. “An Overview of Information Operations in the Indian Army,” *IO Sphere* (Sep 2008).

The Psychological Warfare aspect is strongly developed and is available at all three levels: strategic, operational, and tactical. Its objectives are clearly defined: creating doubt, dissidence and dissatisfaction among the adversary, strengthening the support of allies, and helping to resolve conflicts. It integrates civil-military actions as well as public information.

The integration of Economic Information Warfare is the major difference in the Indian approach. Its management is exclusively at the strategic level. It is linked to Intelligence-Based Warfare.

4.12. China

The definition of IOs in the People's Republic of China has evolved dramatically over the last ten years. We will mention two main theorists, Yuan Banggen and Dai Qingmin.

According to Yuan Banggen, who published in 1999, IOs are specific operations of Information Warfare. This definition is quite broad but military-centric. There are two levels: basic and applied. The basic theory consists of concepts such as structural organization, command and control, and technological equipment. Applied theory is subdivided into offensive and defensive IOs, strategic, operational, and tactical levels, in wartime or peacetime. The two IO missions are preparation and execution. As a rule, Yuan Banggen felt that all activities related to IOs focus their attention on command and control.

In 2005, Dai Qingmin published a "Study Guide for Information Operations Theory". He lists four IO definitions:

- Information Operations refer to operations implemented to acquire and maintain information control.
- Information Operations refer to a series of operations, implemented by both sides of a conflict, in which the enemy's information systems are used or destroyed, and one's own information systems are protected in order to acquire, control and utilize information.
- Information Operations refer to a series of operational actions undertaken in order to acquire and maintain informational superiority on the battlefield, or information control.
- Information Operations are defined as being a series of countermeasures taken by both sides in a conflict, in which information, or arms and equipment controlled by information and dedicated to the destruction of information systems, are used to influence and destroy the enemy's information, information systems, knowledge and beliefs, while preventing the influence and destruction by the enemy of one's own information, information systems, knowledge and beliefs.

We can see that all these definitions, as different as they may be, are very military-centric and form a large part of countermeasures. This seems to be characteristic of the Chinese approach to IOs. Another characteristic is IO integration at the strategic level, as widely recommended in Peng Guangqian's and Yao Youzhi's "The Science of Military Strategy".

4.13. Synthesis

When we study documents relating to the IO doctrines of different countries or organizations, it is

important to consider their publication date. It seems that three great periods distinguish themselves:

Before 2000: The reflections leading to the documents published at that time were mostly based on individual and purely national considerations. The oldest document available is the 1996 *US Army Field Manual 100-6*.

2000 to 2002: Most of the documents published at that time were based on *US Joint Publication JP 3-13* and NATO's *MC 422*. All were written before September 11, 2001. Therefore, they do not take into account the emergence of war against terrorism.

After 2002: All the documents published in 2003 and thereafter reflect the political and military environment in the aftermath of the 9-11 attacks. Co-operation and coherence efforts can be noted.

The doctrines that govern IOs throughout the world reflect an evolution of doctrinal thought since the mid-1990s. A paradigm shift in the role and responsibilities of IOs can be noted. While the show of force of the most powerful armies on the planet were not yielding any concrete results, all eyes were increasingly set on IOs as being, if not the solution, at least the cornerstone for solving the problem. Despite the still flagrant problems of understanding and adaptation, it is obvious that the tendency was towards the integration, coordination and synchronization of IOs with other military or non-military functions. The differences seen in the oldest documents tend to get blurred today as actors increasingly agree with the roles and definitions, even if there is still much to do. The definition of IOs' role still throws people into confusion; is it a forum for coordination of functions, or a full actor, managing capabilities in order to reach defined strategic objectives?

We can logically assume IO use will increase in humanitarian and peacekeeping operations, and hope that this tendency acts as a catalyst for expansion of an international effort leading to a better understanding and a common approach in the conduct of IOs.

5. Commercial Context

Whether civilian or military, humans are the product of the same principles. They are led, if not forced, to make choices. We are constantly faced with doors the keys to which are nothing but simple decisions, made all the more difficult by the door's opacity and because what is on the other side could generate terrifying consequences. Whether choosing a consumer product or engaging a division in the North, although the consequences are different, the principle is the same. The way we analyse information to make a choice will always be a debate between emotion and reason, and we will always be influenced by a countless variety of factors.

5.1. Marketing

Business marketing professionals have well understood it, analysed it, and use it daily for marketing purposes. Specializations were defined over time, such as direct marketing, corporate communication, publicity, and brand management or "branding".

While yesterday's happy consumer could still believe that the bikini-clad pin-up would be delivered with the car, today's informed consumer requires a much more sophisticated approach. Negative experiences, caution, and the opportunity to communicate and share with the whole wide world, have made the consumer a lot tougher and more resilient to advertisers' techniques. This has led marketing and communication professionals to develop sometimes very sophisticated methods and approaches, such as influence strategies and indirect communication.

Several years ago at the Canadian Forces College, while I was tackling the IO chapter with my Joint Command and Staff Programme students and was describing its planning matrix, three of them, each of whom held an MBA, asked me: "But Colonel, what you are describing is in fact a marketing campaign... Let us handle it; it's our field of expertise." Is it necessary to point out that their work was remarkable?

In this chapter we propose to study the parallels and bridges between the civilian and military worlds, and between marketing and IO communicators.

Making Choices

The trade of the marketing professional is to see to it that:

- the consumer knows that the marketer's product exists;
- the consumer is aware of the need (indispensability, if possible) that he has for the marketer's product; and
- the consumer, at the moment of purchase, chooses the marketer's product over his competitor's.

First, he must devise a strategy. What are his resources? What is his market? What is/are his objective(s)? Who are his competitors? What synergies should he employ?

He must then define the competitive edge to develop in order to win the consumer over at the moment of purchase. The buying act being the fruit of a decision process, the marketer must understand the

mechanisms of this process in order to influence it. It is therefore imperative for him to understand the progression of data to information to knowledge that will lead to the buying act. Data are transformed into information, then into knowledge, according to affective or cognitive factors, in an emotional or reasoning space. Knowing these factors makes them usable to influence the consumer's decision sequence.

Let us now change theatres. Let us move from the context of the economic market to that of a conflict: A conflict, understood in the broad sense, with the entire set of its direct or indirect actors. And let us make two major assumptions: (1) War is two wills in conflict;⁵⁸ and (2) Any action is the product of a decision.⁵⁹ Well, "a decision is far from being the result of a logical reflection that weighs the pros and cons. It would be, rather, the product of a perception of self and of the world, shaped by our emotions."⁶⁰

Just as business leaders and marketing professionals, so do political leaders and warlords want to bring individuals and/or groups of individuals to make a set of decisions in line with their will. In a commercial context, war would be the imposition, by brute force, of the act of buying. Fortunately, legislation prevents this. In the world of warfare, marketing is called Information Operations. And legislation does not prevent that.

Let us now turn our attention to what Frederick E. Webster⁶¹ tells us about the best way to manage client-centred marketing, and let us establish a parallel with IOs:

- *Focus the Whole Organization's Attention on the Client.* Undoubtedly, during the conduct of war, the attention of all of the State authorities, and in particular of Defence and the armed forces, must be totally focused on the adversary and on the affected populations. enemy, neutral and friendly. Ignoring this would be a grave mistake, one committed all too often. "However absorbed a commander may be in the development of his own ideas, it is sometimes necessary to take the enemy into account."⁶²
- *Listen to the Client.* "In this context of half-war half-peace, knowing is no longer enough; understanding is called for."⁶³ And for that, interaction is necessary, not only in one's intelligence-gathering, but in one's "intelligent" interpretation in order to support the decision-making process.
- *Define and Maintain the Competitive Edge.* Populations and the government bodies that lead them will be forced to make choices of allegiance or resistance. These choices will be based on perceptions of values and stakes that the "cause" represents. The advocated or imposed cause must show a noticeable competitive advantage to get people to accept it and subscribe to it.
- *Define Marketing as Market Intelligence.* And define IOs as a form of intelligence warfare.

⁵⁸ Carl von Clausewitz. *On War* (Princeton, New Jersey: Princeton University Press, 1976).

⁵⁹ Alain Berthoz. *La Décision* (Paris: Odile Jacob, 2003).

⁶⁰ *Ibid.*

⁶¹ Frederick E. Webster. "Executing the new marketing concept," *Marketing Management* 3, No. 1 (1994).

⁶² Winston Churchill. *The Second World War* (London: Mariner Books, 1986).

⁶³ Arnaud de la Grange and Jean-Marc Balencie. *Les guerres bâtarde* (Paris: Tempus, 2008).

- “How does the population consider each adversary? What is the proportion of potential supporters, enemies, or fence sitters? Are these categories clearly emerging in advance? Can we, for example, consider which attitude the bourgeoisie, rich farm operators, small farm operators, etc., will adopt? Can pressure tactics be exerted on these different social classes? Are there any factors of division by which to separate one of these classes from the others to the benefit of one of the two adversaries?”⁶⁴
- *Accurately Target Customers.* As well as audiences, targets and info-targets.
- *Manage for Profitability, not the Sales Volume.* “What we need to understand is that henceforth, political victory could, at times, well be recognized without a decisive military victory.”⁶⁵ Never lose sight of the ultimate political aim, which is the true reason for conflict, and avoid the temptation to assess the success of waging war solely by the volume of destruction.
- *Let Client Value Guide You.* This means making sure that decisions on conduct are taken keeping in mind the population’s interest, because, ultimately, this is what will confirm victory. “Contrary to conventional war during which the main stakes are the respective powers of the opponents, all counter-insurgency actions must aim at the protection of the native population.”⁶⁶
- *Let the Customer Define Quality.* “People instinctively know what is fair. Only through the concrete measures we take will they judge the value of our actions. The land force may indeed win a war, but peace will endure only if it is just.”⁶⁷
- *Measure and Manage the Customer’s Expectations.* These expectations are defined and measured by market study results. The theatre study must include an exact measure and a real management of the population’s expectations.
- *Build Customer Relationship and Loyalty.* “We must not do anything that could physically and psychologically separate the task force from its plan for the population; in particular, all the administrative measures that terrorize and wound — physically or morally — the population strengthens the adversary. He then poses as a defender and directly benefits from the establishment of the action-reprisals-retaliation cycle. Conversely, we must seek to physically and morally separate the irregular forces from this same population, to isolate them from their physical and moral support.”⁶⁸
- *Define the Business as a Service Business.* Marked by Gallieni, then Lyautey, the warriors of the colonial Empire spent more time building roads, bridges, schools, and hospitals. In his theorization of counter-insurgency, Galula points out that the soldier must be prepared to wear many hats depending on the situation: He must be able to be both a teacher and a nurse. This is not always easy, especially when he comes up against a deeply-rooted misunderstanding, because as General Desportes said, “It is

⁶⁴David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

⁶⁵General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

⁶⁶David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

⁶⁷Roger Trinquier. *La Guerre moderne* (Paris: La Table ronde, 1961).

