

# **Improving Information Operations with a Military Cultural Analyst**

**A Monograph  
by  
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## Abstract

Improving Information Operations with a Military Cultural Analyst by MAJOR Stephen C. Rogers, U.S. Army, 40 pages.

The concept and practice of using information as a tool in military operations to support political objectives has gained increased notoriety and emphasis within U.S. political and military arenas over the course of the last decade. Two particular publications of 2001, the *Quadrennial Defense Review Report* (QDR) and the United States Army Field Manual 3-0, *Operations*, highlight this fundamental shift in the growing importance of using information in warfare. Of particular importance, the 2001 QDR mandated that *information operations* be treated not merely as an enabling function, but as a core capability of future forces.

Recent military operations conducted during Operation Iraqi Freedom (OIF), however, indicate that the application of this newly christened element of combat power has fallen well short of desired effectiveness. While OIF produced stunningly rapid and decisive tactical and operational military successes it has yet to produce the post-conflict environment that was envisioned prior to the onset of hostilities. This, however, should not come as a surprise. The Army has spent the past three decades honing its lethal capabilities – the last half of which without a peer military competitor – at its combat training centers, gunnery ranges and simulation exercises. Yet this unmitigated focus on purely lethal means of influence has left the Army lacking the knowledge, skills, and trained personnel to shape the operational environment with non-lethal means such as information operations.

Without comprehensive changes in training, equipment distribution and personnel management, the Army will continue to struggle to employ information operations and fail to achieve the directives of the 2001 QDR. More importantly, the Army will continue to send soldiers into regions that could have been made far less dangerous with effective information operations. Fortunately, the Army has begun several studies in an effort to make the necessary changes to improve information operations. Yet none of the studies have focused significant attention on a model that very nearly replicates the intent and characteristics of information operations. International marketing and advertising agencies have developed effective organizational structures, techniques, and procedures to share their ideas with people across a vast array of cultures, all with the intent of inducing a predetermined action. Such practices offer the Army a model by which to examine its own organization and methods with an eye for improving the means by which it plans, prepares and employs information in warfare.

Studying these firms provide a wealth of knowledge regarding their emphasis on cultural considerations, organizational structure, and confidence in their subordinates. By gleaning the pertinent lessons from the international marketing model, the Army could greatly empower tactical and operational commanders with the tools necessary to better understand the culture of a country, region, or area of operations. Consequently, the Army stands to reap the same rewards that have been prevalent in international marketing for years – effective communication of culturally coherent themes and messages that lead to desired actions by a target audience. Such tools can be developed with relatively minor impact to existing force structures. The military has recently approved the creation of approximately 9000 new military intelligence positions, to be created over the coming few years, as a result of the transformation toward modularity. By recoding a portion of these intelligence analysts and training them to be cultural analysts, the Army could improve its ability to collect and analyze data on multiple levels – and greatly improve its ability to conduct information operations.

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## INTRODUCTION

*Ideas are important. Born or adopted in particular historical circumstances, they affect man's understanding of his world and, therefore, influence his behavior.*

– Richard M. Swain  
*Filling the Void: The Operational Art and the U.S. Army*

Standing atop the deck of the USS Abraham Lincoln on the first day of May 2003 before a banner that read “Mission Accomplished” President George W. Bush announced the end of major combat operations in Iraq, a mere six weeks after they had begun. In that speech, President Bush remarked, “The battle of Iraq is one victory in a war on terror that began on September the 11<sup>th</sup>, 2001 and still goes on.”<sup>1</sup> Over one and one half years later, however, many politicians, writers, and even some members of the Armed Forces were wondering to what victory the President was referring. Certainly the Iraqi military had been defeated and the regime of Saddam Hussein had been deposed. But the peace within Iraq that had been anticipated was yet to be secured, and American service men and women were still dying in an effort to win that peace.

The stunning tactical and operational successes of Operation Iraqi Freedom (OIF) that led to the rapid defeat of the Iraqi military, the occupation of Baghdad, and the fall of the regime are all clear indicators of the technical and tactical proficiency of U.S. Armed Forces on the modern battlefield. Yet, the inability to subsequently secure peace indicates a significant lack in the military's capacity to utilize all of its capabilities, both lethal and non-lethal, to link those tactical and operational successes to achieving national strategic objectives. In today's global environment where the United States enjoys unmatched conventional military capability it is crucial for military planners and commanders to look beyond the conventional lessons of the combat training centers and formal, written, lessons learned of past experiences. In a time where adversaries are using a vast array of unconventional techniques to overcome the disparity

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<sup>1</sup> George W. Bush, (President Bush presents a speech aboard the USS Abraham Lincoln, 1 May 2003) Full text of speech available at <http://www.washingtonpost.com/ac2/wp-dyn/A2627-2003May1>.