⁶⁸General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

also — and maybe especially — a cultural issue and this culture must become that of militaries. They must understand that what did not seem in the past to belong to their normal field of reflection and action has now become “their business,” and is now part of their trade. Much more than an expert’s responsibility that one would associate, as much as is needed, with “warrior” structures, it is very much a matter of general “know-how” and a state of mind. It implies that military units organically integrate within them, not only operational communications experts but Civilian Affairs experts (economic rebuilding; education; information; governance; infrastructure; law enforcement; health, etc.).”⁶⁹

- *Commit Yourself to a Course of Continued Innovation.* Because the customer/population takes for granted what has been solidified for too long, innovation is imposed as an essential vector for maintaining attention, interest and control.
- *Manage the Culture at the Same Time as Strategy and Structure.* This topic would probably be one of the broadest. While understanding the culture inherent in the theatre of operations is essential, the subject here is the culture of our own machinery, population, political leaders, and especially warlords, and the culture they will impose on their subordinates. For example, we will later see the controversial impact of the “warrior ethos”.
- *Grow with Partners and Allies.* Role of the United Nations, and NATO?
- *Destroy Bureaucracy.* We will not linger long on this tricky point. However, everyone will readily understand.

In marketing, Perception is Reality.

This is true not only in marketing. The reality of our world is filtered through the perception we are given of it. What ultimately makes the difference is the interpretation of this perception.

5.2. Influence Strategies

There is an art to influencing others without threat or counter-argument; some succeed indirectly, through opinion, persuasion (rhetoric, propaganda, advertising...), prestige of the brand, or spread of example, by changing the way the other person (the target of influence) interprets reality, by mobilizing allies or intermediaries to put pressure on the attitude of their targets (networks, influences, mobilizations)... This is called **influence**.

Xavier Mazonod and François-Bernard Huyghe — *Influence et réputation sur l’Internet*

A relatively new domain in the range of marketing communication tools, Influence Strategies are at the crossroads of Psychological Operations, Economic Intelligence, and Corporate Communication. Faced

⁶⁹General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

with the declining effectiveness of classic marketing methods, advertising in particular, businesses and communication theorists have looked into possible solutions to two ever-present needs: (1) the need for a business to manifest its existence on the market; and (2) the need for the market to obtain credible information to make informed consumer choices.

Companies such as Comes-Communication,⁷⁰ a French company in the region of Paris and an innovator in the field, specialize in the development and execution of Influence Strategies. This type of strategy highlights the existence of “opinion relays”. This very singular corpus comprises journalists, professors, and all types of experts who share a very particular quality: they are trustworthy and their opinion is followed. This makes them the preferred info-target of strategies of Influence Communication, indirect communication at its best.

This method depends on a number of reports. A product or a service is bought not only for its intrinsic value, but also for its related symbolic function and relevance, and the confidence and credibility conferred on it. Also, beyond showcasing their core expertise, organizations must emphasize, shape, and maintain their own identities, and assume their differences. To forget or ignore this parameter would be tantamount to being subject to others’ judgement. Like it or not, the world forms an opinion of our actions. A genuine reputation is built only in the long term. It rests on the unambiguous assertion of a precisely defined and clearly accepted identity. Benefiting from a strong identity cannot be improvised. It is a serious, measured, constant, and strategy-related initiative. Being credible requires stating clearly where one is headed, to make it known, and to set landmarks. Interests that define today’s economic rivalries do not depend only on commercial or financial parameters. They must also integrate cultural and societal variables, in short, ideas and representations of the world.

In his June 2009 interview with Alain Juillet, former Chief of Economic Intelligence with the French Republic’s Prime Minister and Comes-Communication’s director, Bruno Racouchot proposed an original picture of influence, referring to the image of a tree: “What does being influential mean if not having the capability to influence evolving situations? Influence is not an illusion; it is rather its antithesis. It is a manifestation of power. It plants its roots into a certain approach of reality; it is experienced through a way of being. The core of an Influence Strategy worthy of the name very clearly rests on a finely chiselled and clearly assumed identity. A succession of “photo opportunities”, the skilful management of an address book, the implementation of bold vectors are worthwhile only if they are underlain by a clear strategic line, the result of a committed reflection on identity. We could say that Influence Strategy involves the hard task of clarification before decision processes, at the level of direction or strategic direction. Such an approach requires both lucidity and courage, for demanding one’s own identity requires that one recognizes he is different from others, chooses his own values, and formulates his ideas in line with an intimate and authentic logic. After decades of superficiality, a time for structure and depth has returned.

Influence deserves being referred to in the image of a tree. Seeing its branches rise up towards the sky

⁷⁰ <http://www.comes-communication.com/>

cannot help but remind us of the work carried out by the roots in the bowels of the earth. If it is to be strong and coherent, influence strategy must launch from a reflection on the identity of the structure involved, and be supported by a top-notch discourse. Influence can usefully bear its fruits only if it can have repercussions through structured, logical, and harmonious messages, proving management's capability to see far and in the long term. Top managers, communicators, civil and military strategists, experts, and academics must share their know-how. In a network-connected world, sharing knowledge, the ability to adapt to new configurations and the will to assert one's own identity constitute the master keys of success."⁷¹

We have come into easy access to the economy of knowledge, where the weight of intangible heritage is shown to be a crucial factor. Decision-makers will therefore easily understand that the fine-tuning of a new and resolutely positive type of Influence Strategies is an authentic and still unexploited pool of riches. It is in the best interest of the staffs of public and private organizations to consider these variables as a key element to integrate into their general strategy, because this is where the referents and parameters of tomorrow's debates are formed.

Transposed into a context of conflict or war, we immediately see the interest that such an approach represents, as well as its difficulties. It requires an awareness long before the conflicts come to be; a proactive rather than reactive attitude. But the effectiveness of a well-conducted strategy of influence is formidable.

5.3. Change Management

Warfare is also the imposition, through force, of a change: a change of beliefs, values, belonging, territoriality, lifestyle, and future. Populations are usually restive in the face of change. Civil societies who specialized in change management understood that well. This specialization found its "guru" in the person of John Kotter.

In two major books, *Leading Change* in 1995 and *The Heart of Change* in 2002, John Kotter tried to theorize an effective approach to induce a population to accept the need for change. This approach can be summed up in eight steps:

- *Establish a Sense of Urgency.* To properly initiate a process of change, first a sense of urgency must be created, and not by explaining the need for change, but by demonstrating it, to generate the feeling that it is high time to act. It is indeed desirable, when training a population for war, or when a state or a community needs to be convinced to allow itself to be invaded, to establish a form of urgency, and of lack of choice. Despite the sense of urgency, John Kotter thinks that the population will be divided into twenty per cent enthusiasts, seventy per cent undecided, and ten per cent saboteurs. David Galula and Vincent Desportes share this vision:

"Whatever the political cause may be, there is always an active minority supporting the cause, a neutral majority, and an active minority opposing the cause. The exercise of power consists of

⁷¹Communication & Influence. Special Issue, June 2009, interview with Alain Juillet by Bruno Racouchot, available at www.comes-communication.com.

relying on the favourable minority in such a way as to rally the majority and to neutralize or eliminate the hostile minority.”⁷²

“Experience proves that, schematically, during the initial phase of an intervention, the population is divided into three proportionally uneven parts: 10-15% favour the intervention, opponents make up the same percentage, and the others, which account for about three quarters, are indifferent to everything but their individual interests, awaiting the situation’s development before choosing sides. It is exactly this population, the one Anglo-Saxons call “fence-sitters”, that constitutes, for both the participant and his adversary, the true target, the one they must shift to their side to win. The manoeuvre is there: containing the adversary, forcing him to renounce his projects, or destroying him if necessary, but above all implementing all possible means — and most of them are not military — to bring this mass of fence-sitters to see that their individual, then collective, interest lies in the success of the intervention. We must create symbols of true progress. Trusting in the participant, in his impartiality, and in his selfless will to the benefit of the populations involved, is the key point.”⁷³

- *Create a Coalition.* Successful change requires a dedicated, enthusiastic, and committed team. Change Management is essentially a matter of heart: the members of the project team must become a source of inspiration, not only by their optimism, but also by their dedication and credibility. All is perception, and the perceived cohesion of a coalition is a major element. During the First Gulf War, the Coalition itself was the centre of gravity that Saddam Hussein applied himself to destroying by trying to make Israel part of the conflict.
- *Develop a Clear Vision.* The articulation of a clear, simple and motivating vision is a key step to success. Organizations facing major resistances usually present an analytical and complex vision of the desired situation, which hardly affects the individuals concerned. A vision must testify to a concrete action and be articulated simply and quickly. The attempt at a “bombastic” demonstration of the existence of weapons of mass destruction did not work. “Nach Paris!” was clear, accurate, and in its time very motivating.
- *Share the Vision.* In this context, the art of communicating the vision and the subsequent strategy becomes an important issue. The objective is to understand the feelings, fears, and misunderstandings that change can trigger in people. Being aware of these resistances and taking them carefully but convincingly into account remains the main ingredient in promoting commitment.

“Propaganda is the main instrument of moral support; it can be used to reverse public opinion where unfavourable, or to strengthen public sympathy where it exists.”⁷⁴ There is a danger, however, in the temptation to demonstrate rather than to appeal, because “in his quest for a contrary cause, the loyalist can depend only on second-order problems, which invariably call for reason at a time when passion is the main driver.”⁷⁵

⁷²David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

⁷³General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

⁷⁴David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

⁷⁵*Ibid.*

- *Make People Accountable to Eliminate Obstacles.* Mechanisms aimed at eliminating obstacles and promoting action must be implemented to maintain the initiative's cruising speed. Bureaucracy has no place in Change Management. Managers must be encouraged to remain optimistic and even support change within their team.

- *Set Short-Term Objectives.* Organizations that have been fairly successful in appropriation and integration of change applied the "tiny steps" theory. They soon learnt how to produce a series of obvious successes that have a significant impact on all personnel and on the executives who financially support change. It is recommended to celebrate these short-term gains, to make the recounting of these achievements available, and to collect positive and meaningful evidence.

"The first days — the Golden Hour at the close of the initial phase of combat — are crucial. In a first approach, the Maslow pyramid accurately describes the list of priorities in action (physiological needs, safety needs, and belongingness needs). No other action will have an impact so long as the basic human needs have not been met. Consequently, responding to immediate concerns is the first priority."⁷⁶

- *Consolidate and Continue to Advance.* So long as the vision has not completely materialized, we need to persevere! How? By maintaining the sense of urgency, by checking the project team's enthusiasm, by communicating and arousing commitment, by challenging obstacles, and by seeking new inspiring situations.

- *Embed Change.* We must not forget that an important change requires a change in culture. We must make sure that changes permeate the organizational culture so that new ways are adopted and maintained. The methods vary but in no case should we forget during planning the phases of exploitation, end of conflict, and return to calm. The population's fundamental expectations and needs must be addressed, by offering "bread, entertainment, and if possible work, to win back minds and lure sympathizers of insurgency away by reinserting them into a 'normal' professional activity. The revival of local business activity is the cardinal point of this process, which allows the start of a virtuous circle. The reopening of nearby businesses and of services, just like the creation of micro-businesses, then becomes a vital issue. Microcredit becomes a 'lethal weapon' against global guerrillas."⁷⁷

5.4. Theodore Levitt and Marketing Myopia

In 1960 Theodore Levitt, then a professor at Harvard, published an article titled "Marketing Myopia". The article had a resounding success and is recognized as one of the cornerstones of modern marketing. The article was re-edited in *Harvard Business Review* in 2004.

In this article, Levitt argues that it is not the markets that have become saturated or have matured. It is the actors' tunnel vision that prevents them from seeing beyond the market and immediate competition of currently marketed products. Why this myopia? Because businesses reason with regard to their prod-

⁷⁶General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

⁷⁷Arnaud de la Grange and Jean-Marc Balencie. *Les guerres bâtarde* (Paris: Tempus, 2008).

ucts or services, and not their clients' expectations. They must constantly ask themselves the following questions: "What industry are we really in?" and "What is my market?" These questions are delicate and disturbing, which explains why they are rarely asked, and even more rarely have a satisfying answer. "A growing market does not force industrialists to think, to reflect, and to be imaginative. If reflection is the intellectual response to a problem, then the absence of problems leads to the absence of reflection." The absence of reflection leads to refusal of change and wallowing in one's comfort zone. Achievements and theories are not questioned. We swim in self-satisfaction, removed from market realities.

Levitt identifies what he calls a cycle of self-distraction:

- Believing that growth comes from an increase in the market and in population;
- Believing that there is no substitute for the main product offered by one's industry;
- Believing excessively in mass production and in cost reduction; and
- Believing in a product that is too easily subjected to quantitative control and scientific experimentation.

This leads to an unfortunately classic behaviour that can be observed in many businesses, often directed by technicians or financiers: a product is launched, not because the market is asking for it but because it is technically possible to make it. Moreover, market studies are often incomplete and deceptive, and do not seek what the market really desires but what it prefers amongst what the manufacturer already decided to offer. On the contrary, says Levitt, "a business should think of itself not as a product maker but as an acquirer of clients, and should do everything in its power to attract them." Astride marketing and strategy, he encourages us "to see differently and really listen!" To "think differently" is something that would be insisted on by General Desportes who, in *La Guerre probable*, also quotes Ralph Peters: "We are seduced by what we can do; our enemy focuses on what he must do."

While businesses are often cut off from market realities, what happens to our troops in a counter-insurgency context? Are we sure that the solutions, strategies, and "products" put in place meet the expectations of the market/population? How do we make sure we ask ourselves the right questions? What is the business's objective? Eliminating the greatest number of enemies possible? Or meeting the needs of the population? What are we doing to think differently? "What if the best weapon against IED is regular garbage pick-up, and overhauling of the road system? Especially when the 'temptation to armour-plate' runs the risk of further isolation of the troops, and cutting them off even more from the local population."⁷⁸

Unfortunately, reluctance to use IOs often stems from this principle: Comfortable complacency in the technically perfect execution of hard-won achievements, and the impossibility to ask oneself the real questions – the disturbing ones – because they would lead to rethinking strategies and approaches, and even to changing one's values.

5.5. Viral Marketing and Social Networks

It would be impossible to end this chapter without at least touching on the latest innovation in the world of communication and marketing: social networks and viral marketing.

⁷⁸Arnaud de la Grange and Jean-Marc Balencie. *Les guerres bâtarde* (Paris: Tempus, 2008).

Direct and free communication of provocative contents from an unidentified source, using the Internet to influence or persuade an audience to propagate the same contents to other users⁷⁹, viral marketing is defined as an action conducted by a business to increase its impact on the market and improve its image or that of its products amongst a target group. Contrary to traditional marketing, consumers themselves become the main vectors of brand communication. For interest, curiosity or entertainment purposes, they propagate information to their network of acquaintances. This technique offers three main advantages: its cost is much lower than direct marketing; the intensity and speed of the message broadcast can be very significant; and the message has a positive connotation by being recommended by an acquaintance, therefore an indirect opinion relay.

Viral marketing is a superb civilian analogue to a well-planned and -executed psychological operation. In fact, viral marketing is nothing but a psychological operation under another name.

The message conveyed by viral marketing (VM) is often specific — buy, look, do or even be something. A frequent argument is that VM does not propagate information but rather generates an attitude. Such an influence is in fact the *raison d'être* of marketing in general. The vast difference lies in target audiences and legal framework. Initially, it was feared that what was also known as “stealth marketing” could be unethical, even illegal. However, marketing professionals are not subjected to the same legislative restrictions as are conductors of Psychological Operations.

We could not pass over to silence this last iteration of exploitation of the “Web”. Examples of its use within the framework of the propagation of insurgent ideas are innumerable. “This modus operandi presents strong analogies with the recent evolution of Internet workings, in its Web 2.0 version, characterized by the emergence of collaborative Wikipedia- or YouTube-type networks. This approach makes it possible to very quickly broadcast the smallest technical, tactical, operational, or logistical innovation within the ‘community’, from Baghdad to Karachi, Algiers to Mogadishu, and Peshawar to London. Marc Hecker, an IFRI (Institut Français des Relations Internationales) researcher, discusses this subject in ‘Wikiterrorism’.”⁸⁰

⁷⁹Porter, L. *Journal of Interactive Advertising* (2006).

⁸⁰Arnaud de la Grange and Jean-Marc Balencie. *Les guerres bâtarde* (Paris: Tempus, 2008).

6. Central Themes of Reflection

Admittedly, ten years ago IOs were identified as a capital element in achieving political and military aims. We talked about “close integration”, about necessity and priority. Ten years later, there is still much to do. After concluding the short overview of Information Operations in previous chapters, I would like to give the reader a few central themes of reflection.

“Anyone interested in make-believe conditions finds several ways of discussing war, an activity waged for beliefs, against beliefs, and by beliefs. For the military, belief takes part in psychological warfare: disinformation, censorship, propaganda, and media offensives act on convictions to arouse or eliminate. They must be propagated or thwarted with the same precision as physical forces of destruction. It is a problem of effectiveness.”⁸¹

6.1. To Writers...

...or tomorrow’s writers of future doctrines, I would like to present the following points.

6.1.1. Principles

IO principles are still not clear enough in people’s minds. Admittedly, everyone understands more or less that information is important and that someone must direct it. But that it should be everyone’s responsibility still belongs to the domain of theory, if not utopia. Given the nature of the conflicts we are currently facing, IOs are understood in a context of counter-insurgency. Let us therefore use this context for a while, to better understand some of its principles.

6.1.2. Ideology and Cause

“The insurgent has a significant asset: the ideological power of a cause on which to base his combat. Conversely, the loyalist must support a heavy burden: maintaining order across the country. Naturally, the insurgent’s strategy aims at converting its intangible assets to material resources, and the loyalist’s strategy aims at not depleting his forces in a combat against immaterial powers.”⁸² David Galula reminds us here of the fundamental principle of economy of force in an asymmetric context. “While the industrial tools we use in asymmetric warfare are very costly, because it is inflicted upon us, such warfare costs the enemy next to nothing because he knows how to maintain the initiative, and the choice of time, place, and method of action... he has adopted the principle of economy of force!”⁸³ There is great danger in using an incorrect system of measurement. One sees this danger in civilian businesses as well as in war management. Using the wrong KPI (*Key Performance Indicator*) or MOE (*Measure of Effectiveness*) has catastrophic consequences. Economizing on thought, or using the same indicators as those from a previous fiscal exercise or conflict, poses considerable dangers.

“Yesterday, the core military action was destruction, and intelligence was primarily intelligence on objectives, while henceforth, the core is understanding and intelligence of the situation, and the perception of micro-situations and micro-objects. ‘Transparency of the battlefield’ appears more and

⁸¹François-Bernard Huyghe. “Croire contre”, *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999).

⁸²David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

⁸³General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

more like a theoretically good but false idea. Yesterday, we thought of fighting ‘through’ information; today we realize that we are forced to also fight ‘for’ information.”⁸⁴ General Desportes confirms that today knowing is not enough; we also need to understand.

And to understand, we sometimes need to go farther back — to inform ourselves, becoming experts in the adversary’s cause. Understanding the “cause” is essential.

“Then, if the adversary is no longer mostly of the state, but is “non-” or “post-”state, he will always be recognized by a referent of identity.”⁸⁵ It is in this context that the adversary will have to create and define his cause, by basing it on an easily identifiable and communicable problem. “If the problem is only latent, the first thing for the insurgent to do is to make it obvious by ‘elevating the political consciousness of the masses’.”⁸⁶ The problem can even be virtual since it appears real. The adversary’s cause must be such that we cannot embrace it, or if we do, it can be only at the risk of losing the influence we are seeking to defend.