between conventional military capabilities, military leaders must be willing to glean lessons from a vast array of sources outside of the realm of conventional military wisdom. Broadening their base of knowledge in this way will help them better understand the cultural environment that their forces are immersed in, and subsequently will help them to employ all of the capabilities that are available to link tactical and operational successes to achieve strategic objectives. Major General Robert Scales, U.S. Army (Retired) wrote in September 2004, “This new era requires soldiers equipped with exceptional cultural awareness and an intuitive sense of the nature and character of war.”<sup>2</sup> While military leaders today certainly have an intuitive sense of the nature and character of *battle*, as evidenced by the stunningly rapid and decisive defeat of Iraq’s conventional forces, the struggle to secure peace has emphasized both a lack of cultural awareness, as well as a lack of understanding of the nature and character of war in the Middle East.

Operation Iraqi Freedom has, in many respects, highlighted how woefully inadequate the United States Army understands the role that culture plays in military operations. Despite a recent focus in producing a more “Joint and Expeditionary Mindset,”<sup>3</sup> the Army still struggles to employ non-lethal capabilities that rely heavily on a comprehensive understanding of the adversarial environment and the cultural aspects of the region, belligerent forces, and the indigenous population. One non-lethal capability which requires in-depth knowledge of the cultural environment and has received a great deal of negative attention since the end of major combat operations has been the use of information in warfare – referred to in military doctrine as *information operations* (IO).

## **Information in Warfare**

The concept of influencing another person’s actions by introducing information in an attempt to shape that individual’s perception has been with mankind throughout recorded history.

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<sup>2</sup> Robert H. Scales, “Culture-Centric Warfare,” *Proceedings*, September 2004, 33.

<sup>3</sup> Headquarters, Department of the Army, The Army Campaign Plan Brief (Washington, D.C., 2004), Slide 15, available at [http://call.army.mil/products/ACP/acp\\_brief.htm](http://call.army.mil/products/ACP/acp_brief.htm).



As technological advances have made sharing ideas through informational media a matter of more than mere spoken words, a vast array of techniques and capabilities have evolved to improve the ability to influence others to action. Such techniques are a very prevalent part of modern society. No matter what the daily activity, people are constantly bombarded with information in an attempt to change their perceptions and cause them to behave in a particular manner. From television and radio advertisements to Internet “pop-ups” and mass electronic-mailings to billboards, newspaper ads and opinion editorials, information, used as a tool to influence perceptions and invoke action are virtually everywhere.

The use of information to influence action has found a unique and persuasive place in conducting warfare. Throughout history, information has served as a means to impose one state’s will upon another. Historically, the United States Army has used information as a tool to influence enemy forces and shape the operational environment. To support Allied landings in Normandy on 6 June 1944, for example, the Army conducted psychological operations and military deception operations, creating the fictitious “Army Group Patton,” to convince German strategists that Allied forces would invade Europe at Calais instead of Normandy. The Army has a wealthy history of leveraging non-lethal means to influence people; whether disrupting enemy forces, influencing the decisions of enemy commanders, or persuading non-combatants to accommodate or assist in military actions, information has served an instrumental role in imposing U.S. military will.

The concept and practice of using information as a tool in military operations to support political objectives has gained increased notoriety and emphasis within U.S. political and military arenas over the course of the last decade. A great deal has been written on the topic of information in warfare, and the wide variety of interpretations of what constitutes the proper emphasis on and employment of information in military operations indicates that the entire subject is still quite controversial. At one end of the argumentative spectrum are those that believe that the use of information in warfare will revolutionize the way that American armed

forces will fight. These proponents of information operations tend to view information, in and of itself, as a weapon. At the other end of the spectrum are those that view information operations as merely a new label for those types of operations that the Army and other U.S. military forces have been conducting for years.<sup>4</sup>

This increased emphasis in the role of information operations and the subsequent controversy that has shrouded the appropriate role of information in warfare has resulted in arguably one of the most profound and controversial changes to Army doctrine in recent years. In 2001, the Army included *information* to the doctrinal elements of combat power. In doing so, the Army signified that a military unit could use information specifically as a “means of destructive or disruptive force.”<sup>5</sup> This single concept indicates a clear and fundamental shift in the Army’s perception regarding the importance of utilizing information as a means to influence the actions of others. While this inclusion might indicate that information can be used as a “weapon,” much akin to the revolutionary proponents of information operations, it does so with a clear sense of reservation. The Army’s doctrinal publication regarding the use of information in warfare states that information operations are “enabling operations that create and present opportunities for decisive operations.”<sup>6</sup> This clearly indicates that information operations must be used in conjunction with other military operations and serve to enhance the outcome of those other, decisive, operations. Information operations alone cannot serve as a “bloodless” answer to conflict resolution.