To understand this cause, we also and especially need open-mindedness. Indeed, resentment of the rejected, the weak or the scorned leads to radical behaviour; it generates excessive hatred. “The positive excitement that leads an individual to identify with his group, his nation, and his flag is complemented by the negative action that prevents him from identifying with another.”⁸⁷ Clausewitz says that there are symbolic stakes that lead to total war. If “the facts of discourse that are considered true (or just) can have other than discursive effects,” those who deny them will experience even more sensitive effects. “Because that effectiveness is measured not by the scale of attraction but by a suffering that knows no scale. Collective belief does not depend on evidence that can or cannot be administered. It is not refuted: it can only be wounded.... Indeed the arbitrariness is not negotiable, and the absolute withstands no relativism.”⁸⁸

“Rising to see better, linking to understand better, situating to act better.”

Joël de Rosnay

Understanding the cause to better fight it. According to what rules or what principles? David Galula gives us a viewpoint:

“If the loyalist government can apply neither conventional war tactics nor the insurgent’s doctrine, the inevitable conclusion is that it must develop its own tactics. These tactics should consider not only the nature and characteristics of revolutionary war, but also specific counter-insurgency laws and associated principles:

- First law: popular support is as vital for loyalists as for insurgents.
- Second law: this support is acquired through an active minority.
- Third law: popular support is achieved only under certain conditions.
- Fourth law: the intensity of effort and the quantity of methods are essential.”⁸⁹

⁸⁴ *Ibid.*

⁸⁵ Arnaud de la Grange and Jean-Marc Balencie. *Les guerres bâtarde* (Paris: Tempus, 2008).

⁸⁶ David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

⁸⁷ François-Bernard Huygue. “Croire contre,” *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999).

⁸⁸ Louise Merzeau. “Le devoir de croyance,” *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999).

⁸⁹ David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

From this emerges the main objective to be pursued: proving that the *status quo* is more beneficial to the population than the revolution advocated by insurgents. We must simply invent a competitive opposing cause, and communicate it convincingly. Indeed, “when a man’s life is at stake, actions of propaganda cannot suffice to convince him.”⁹⁰ Today’s challenge is that although, to rally the undecided, we could have proven yesterday to the populace that its prosperity would be greater in the market economy than in collectivism, “can we really counter the spiritual offensive of the Jihad with material arguments?”⁹¹ This thought constantly shifts from perception — the seen — to a representation of images, which appeals to belief. Beliefs need images in order to become widely applicable and relatable. But it is also those images that can save us from the totalitarian risk created by any belief. How can these two statements be reconciled? Are there good and bad images? In fact, the dynamics created by any image are inseparable from the way it connects with other forms of symbolism such as sensations, emotions, and impulses to act on the one hand, and verbal language on the other.”⁹²

6.1.3. Culture and Contempt

In the creation of this opposing cause, it would be desirable to draw from market research methods, marketing, and positioning of a product. A well-executed market study will first try to properly understand and grasp the culture of the target population. Indeed, John Keegan reminds us that “cultures remain what first determine the art of war.”⁹³ Particularly, and in this sense, the concept of normality must be re-examined. It is indeed uselessly presumptuous to want to impose “our normality” on countries in which we intervene, while “their normality” can still include, for example, a certain level of authoritarianism, corruption, prevarication, inequalities, organized crime, etc.⁹⁴ In addition, the communicated message will be heard only if the person issuing it does not appear too different, and too distant, from the person meant to receive it.⁹⁵

The danger of ignoring this principle lies in its showing proof of misunderstanding, often paternalism, and sometimes even contempt. “Contempt is refusal to recognize another’s intelligence, refusal to understand that he is rather more gifted for innovation than we are, and denial of another’s creative will. Contempt is also the simplistic globalization of entities opposed to logical and well-diversified identities. Confusion and denial of specificities do not allow a proper understanding of crises. Contempt is still the caricature that prevents one from understanding well and therefore fighting well. Contempt is the best recipe for failure!”⁹⁶ With contempt for others comes the temptation to gauge everything by our own yardstick and see everything through the filter of our own eyes. “Perception without an image-filled representation does not permit thought, but representation that does not look back at perception blocks it. We have to start representing what we perceive in order to start thinking, but we must also constantly return to what we perceive in order to avoid solidifying representation into belief. However, we often tend to do the opposite. We behave in every respect as if the surrounding world corresponded

⁹⁰ *Ibid.*

⁹¹ Philippe de Monteton. Introduction by David Galula, *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

⁹² Serge Tisseron. “Images et croyances,” *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999).

⁹³ Arnaud de la Grange and Jean-Marc Balencie. *Les guerres bâtarde* (Paris: Tempus, 2008).

⁹⁴ General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

⁹⁵ *Ibid.*

⁹⁶ *Ibid.*

exactly to the perception we have of it.”⁹⁷

The other danger is to want to do everything ourselves, therefore necessarily our way and according to our principles, which are assuredly better because they are ours! Contemporary crises have indeed shown us the vanity of transforming a political system from the outside, and the difficulty of reconstructing a social contract; reconstructing a nation against its will; and building a state with imported contrivances. “It is difficult, even counter-productive, to ask another to relinquish what he is by refusing to accept his uniqueness, even though it would shock our ethnocentric idealism! On this theme of involvement of local populations and the respect of others’ cultures, we all know Lawrence of Arabia’s quote: “Do not try to do too much with your own hands. Better the Arabs do it tolerably than that you do it perfectly. It is their war, and you are there to help them, not to win it for them.... The less apparent is your interference, the greater will be your influence.” To respect this persistent truth, there is no choice but to lean on the existing structures and the élite; both are the fruit of a long history that cannot be replaced by quick action. Lyautey is clear: we must govern with the mandarin and not against the mandarin.... That is to say that in any society there is a governing class without which we cannot do anything.”⁹⁸

To summarize, we run three major risks where our adversary is concerned. The first is simply to consider him a negligible quantity in analysis. The second is to conceive of him as another self, and ascribe to him the same modes of reasoning, ways of doing things, etc. The third is to feel contempt, quickly generated by the acknowledgement that he draws on elements of power different from our own, unaware that this is in fact his strength.⁹⁹

Once the temptation of contempt is set aside and others’ culture is, if not assimilated, at least understood, the implementation of a war of ideas remains: the one through which the conflict will be won.

6.1.4. Cities and Populations

“War has always been a calamity for populations. In the past, only the inhabitants who were in the armies’ path suffered that scourge. Today, modern war affects a country’s entire population, both people from major cities and those in the most remote countryside. The enemy, installed within the population, will always try to get his means of support from the inhabitants.”¹⁰⁰

At the contextual level first, conflict occurs in an urban setting, even amongst the population that is its main objective. What first comes to mind is the very specific character of this urban setting. “In the city, the world is not only military and rational. It is also — and more so — civilian and emotional: it imposes a global approach.”¹⁰¹ In the city, where war is spectacular, the media are omnipresent. It is in the city that the asymmetric soldier will best be able, under the constant watch of the media, to execute his strategy of provocation and propaganda through his adversary’s collateral ‘blunders’.¹⁰² In the city

⁹⁷Serge Tisseron. “Images et croyances,” *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999).

⁹⁸General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

⁹⁹*Ibid.*

¹⁰⁰Roger Trinquier. *La Guerre moderne* (Paris: La Table ronde, 1961).

¹⁰¹General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹⁰²*Ibid.*

everything is concentrated. It is the place, both by military favour and by definition, of the “three blocks war” where one is led to conduct three fundamentally different actions within three adjoining blocks. This concentration has immediate and multiple effects on the perceptions of both camps. “The urban areas gather symbols within an enclosed space, concentrate violence, and focus attention; they crystallize, under the media spotlight, all concerns and all eyes.”¹⁰³

“The enemy moves among the population like a fish in water.”

Mao Zedong

The local population naturally constitutes the first target of communication manoeuvre, with the rallying of its will as strategic objective, and intelligence-gathering as tactical objective. The forces’ first mission is an information and intelligence mission, not only to counter but also to “act with”. Gathering, analysing and disseminating must also allow them to act proactively, and to detect the expectations and needs of the populace in order to convince them as quickly as possible of their interest in the interference to which they were subjected. Arriving in a theatre of operations means being part of a context the understanding of which is the condition of success. Therefore, information henceforth assumes a prioritized and multidisciplinary character.¹⁰⁴ “The main source of information on guerrillas is intelligence gained from the populace. However, it will deliver information only if it feels safe, which is impossible so long as the threat of insurgent forces is upon it.”¹⁰⁵ This is why the effort must focus on protection and guidance, which ensure the return of law, giving the opportunity to conduct ordinary activities that bring prosperity. “Permanent, and skilfully adapted to its intended recipients, psychological action makes this major tool available: cooperative intelligence. It provides the capability of action and protection of an outside participant. Trustworthy information creates a virtuous cycle that enables the insertion of a military force within a population, provided this presence is clearly seen as temporary.”¹⁰⁶ War is not waged between societies; it is waged within societies. Thus, the population has henceforth established itself as an actor, as well as a major stake. Shifting from a world where the population was “the rear” —as opposed to the front — armed forces now act within it and in reference to it. Military forces have entered the era of war within populations. Facing Western forces, populations easily subject to mobilization in a hostile crowd constitute an “army” that can be destroyed, a force that makes it possible to act while being protected and masked. But as much as an adversary, they are the target that needs to be influenced, an objective whose reactions will determine the final result: success or failure. Because the objective is human society, its governance, social contract, and institutions, rather than a certain province, river, or border; there is no longer a line or terrain to conquer or protect. The only front that engaged forces must hold is that of the population. The target of action is no longer the adversary but the population. In the cores of cities, it’s a matter of winning the battle for adherents while reconstructing the “social contract”. But it is in our best interest, in the short and long term, that promises be kept. Therefore, the essential point is not to promise the people, or let them hope for, more than we can deliver. In Iraq, one of the immediate and permanent difficulties was the gap between what populations were expecting in terms of reconstruction after three decades of neglect, and what the Coalition was able to do, and do fast enough so as not to disappoint them. To be

¹⁰³ *Ibid.*

¹⁰⁴ *Ibid.*

¹⁰⁵ David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

¹⁰⁶ Roger Trinquier. *La Guerre moderne* (Paris: La Table ronde, 1961).

effective, the use of force must target a political effect that matches what is expected by populations thrown into disorder, chaos or arbitrary power. This essential requirement, impossible to avoid at the cost of failure, strongly restricts the use of forces and the definition of objectives to achieve. It also shows a great ethical dimension in conflicts where an important part of the result is played out in psychological confrontation.¹⁰⁷ “In a conventional war a soldier who, when ‘told off’, would not counter with maximum firepower, would fail in his duty. In a revolutionary war, the reverse is true: the rule is to use force as sparingly as possible.”¹⁰⁸

6.1.5. A Changing Profile

This requires from today’s soldier, and even more so from tomorrow’s soldier, to present an evolving and changing profile. As always, it is good to look back and refer to Gallieni’s and Lyautey’s models, to colonial forces that built bridges, roads, schools, and hospitals. It is truly a cultural matter. Militaries must embrace this culture. They must understand that what appeared yesterday not to belong to their regular area of thought and action has also become “their business”, that it has now become part of their trade. “In these circumstances, one would prefer a Roneo [mimeograph machine] to a machine gun, a qualified military paediatrician to a mortar, cement, or barbed wire specialist, and office employees to infantrymen.”¹⁰⁹ Much more than the responsibility of a specialist that one could attach, as needed, to “warrior” structures, it is rather a matter of general know-how, a state of mind. It implies that military units must organically integrate within themselves not only operational communication specialists, but also Civil Affairs specialists (economic reconstruction; education; information; governance; infrastructure; law enforcement; health, etc.)¹¹⁰ as well as a social service “which will look thoroughly into all the woes that the war will have generated.”¹¹¹ Billeting troops for solely military tasks, at a time when certain urgent and vital actions must be taken and no one else is available to execute them, would be senseless. “The soldier must be prepared to play all the key roles of this situation: he must be able to serve at once as a social worker, task manager, teacher, nurse, or even scout leader.”¹¹² This is not simple and “depends on the adaptive ability of the stabilization forces. These forces must be able to shift at very short notice from a classic military posture (favouring manoeuvre and shock) to a social engineering function.”¹¹³ Lacheroy went even further when he wrote: “Operational staffs are domestic staffs under somebody’s heel. That is how it must be in revolutionary war: undisputed supremacy of the territorial over the operational.”¹¹⁴

However, all this goes against a fashionable concept: warrior ethos. What is it, and what should we think of it?

“The U.S. Army’s ‘Warrior Ethos’ was introduced in 2001. At its core is the Soldier’s Creed. Note that it enjoins the soldier to have just one type of interaction with his enemy: to engage and

¹⁰⁷ General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹⁰⁸ David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

¹⁰⁹ *Ibid.*

¹¹⁰ General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹¹¹ Roger Trinquier. *La Guerre moderne* (Paris: La Table ronde, 1961).

¹¹² David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

¹¹³ Arnaud de la Grange and Jean-Marc Balencie. *Les guerres bâtarde* (Paris: Tempus, 2008).

¹¹⁴ Colonel Lacheroy, Charles. *Guerre révolutionnaire et arme psychologique*, Conference at the Military School, Paris, July 2, 1957.

destroy him. Not to defeat him, which could eventually open the door to a number of other options, but to destroy him. It is certainly a war-fighting credo, and has no doubt fulfilled its role, but it can in no way help soldiers to understand that on many occasions in unconventional situations they have to be soldiers, not warriors.”

General Nigel Aylwin-Foster (UK)

One may rightfully wonder if one of the greatest obstacles to using IO's non-kinetic components is not an insidious expansion of this recent version of warrior ethos. Created amongst the special operations community, the concept was legitimized by General Peter Schoomaker and perpetuated by his successor General George Casey Jr. In six years, this concept has wormed its way into every nook and cranny of both combat and support forces, and has probably reduced to nothingness the US Army's capability to successfully conduct stabilization operations.

The concept has quickly transcended borders and oceans, adopted by most United States allies. Because it proved itself a major obstacle in the deployment of non-kinetic assets, it is important to take a few moments to consider it.

We may ask ourselves whether there could be anything wrong with this concept. And on the surface there is nothing wrong with having a warrior's ethos within an armed force. The problem occurs when the concept appears to transform into a “sacred code of the Samurais”, eluding the control of its creators and approaching the “sacred path of the warriors towards Valhalla” — to the point where it causes serious delays in, if not completely halts, the process of transition towards stabilization.

What is the true nature of this concept, and what is its origin? In the aftermath of the September 11, 2001 attacks, the US Land Force had a response time considered to be very long. Many experts were even writing that it was not, and would not be, ready to react; unlike the Marine Corps, which was rumoured to have added two divisions, and which was taking the lion's share. In addition, the Land Force was suspected of having neglected its warrior capabilities in favour of technical capabilities. General Peter Schoomaker, recalled from retirement in 2003, then launched a vast operation of influence, centred around the “warrior's ethos”, which was supposed to consolidate the warlike capabilities of his soldiers. To that end, General Schoomaker drew his inspiration from his past in Special Operations and “borrowed” a few pages from the Marine Corps's manuals. But, unfortunately, what works well for some does not always work so well for others.

Originally, what appears in recruiting and training manuals seemed rather inoffensive:

*I will always put my mission first;
I will never accept defeat;
I will never give up;
I will never leave a wounded buddy.*

Everything becomes complicated when individuals and groups appropriate it, and give it their own interpretation, which leads to:

“We are Warriors, and leading anything other than Combat Operations is unworthy of Warriors.

Reservists and the National Guard are not Warriors. Stability Operations belong to others. This is a light infantry training center and this is where we forge Warriors.”

—General M. Barbero, Joint Readiness Training Center, Fort Polk, Louisiana.

No comments.

The catastrophic and disastrous effect of such a drift is its refusal — systematic and always growing within the land force — to conduct nothing but kinetic operations. Non-kinetic operations have therefore become completely depreciated, and the sole responsibility of Reservists, who were already considered a subclass. Despite obvious evidence that it does not work, the credo of most American Senior Officers remains that the annihilation of the enemy under a downpour of fire is still the best means of victory. The problem is that they are now eight years behind in the basic understanding of non-kinetic operations.

Most fortunately, the situation of the Canadian Land Force is not at that stage. Through documents such as *CFP 300 — Canada’s Army* or *Duty with Honour: the Profession of Arms in Canada*, a “Canadian ethos” concept was developed and it has never officially mentioned a “warrior’s ethos”. But one should be careful. This concept is attractive and, in a good Influence Operation that is well conducted, it plays on the emotional chords of frustration and adulation of the male ego, so basic that they work marvellously well. What does being a soldier mean today? The answer is not simple, but the question is worth asking, and debating intelligently.

In 1998 LCol Linder concluded thus:

“The shift in the line of thought will also require a change in officer recruiting, in the military education system, and in the management of non-commissioned officers. The industrial era of mass recruiting of engineers who think in terms of mass production to support Cold War attrition strategies must make way for the recruitment of a new kind of officer. Officers of the future must be historians, political scientists, regional experts and, in a way, diplomats who understand the subtle power involved in mastering a language and appreciating culture. Moreover, non-commissioned officers will have to be the world’s best experts in managing situations as unpredictable as peacekeeping in front of CNN cameras.”

Unlike CNN cameras, I seem to hear the description by Gallieni and Lyautey of armies. “These heavy evolutions lead us to rethink military identity: urban operations — the core of probable war — have entailed an imbalance between its former identity and the current exercise of the profession of arms, even though Marshals Gallieni and Lyautey probably saw in all of this nothing but a finally healthy return to know-how and soft skills that, not long ago, were perfectly mastered.”¹¹⁵

Uzbin (Afghanistan) and Warrior Ethos

Unfortunately, I am not surprised to see this happen, because we are in line with how the ambush was handled, with an immediate search for the culprits and ‘privatization’ of soldiers’ deaths — witness the organized displacement of families in Afghanistan.

¹¹⁵General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

What we are witnessing is the desanctification of the death, the sacrifice of the soldier. It was made sacred so it would be bearable, and acceptable. Particular rites, a veritable Republican liturgy, were put in place to make of these deaths, in their proper sense, something exceptional. These complaints would relegate them to ordinary deaths, as if by accident or as a news item.

These complaints concern symbolism. We need to understand that after the French Revolution, mechanisms were put into place to make the soldier-citizen's death acceptable. Prior to that, someone died for his King or his God. With the layman's religion, the citizen who died for his country reached the Pantheon; his name was engraved on a monument. These mechanisms date mostly from the Third Republic and reached their peak during the First World War, when each soldier was allotted one grave with his name inscribed.

With this desanctification of the soldier's death, where are we headed? Leaders were already terrified at the thought of giving the order to open fire...

— *Le sacrifice du soldat, corps martyrisé, corps sacrifié.*
Edited by Gilles Boetsch and Eric Deroo, CNRS Editions/ECPAD

6.1.6. Perception, Opinion, and Influence

To sum up, war occurs in the city amidst its population, and the latter's involvement is the price to pay. The adversary is armed with a cause and the media await us everywhere. Now that this backdrop is set, let us concentrate on the heart of the subject. What are we to do? Influence. "The target is the adversary's will, perceptions and understanding."¹¹⁶ It is no longer about perceiving masses of tanks and locating potential targets, but understanding social environments, behaviours, and psychology. It is a matter of influencing human will.¹¹⁷ At any rate, in view of Western technological superiority in the four classical operational spaces (land, sea, air and electromagnetic), the adversary is left with no choice but to seek strategies of circumvention in the spaces where they can fight on equal terms: infosphere and human space,¹¹⁸ where "they must maintain information superiority and expectations of opinion."¹¹⁹

This is difficult because "in his quest for an opposing cause, the loyalist can depend only on second-rate problems that invariably call for reason when passion is the primary driving force."¹²⁰

It is difficult because "adversary propaganda will transform a bombing into a terrorist raid that an unsympathetic world press will exploit against us."¹²¹

It is difficult because "any act of destruction — and its inevitable collateral damage — are quickly placed before the court of international public opinion, which is quick to judge based on criteria that are far removed from political logic; as it happens, advanced societies are fragile in the face of violence that is

¹¹⁶K. Ullman. Quoted by François-Bernard Huygue, in "Croire contre," *Croyances en guerre – Les Cahiers de Médiologie*, No. 8 (1999).