Yet, the 2001 Quadrennial Defense Review (QDR) identified information operations as one of six critical operational goals that focus transformation within the Department of Defense

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<sup>4</sup> Yulin G. Whitehead, “Information as a Weapon: Reality Versus Promises,” School of Advanced Airpower Studies, Air University, Maxwell Air Force Base, Alabama, June 1997, 7.

<sup>5</sup> Headquarters, Department of the Army, Field Manual 3-0, *Operations*, (Washington, DC, June 2001), 4-3.

<sup>6</sup> Headquarters, Department of the Army, Field Manual 3-13, *Information Operations: Doctrine, Tactics, Techniques, and Procedures*, (Washington, DC, November, 2003), 1-13.

(DOD).<sup>7</sup> Furthermore, the QDR required the DOD to treat IO “not simply as an enabler of current military forces, but rather as a core capability of future forces.”<sup>8</sup> This emphasis seems to usurp current Army doctrine, and elevates the realm of information operations to a new level of focus and importance. In response to the 2001 QDR, the Office of the Secretary of Defense initiated a study and produced the *IO Roadmap*. In a classified report, the study generated a series of recommendations to the DOD to facilitate information operations becoming a core military competency through effective policies and procedures; plans, operations and experimentation; and force development.<sup>9</sup>

Recent operations, however, indicate that the application of this newly christened element of combat power has fallen well short of desired effectiveness. Less than two years after the Army included information as an element of combat power, military operations were underway in Iraq in Operation Iraqi Freedom. While the operation produced a stunningly rapid and decisive tactical and operational military success it has failed to produce the type of strategic post-conflict environment that was envisioned prior to the onset of hostilities. While many might argue that this result is ultimately a political shortfall, others argue that it is entirely a result of the way in which the operation was conducted. Regardless of the root cause of the current environment in Iraq, there is ample evidence that the information environment was not afforded the attention that it demanded during the conduct of major combat operations. Lieutenant General William Wallace, the Commander of V Corps during OIF, agrees.

Regardless of what we had done, there still would have been an insurgency. My judgment, however, is that some of that fighting would have been less intense had some of the cooperation of the Iraqi people been more easily gained. Had we done better job earlier in the campaign, influencing with our ideas those same

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<sup>7</sup> Department of Defense, *Quadrennial Defense Review Report*, (Washington, D.C., 30 September 2001), 30.

<sup>8</sup> *Ibid.*, 38.

<sup>9</sup> Department of Defense, *IO Roadmap*, (Washington, D.C., October 2003), unclassified paragraph, 2.

Iraqi people, using the right techniques with the right cultural bias, we could have diminished the intensity of the insurgency.<sup>10</sup>

If information operations are to become a core competency of future military forces, and truly allow information to function as an element of combat power, it is imperative that leaders and soldiers at all organizational levels must learn to employ information, like any other capability, in the most efficient and effective way. Furthermore, IO must be employed in a manner that achieves the tactical and operational successes inherent in realizing strategic vision. In order for those successes to be realized, it is absolutely critical that the Army understand the crucial role that culture plays in the effective employment of information in warfare. Moreover, the Army must adequately structure the force to leverage the capabilities inherent in cultural understanding, the essence of information operations, to maximize its effectiveness on the battlefield.

Thoroughly integrating information operations as a core competency while the Army is engaged in the Global War on Terrorism is proving to be a phenomenal task. Not only must the Army learn and employ new skill sets, it must also overcome its own cultural perception of itself – its apperception – of being a kinetic, lethal force. To aid the Army in such wholesale internal change, it would be beneficial for leaders involved in managing and promoting this change to look beyond conventional feedback and learning mechanisms and consider the lessons learned and applied by organizations that already employ information as a means to influence perceptions in diverse cultural settings: international marketing and advertising firms.

## **Definition of Terms**

Part of the controversy and confusion that overshadowed the discussions regarding the proper emphasis and employment of information in warfare in the mid 1990s was resultant of the broad and varying definitions that were used to describe the term. Dr. Dan Kuehl, a professor at

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<sup>10</sup> Lieutenant General William S. Wallace, interview by author, 15 November 2004, Fort Leavenworth, Kansas.

the School of Information Warfare and Strategy at the National Defense University, explained in 1997 that the school had had a different definition of information warfare in each of the three years it had existed. He postulated that this constant variation in definition probably indicated a lack of conceptual certainty regarding its function within the realm of national security.<sup>11</sup>

Service doctrines now, despite minor inconsistencies, maintain a more cohesive description of information operations. The definitions accommodate both extremes of IO interpretation. They address those operations that have always focused on planting an idea within the mind of the adversary, but also convey new uses of technology to both protect and attack information and information systems in order to achieve unique effects in a modern manner. Below are listed the current doctrinal definitions in both the Army and Joint manuals that guide the planning and conduct of IO.