¹¹⁷General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹¹⁸*Ibid.*

¹¹⁹David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

¹²⁰*Ibid.*

¹²¹Roger Trinquier. *La Guerre moderne* (Paris: La Table ronde, 1961).

projected in a loop.”¹²²

So we have to start at the bottom, on the field, at the contact point. War has again become communication, thus an influence manoeuvre, and it is locally, at low levels, and through the “oil spot” method, that a global effect is created. We must think globally and act locally. And this with an aim to preserving at all costs what the adversary is trying to take away from us: legitimacy. “In the sacred field, controversy is the confrontation not between two arguments, but between two systems of legitimacy.”¹²³ Indeed, any terrorist act, any action against the population aims at questioning the legitimacy of the existing regime, or the legitimacy of the outside participant. Legitimacy implies legality, but it is far from being restricted to it. Its essential characteristic is that today, it is no longer definitively given nor definitively acquired.... It is built upon perceptions, and it is not the laws of war that mould the judgements of international public opinion. Intimately connected, from the start of an interception to its conduct, legitimacy must be approached with a dynamic perspective, which means it must be built, consolidated, and preserved at all times in the fragile area of perception.¹²⁴ “Today, television and its images establish an original truth system. Never before — and political people know it well — had we so thoroughly judged the speaker by the yardstick of his sincerity. Yet, the truth of appearance, and the evidence through authenticity, are the responsibility neither of the written press nor of agency dispatches: they specifically belong to the animated image.... Those who speak of the image would be all the more credible because they have suffered: a crying face cannot lie. The story of a ten-year-old child could not be untrue.... ‘We cannot think after seeing such scenes,’ wrote a viewer.... ‘The images speak for themselves,’ argued a Member of Parliament during the first days of the war. The system of evidence that has been established, and has presented itself from war to war, is completely new.”¹²⁵

Do we influence the adversary’s decisions? Certainly. Neutral parties’ decisions? Undoubtedly. But what about our own people? The ones whose political will, expressed by universal vote, sets the objectives and expectations? “Politically correct” thought, and even some laws, establish healthy restrictions to protect them. But should we ignore them for that reason? “An army, indeed, can begin operations only with the nation’s moral support; the army is the nation’s true image, because it comprises the totality of its youth, and it carries with it the hopes of the homeland. Its indisputable action must be exalted in the country so that it can maintain the nobility of just causes for whose triumph it is responsible. The army entrusted with leading the combat must receive unconditional, caring and devoted support from the nation. Any propaganda that would damage its morale, making it doubt the need for its sacrifices, must be mercilessly suppressed.”¹²⁶

In a March-April 2008 article published in the Institut des Hautes Études de Défense Nationale (IHEDN) Journal, Bruno Racouchot proposed the framework within which influence strategy is structured: “The purpose of an influence strategy is simultaneously to convince [the influence target] that the selected strategy is just, and to organize counter-influence actions in the face of exterior pressures and disinfor-

¹²² General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹²³ Louise Merzeau. “Le devoir de croyance,” *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999).

¹²⁴ General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹²⁵ Monique Sicard. “Qu’est-ce qu’un témoin?,” *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999).

¹²⁶ Roger Trinquier. *La Guerre moderne* (Paris: La Table ronde, 1961).

mation. Engaging [the influence strategy] effectively assumes a very upstream thought in order to acquire an ability of anticipation, and an objective vision of the environment, making it possible to optimize the use of economic intelligence tools and — why not? — some vectors of communication.” From then on, it is in the area of ideas, and of representations of the world that vectors of influence are set in place. Moreover, this has existed from time immemorial, in all configurations. Bruno Racouchot thus explains: “As far back as we go into human societies, ideas have always played a structuring role to attract or frighten, to assemble or exclude. Whether they take on mythological or theological traits, or whether they array themselves in dialectic finery dear to politics or to sociology, ideas are in essence linked to stakes of power. In rivalries or conflicts — economic or war-related, cultural or societal — ideas enable emphasis on or compensation for material differences. Those who can use them enjoy a sure advantage. The strong find in them the justification of his cause, the weak draw from them an energy that makes individuals or groups swing away from rational logic, thus establishing a counterbalance in asymmetric battles. In short, whether we delight in them or deplore them, as Renan noted, ideas lead the world.”¹²⁷

Therefore, a new state of mind should be promoted. And armies do not escape the rule: “We are dealing here with working totally upstream of strategy development. More than means, leaders need willpower and a certain state of mind to achieve this modernization. This is the most delicate exercise of all because it requires breaking free of the yoke of ready-made ideas, being able to assert one’s uniqueness in the face of surrounding discussion.” Therefore, the strategist requires a certain courage to adopt a position that is both innovative and unexpected. “From this perspective, we need to accept reality in all its scope! Conceiving, structuring, and implementing an influence strategy that is worthy of the name requires handling ideas and concepts without taboos, without any illusions, and without being afraid to assert one’s identity and vocation in a world that is constantly bombarded with references. Because it is precisely the annihilation of points of reference that contributes to this harmful situation, in which common sense is controlled and fashionable ideas are praised to the skies. The clear expression of ideas and their implementation within the framework of influence strategies are thus shown to be inseparable from an effort, in form and content, to give new meaning to delivered messages, to emphasize points of reference, and to structure developed logic.”¹²⁸

Influence is a formidable weapon, in the sense that it gives a new perspective to designated civilian or military targets. “Men, in their great majority, instinctively feel the need to dream by building utopias. Although few people are ready to seriously bank on constructivist utopias, societal utopias are popular; even more so because institutions — primarily political — that traditionally were supposed to give meaning to building and ensuring the scheduling of the city, are today lagging behind opinion studies. The emergence of “all-media” reinforced by the rule of “experts”, and the emergence of “new subjectivities” relayed on the Web by “prosumers”, have shattered our societies’ architecture and developed an ideological corpus that only appears to be soft. To this fading meaning, disappearing points of reference, and reduction of populations to infantile levels, are added, in a jumbled fashion, the reign of the ephemeral and of immediacy, the difficulty in sorting out the real from the virtual, the thirst for euphoria corollary to existential anguish — all of which again require entertainment and evolving utopias.... The circle is closed!... It is difficult in such a configuration to dissociate the development of strategies of influence

¹²⁷ Bruno Racouchot. "Stratégies d'influence: le rôle-clé des idées," *Défense, IHEDN Journal*, No. 132, March-April 2008.

¹²⁸ *Ibid.*

from the requirements of communication. The implementation of influence strategies remains inseparable from a reflection on the new injection of meaning into the developing discourse. Here we must know how to extricate ourselves from usually concocted rules in order to play only on emotional chords. In the same way, we must engage in a deep reflection, not only on the very nature of influence strategies, but also on the appropriate method of communication for applying them.”¹²⁹

6.1.7. Articulation and Execution

Once convinced of the need for the concept of influence, one must decide on the mode of implementation. And that is where one encounters doctrine-related difficulties. Too many questions remain unanswered. Are IOs a discipline in their own right or are they only a function of integration? If they are a function of integration, what do they comprise? Psychological Operations? Everyone agrees. Public Affairs? No one agrees.

But, in the end, is it really important? From the moment that it works. And that is just the problem. We have to get a complex machine to work, a machine that plays on chords just as complex and especially varied, in a confusing context that is mingled with misunderstanding and mistrust.

For this reason, and as always, it is advisable to take a step back from things and redefine aims and expectations. What are we trying to do? “It is the final victory that matters, that of the new government’s stability. All the preceding battles must be designed backwards, without ever losing sight of the finality of the intervention: a peaceful state that is self-sufficient. Political planning is much more important than military planning.”¹³⁰ This means, then, that political and military entities must plan together, and that civilians and militaries must work together in the same direction. “Interactions between political and military operations are becoming so strong that one can no longer clearly separate them; on the contrary, all military operations must be planned taking into account their political effects, and vice versa.”¹³¹ Is this really the case, or do we have some progress to make?

This gives us a few starting directions: co-operation, planning, and coordination. “The relay race gives us a fairly good analogy of civil-military co-operation. Long before starting, we must study race charts together. Then, we must train together. During the event, we will have to run together for the time needed to properly pass the baton, without the preceding runner’s momentum being lost, this moment of passing taking on fundamental significance.”¹³² The need for such coordination has fortunately been made obvious by the failures we have been witnessing for the last eight years, in the Middle-Eastern theatres, probably due mostly to a blindness which has left the definition of the end state in a thick fog. Yet, “as soon as it is no longer about the logic of conquest, and the stated aim is political stabilization by and for the inhabitants, the matter no longer consists of “dividing and conquering” but “uniting to leave”. Again, we have to know and especially let be known what should and will be the status of the territory affected by the current operations.”¹³³

¹²⁹ *Ibid.*

¹³⁰ General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹³¹ David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

¹³² General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹³³ Roger Trinquier. *La Guerre moderne* (Paris: La Table ronde, 1961).

Make things known. Communicate. Inform. Influence. Use words and images. Use the ideas that they convey. Use force also, if need be, but not to destroy the adversary as, thirty years ago, we destroyed Soviet exercise divisions. Destroy the adversary in order to send a message. Just as the terrorist's aim is not to kill, but to question the legitimacy of the regime, the aim of physical destruction is to confirm that the cause of the insurgency has no future. If our blindness leads us to believe that the solution is the adversary's physical destruction, the awakening will be harsh. "Against this adversary, our firepower is futile, in itself. His resistance to losses is far superior to that of outside participants. For many reasons linked to demography and to aging populations, Western armies and even more so their public opinions can bear only minimal casualties. In contrast, adversaries from societies of vigorous demographics and young populations can withstand some bloodletting. The numbers are impressive because, in asymmetric conflicts, the ratio of human casualties' ratio between the two camps averages 1:82. The adversary in a probable war can therefore resist the physical attrition to which we will likely subject him certainly longer than we are able to resist the ideological, media-related and political wear that he inflicts upon us."¹³⁴ Of course, the use of force must be measured by its consequences; it must be precise, be limited to the targeted objective, and minimize if not exclude collateral damage, while being firm and decisive. It is an essential question of credibility, because dissuasion is primarily a matter of perception; the credibility of an intervention stems first and foremost from force, weapons power, and the dynamics of victory.¹³⁵ "The real strike becomes a formality: it confirms to the enemy that he can be hit, that he has already lost. His death becomes the redundant proof that he was already mentally dead: non-communication is equal to non-living."¹³⁶

I will not dwell on Psychological Operations and Deception amongst the tools and competences to be used. Others have done it and continue to do so much better than I could, and this remains at the tactical level. I would however like to dwell on two sensitive areas: propaganda and censorship.

"Censorship" is an ugly word. It goes against the duty to communicate and the fundamental freedom to know. "One notes, however, that terrorism is strengthened by the publicity that is made of it. There is thus a fine balance to strike between the required combat measures and a certain trivialization whose beneficial effect would be the devaluation of the terrorist act. If, by dint of courage, societies refuse to let themselves be disrupted or to come to live with the underlying idea of this scourge, it should make it even easier to prove its futility and hence speed up its eradication."¹³⁷ An unstinting analysis was made in a French daily newspaper in the aftermath of the Uzbin (Afghanistan) ambush of 2008. Media hype, and especially the reactions by authorities — deemed disproportionate — conveyed but one message to the adversary: continue killing the French. This works. If it were possible, "the insurgent would be at the mercy of prompt and strict censorship, because his first need is publicizing his actions."¹³⁸ But it is not possible. And that is fine. We must, however, consider a solution for controlling excesses by the media, especially during the most violent phases of engagements.

¹³⁴ General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹³⁵ *Ibid.*

¹³⁶ François-Bernard Huyghe. "Croire contre," *Croyances en guerre – Les Cahiers de Médiologie*, No. 8 (1999).

¹³⁷ General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹³⁸ David Galula. *Contre-insurrection – Théorie et pratique* (Paris: Economica, 2008).

Propaganda, *per se*, is often associated, if not with lying, at least to a certain manipulation of the truth — or possibly information — and is always understood as being aimed at allied populations. Let us not be so hasty as to judge it harshly and discard it prematurely. In everything, there are happy mediums. “Propaganda spreads: it supposes the dissemination of a body of positive beliefs, sometimes very simple (our cause is just, and we will win). Next, it has a breakout effect by pushing aside other beliefs: unlawful doctrines convictions, harmful affirmations, counter-values, negative effects, in short what they believe (or wish to make us believe) — anything which, by definition, is contrary to what we believe. Finally, while beliefs put up mental barriers, they strengthen tribal belonging. Its third dimension is the capability to draw connections, to gather, to unite us together in the heat of emotion and in shared faith.”¹³⁹ However, “Resorting to propaganda can be done be used occasionally. It will be beneficial only to inform, and not to mislead, opinion. The loyalist can therefore rarely mask the ineffectiveness or lack of policy with propaganda.”¹⁴⁰

Another area mostly ignored is that of chaplains and their relationships with Information Operations. The documents that explore them are scarce and the doctrines that integrate them are even scarcer. And yet, have our chaplains not shown more than once their ability to bolster the morale of our troops, to rebuild wavering motivation? And then, in the context of an uprising where religion is shown to be the main cause, would it not be logical for subject matter experts to have their say? At the operational level, it would be desirable to extend to Information Operations the chaplains’ functions and responsibilities, which are confined today to strictly religious support (RS). At the strategic level, the involvement of chaplains in establishing contacts and relationships with local religious authorities and/or with allied forces’ religious authorities would probably be very effective.¹⁴¹

6.1.8. Classification Model

Truth or lie? Enemy target or allied target? Which label best describes what? As we saw at the beginning of this essay, defining terms is a major challenge in the management and evolution of IOs. Awareness of the problem is acute and debates abound. Progress is small. Once again I fear that we may be a little too close to the problem and that it may be necessary to take a step back from it. After all is said and done, it does not matter what vocabulary is chosen, so long as we can all agree on the meaning of it. To distance ourselves is to comprehend the problem in its entirety. What we are referring to here is reporting information with a view to influencing an opinion, and consequently a decision and/or an action. What parameters could allow us to shape these communicative actions to turn them into a relevant segmentation?

Three variables come to mind: Truth or lie, nature of the target, and permanence of the desired effect.

Truth: All communicated information will, consciously or not, be on a Truth–Lie continuum. While those in Public Affairs cannot allow the truth to escape them, deception is built upon various forms of lies and trickery. “At the heart of information, it is advisable to isolate the peculiar meaning of relevance. This value is more delicate or complex to handle than that of the truth, because it belongs to

¹³⁹François-Bernard Huygue. “Croire contre,” *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999).

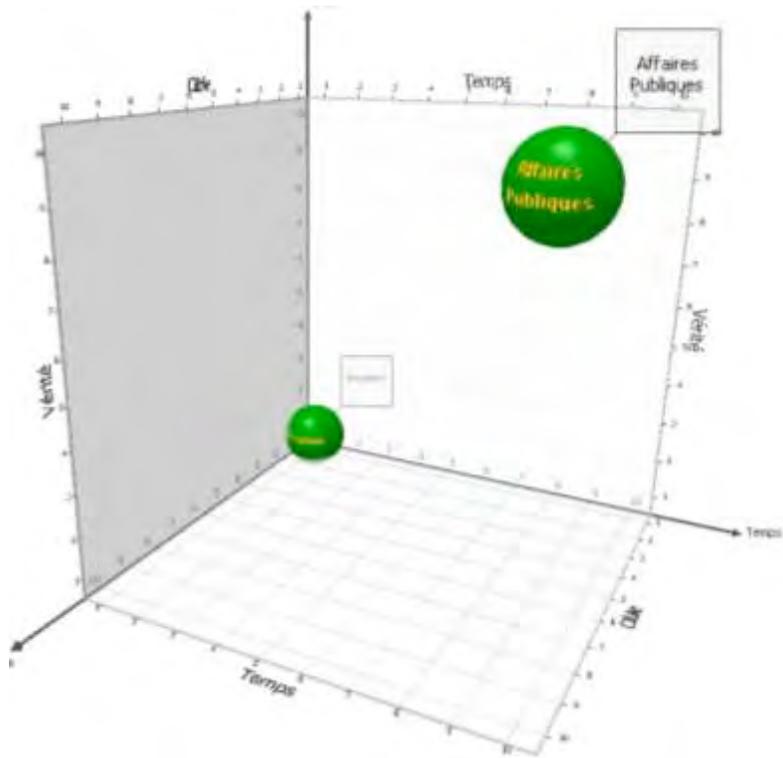
¹⁴⁰David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

¹⁴¹Chaplain (Colonel) David E. Smith. United States Army, *The implication of Chaplaincy involvement within information Operations*, US Army War College (2006).

pragmatism. Relevance gives information a turn of the screw, adjusting it to spatio-temporal, psychological, and social parameters: relevant information affects one individual here and now, and leaves another individual — or the same in other circumstances — indifferent.”¹⁴²

Target: Three major targets enable differentiation between allies, adversaries and neutral parties. In other words the blue, the red, and the green.

Permanence: Depending on the desired effect, the means available, and constraints, one will want or not want endurance in time. “When interventions set only negative goals (stopping a massacre, an aggression, a famine, a civil war...), they rarely have enduring, thus useful, effects: hence they must, from their inception, exceed this objective in order to establish a positive goal, that is to say seek to act for causes.”¹⁴³



The use of such a model should allow a classification of actions of information that would extend beyond labels and would depend on a common understanding of means and effects. And if words historically offend us or are difficult to use, why not replace them with codes or digits? Public Affairs, all about truth and meant for allies and in search of long-term effects, would be a “type 1 action”. Deception, based on duping the adversary for an immediate effect, would be a “type 2 action”. And so on, for all possible combinations.

6.1.9. Training

IO’s Achilles heel, training is too often the great forgotten item of doctrine. And yet, it is the essential step for the education of future generations of operators, as well as a melting pot of ideas and a forum for debate that will facilitate a permanent evolution and improvement of concepts, and of their applications. Indeed, “we can no longer be satisfied with ‘thinking of the adversary’: we must also ‘think like the adversary’. The latter is not impassive; he is not simply an object of planning; he is the ‘subject’ as well as the object, endowed with a free and creative spirit, with no intention to think like us or embrace our views. We truly have to put ourselves in the adversary’s shoes; facing Iraqi difficulties,

¹⁴²Daniel Bougnoux. “Les Balkans comme métaphore,” *Croyances en guerre—Les Cahiers de Médiologie*, No. 8 (1999).

¹⁴³General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

the English-speaking countries who understood this created 'red cells' within their operational staffs and developed courses where one was taught to think 'like the adversary.'" This can be achieved only at the cost of creating an appropriate curriculum and a constant effort to improve and evolve.

Training is often mistakenly thought of as being directed solely at IO operators and specialists. This reveals a total misunderstanding of the subject and of its very nature. In the field, all soldiers of all ranks and in all functions are operators of the informational field. This is why they all, absolutely all, must be trained accordingly. Just as we learn to shoot, we need to learn to talk, to smile, and to show our best profile to the cameras. It is imperative for the necessary change in culture. "Conventional military forces often struggle to adapt to counter-insurgency requirements. Generally, they have not been created, organized, and equipped for this type of war. This is the reason why the new United States Land Forces and Marine Corps doctrine manual¹⁴⁴, called *Counter-Insurgency*, proposes the need for learning and adapting as an essential condition for success in twenty-first-century counter-insurgency campaigns."¹⁴⁵

"Creativity is essential in the IO domain. Without creativity, IOs offer no support to our soldiers."¹⁴⁶

6.1.10. Difficulties and Challenges to Meet

The undertaking is not simple. Several challenges line the road to a coherent doctrine and effective management of a universally recognized and accepted IO engagement capability.

In civilian businesses marketing is hard-pressed to justify itself before financiers because they are often unable to precisely meet the need for increasing the return on investment. The same difficulty exists with Information Operations. "The relationship between the event and its psychological effects is hard to assess, including delays in realizing the latter. The irreducible period of psychological latency makes it impossible to imagine a rapid cascade of psychological effects in the same way that we could easily imagine a quick rhythm of material tactical actions against a conventional adversary."¹⁴⁷ This requires an internal effort of persuasion half-way between "Here are the results" and "Trust me."

Technology represents a major danger. Not technology in itself, in that it allows us to achieve, and is undeniable, but the temptation to credit it with all successes and consequently to make it the focus of attention and of investments. "In our probable wars, there is good cause to carefully control the potentially perverse effects of advances in information technology. In theory, the more the quantity of information grows, the better the knowledge should be; but this is not the case. The classic saying regularly confirms its validity: too much information kills information. In fact, the more information we have at our disposal and the more time we need to process it, the greater the risk of failure to distinguish differentiate the relevant from the useless, the significant from the futile, or simply, truth from falsehood. Certainty is much more a matter of understanding than of data. Yet, the multiplication of the latter demands a processing capability adapted to the analysis requirements on a timely basis. The current problem is less the lack of intelligence than its overabundance; the difficulty is the decision-makers'

¹⁴⁴David Galula refers here to the 1963 doctrine (author's note).

¹⁴⁵David Galula. *Contre-insurrection — Théorie et pratique* (Paris: Economica, 2008).

¹⁴⁶Mark H. Johnson. Director JIOWC, *IO Sphere* (Spring 2009).

¹⁴⁷General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

treatment and synthesis, because they come close to drowning in an overabundance of information.”¹⁴⁸ We need to clearly understand that technological capabilities do not entitle us to be intellectually lazy, and that upstream as well as downstream of decisions, the human mind reigns supreme. “The future is not technology; the future is the mind. Technology is only its vehicle. The history of war is not the history of technology: it is the history of men.”¹⁴⁹ It is therefore absolutely fundamental to differentiate the container from the contents. The idea is certainly not to deny technological advancement. “Enlightenment will not come from less technology — aside from the fact that the course of history cannot be reversed — but from a better human understanding of situations.”¹⁵⁰ In managing IOs, we must separate before regrouping and coordinating. Too often, everything is put into one basket — Psychological Operations, Influence Operations and Electronic Warfare, for example. We must never lose sight of the fact that technology is a facilitator, nothing more. It will never compensate for weakness of the contents. It is only once this difference is understood and accepted that reunification will be possible, for optimal management of coordination of means. “The most sophisticated technologies are not antagonistic but supportive of the most archaic imaginary projections: to destroy, rescue or communicate, we need not only guided missiles, humanitarian logistics and television crews; we also need motivating myths to inform, validate and coordinate their use.”¹⁵¹

6.2. To Decision-Makers...

...who decide today or will decide tomorrow the priorities of our development and the allocation of our resources, I would like to submit some further reflections:

There is much to be accomplished...

The primary major objective, without which nothing will be possible in the long term, is the evolution of culture. For this, we draw from John Kotter’s steps of Change Management.

Create a feeling of urgency. I believe that after eight years of stagnation, it should be there, but I am not certain that it is truly felt. It is therefore imperative that the message come from the highest level and that it be unambiguous: either change or disappear.

Create a team. It already exists. We are lucky to have, at all levels, bright minds who have understood the stakes and are ready to take up the challenges with enthusiasm. They must be identified, valued and granted the power to act. They will work miracles.

Create a clear vision. Vision is not what we want to realize. That is the mission. Vision is the expression of the way we want to be perceived in the future. And that is a field in which Canada obviously has a card to play and a great opportunity to seize. I feel Canada is able to position itself in the near future as THE world specialist in IO. We have the potential, much more so than our neighbours to the south, to develop knowledge, theorize ideas and give them form. In addition, it would be in line with the multicultural aspect of our society. I can very well see Canada being recognized as the world expert in the art

¹⁴⁸ *Ibid.*

¹⁴⁹ *Ibid.*

¹⁵⁰ Arnaud de la Grange and Jean-Marc Balencie. *Les guerres bâtarde* (Paris: Tempus, 2008).

¹⁵¹ Louise Merzeau. “Le devoir de croyance”, *Croyances en guerre — Les Cahiers de Médiologie*, No. 8 (1999).

and technique of implementation, management and coordination of Information Operations. Moreover, the investment, often opposed as an argument, is far from considerable. The total monies invested in the development of Psychological Operations capabilities since 2002 is less than the price of a battle tank.

Beyond the vision is the application. Around the initial team will need to be summoned the will of individuals. For that there must be motivation. And yet today what would motivate a military force member, whether he or she is a reservist or from the Regular Force, to devote himself or herself to IOs? Let us say it clearly: it would demand such enthusiasm that it would border on self-sacrifice and renouncing a career. Indeed, Information Operations are not a trade, period. And this is what is desperately missing. The consequences are disastrous. The capability is not properly developed. We are training generalists and not specialists. The ideal solution would be to recognize IOs as an integral part, and the possibility for a soldier to pursue them as a career. This could have the dual advantage of communicating a clear message regarding the importance they are given, and also of attracting and retaining talent. If this seems utopian for the near future, at least setting up centres of excellence would already be a strong message, and a step in the right direction.

We must also plan and plan in the long term. Today, all investments are made within the UOR — urgency operational requirements. Creating budgets and planning investments over the long term will also have the advantage of setting a strong message of credibility. There are multiple possibilities and opportunities for partnerships with universities. Indeed we have seen that we are in a field that is not exclusive to the military. The coordination of teaching with civilian universities can only strengthen the army-country relationship while ensuring the quality of teaching.

The management of this change must be firmly enforced and driven with finesse. “Strategic-level changes materialize when values are aligned and behaviours are modified to the extent that the culture of the organization adopts the proposed change and that the change becomes a ‘way of doing what we do’.”¹⁵² It is necessary to set up Change Management indicators to make sure we are making progress. What tangible indicators can be used to confirm that behaviours change and that IOs are becoming an integral part of our culture?

The Calendar Test: Monitoring the time devoted to developing and managing IOs.

Energy Test: Monitoring the degree of passion and enthusiasm deployed in the IO domain.

The Rhetoric Test: Monitoring the volume of conversations, physical and virtual, devoted to IOs.

The Resource Test: The most obvious. Monitoring the monies and talent invested in developing IOs.

“Don’t tell me what your values are; show me your budget, and I’ll tell you what your values are.”

The question often asked is “Can non-kinetic IO solutions become a core capability? The answer is unequivocally yes. However, values and beliefs influence behaviours, which then define the culture. This implies that a change in culture is required to transform IOs into a core capability. This will happen only after changes in behaviour. The way in which our decision-makers embrace change, demonstrate

¹⁵²David C. Akerson. “Information Operations as a Core Competency”, *IO Sphere* (Spring 2009)

their will, articulate their vision, and make their decisions will indicate the progress made in the right direction.”¹⁵³

¹⁵³ *Ibid.*

Conclusion

“It is our duty to prepare for tomorrow’s wars: those we will have to fight, and not those we wish to fight, because we know how to wage them. To this end we must deeply change our thinking patterns. We must think differently.”¹⁵⁴

According to General Desportes,¹⁵⁵ one of the great types of intervention for which we must prepare is the engagement within populations. “It will be by far the strongest occurrence and the longest intervention, because populations are from now on the major issue in interventions and because war, henceforth most often urban, is essentially waged amongst populations. In this type of intervention — the heart of probable war — we return to the truth of war, which is fundamentally a fight for freedom of action. It is the very essence of war. This means that the ultimate mission of war is to ‘control’. You may destroy, you may hit with precision, you may pulverize, you may cross the breadth of an entire country, you may overfly a territory for years, you may ‘nuke’ it, but if you do not ‘control’ it, it is all useless. You may control the skies and the seas, but if you do not control on the ground, at the heart of human societies, it is all useless. And to control, there has been only one solution since the beginning of time: if you want to control, be it on national territory or elsewhere, you must be present in great numbers in the physical environment where crises emerge, escalate and are settled, and this means on the ground.” It is physical presence, but not exclusively, at least not literally, limited to physical presence. It is also moral presence, and especially in the minds. It is often indeed a matter less of conquering space than of pacifying hearts, in order to gain the agreement of the population to the project we are putting forward. This is also worth the effort of the adversary who will strive to maintain only minimal effort in the military arena, where he knows he cannot win and, banking on time, will manoeuvre in other arenas of war, where we are vulnerable: the informational arena, the economic and financial arenas, and of course the political arena.

What we need to understand, and finally admit, is that political victory could henceforth be realized, sometimes, without a decisive military victory.

Influence replaces power.

This acknowledgement must imperatively lead us to make the necessary decisions, at the level of our organization and resources, to give us the means to acquire and maintain the essential know-how. “Full maturation and exploitation of 100 per cent of the entire spectrum of IO capabilities is now a military mandate.”¹⁵⁶

To this end, as we saw in previous chapters and in the light of history, we need more than a simple decision, even though everything starts from there. We must initiate a true shift in culture. And we know how difficult and intimidating that can be. Our political and military leaders must be convinced of the validity of this approach, strive to create a synoptic vision, and define clear directions. We must lift ambiguities by showing leadership. At all costs and as soon as possible, we must do away with cultural blindness and intellectual laziness that lead to easy hatred. We need to resist the easy temptation of

¹⁵⁴General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

¹⁵⁵*Ibid.*

¹⁵⁶David C. Akerson. Information Operations as a Core Competency, *IO Sphere* (Spring 2009).

contempt for others, which prevents us from understanding them and thus convincing them, which in turn shrinks the field of possibilities to just one — their physical elimination. If this were still necessary, then it has, over the last eight years, certainly shown its limitations.

“When faced with ongoing mutations, the temptation of ignorance is strong and reassuring.”¹⁵⁷

Yet, it is at the cost of this necessary effort that Canada will be able to take advantage of being one of the first countries to have understood and, in a timely manner, embraced the changes brought about by contemporary conflicts. Here is a true opportunity to build on a controlled multicultural soil, and on a foundation of universally accepted values, an expertise that the world will recognize as effective and relevant.

To turn down or reject this option would have catastrophic consequences. We could very well be tempted, for example, to use the announced withdrawal from Afghanistan in 2011 as an excuse to cut budgets and postpone the development of IOs to a later date or worse, never. This mistake would put us in the same position as nations that, in the past, had acquired this capability at the cost of many sacrifices, and which, having not maintained it, are forced today to “reinvent the wheel”.

Worse still, this would trap us in an uncontrolled spiral of solely kinetic actions. This would then become a descending whirlpool that could only lead to failure.

It is therefore imperative, without delay, to allocate the required budgets and to make decisions that will show the seriousness of the directional shift taking place. Specialization must become a weapon in itself to attract talent and offer career opportunities. Finally, it would be appropriate to develop a strong doctrine that would allow for the optimum use of assets offered by IO’s wide array of actions.

The tactical base is convinced and ready; especially those who acknowledge daily in Afghanistan the limitations of conventional engagement. The operational command is convinced and ready to think differently. Now it is now up to the strategic command to make decisions that will indeed show the will to exercise the cultural shift needed, which will allow Canada to take a decisive step towards understanding and resolving tomorrow’s conflicts.

Toronto, March 21, 2010

¹⁵⁷General Vincent Desportes. *La guerre probable* (Paris: Economica, 2007).

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