Source	Definition
Joint Publication 3-13, <i>Joint Doctrine for Information Operations</i> , (page vii)	Actions taken to affect adversary information and information systems while defending one's own information and information systems.
Field Manual 3-13, <i>Information Operations: Doctrine, Tactics, Techniques, and Procedures</i> , (page iii)	The employment of the core capabilities of electronic warfare, computer network operations, psychological operations, military deception, and operations security, in concert with specified supporting and related capabilities, to affect or defend information and information systems, and to influence decision making.

**Figure 1**

Much like information operations, cultural considerations have always been important in all forms of international relations – in times of both peace and conflict. Neither Joint nor Army doctrine, however, adequately address or place sufficient emphasis on the impact of culture in operations – particularly IO. In fact, in the current joint publication governing IO, *Joint Doctrine*

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<sup>11</sup>Dr. Dan Kuehl, “Defining Information Power,” *Strategic Forum*, no. 115, June 1997, available at <http://www.ndu.edu/inss/strforum/SF115/forum115.html>.

*for Information Operations*, all forms of the root word “culture” are referenced only four times; the army publication is only slightly better at fourteen. Moreover, current doctrine provides no concise definition of culture – perhaps mirroring Dr. Keuhl’s thoughts regarding information operations, in that cultural considerations may not have a clearly defined role in the realm of national security.

Joint doctrine does, however, reference culture with regards to multi-national coalition forces. “Much of the information and guidance provided for joint operations is applicable to multinational operations; however, differences in allied doctrine, organization, weapons and equipment, terminology, culture, religion, and language must be taken into account.”<sup>12</sup> This reference appears to indicate that religion, culture and language are all separate considerations; yet language and religion are crucial components of culture. Such a broad and imprecise use of the term prevents appreciation for the exactness of the concept and propagates confusion regarding its utility.<sup>13</sup> In order to provide adequate insight into the role of culture in information operations, a functional definition of the term is required.

Webster defines culture as, “the customary beliefs, social forms, and material traits of a racial, religious or social group.”<sup>14</sup> Similarly, sociologists view culture as a combination of beliefs, technology, norms, values and language shared by a group of people, or a nation.<sup>15</sup> Since the study or awareness of a culture is crucial in determining or evaluating how people will react within their environment, given certain conditions, it is important to describe how culture may be defined within a military context. Lieutenant Colonel James R. Trahan describes the essence of culture with regards to military operations as the “attributes of a given human group that offer

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<sup>12</sup> Department of Defense, Joint Publication 0-2, *Unified Action Armed Forces*, Washington D.C. 10 July 2001, IV-1.

<sup>13</sup> Lieutenant Colonel James R. Trahan, “Cultural Analysis: The Need for Improved Methodologies and Doctrine,” Naval War College, Newport, Rhode Island, 13 May 2002, 2.

<sup>14</sup> Merriam-Webster Dictionary, new revised ed., s.v. “Culture.”

<sup>15</sup> Christopher B. Doob, *Sociology: An Introduction*, (New York: Holt, Rinehart and Winston, 1985), 51.

insight and reveal critical factors with the potential to improve our probability of success while minimizing potential unintended reaction to U.S. activity.”<sup>16</sup>

The second type of “culture” that this monograph will discuss is the Army’s cultural perception of itself; how the Army views its own roles and functions within the realm of national security. Because an organizational culture define norms, behaviors and beliefs, and is rooted in the concept of self-reflection, this study will define *apperception* as “the mind’s perception of itself as an actor in its own state; a perception that reflects upon itself.”<sup>17</sup>

## **Scope and Methodology**

It has been widely publicized that information operations during OIF were, in large part, ineffective. This monograph will not debate this claim, nor will it spend a great deal of effort discussing specific incidences of how they were ineffective; these issues are merely symptoms of a greater problem. The corps commander responsible for successfully taking Baghdad during OIF identified the root of the information operations problem when he stated that, “I don’t think IO worked very well during OIF largely because *we didn’t understand it.*”<sup>18</sup> Subsequently, this monograph will attempt to determine why, as an organization, the U.S. Army does not understand information operations. Further, it will examine how the Army can better comprehend the nature and essence of information operations and, by way of analogy, consider techniques and procedures offered by the marketing industry as a potential solution to empower commanders to reap the full potential of this powerful tool in achieving their military objectives. Given the diverse nature of the information operations’ environment, however, as information operations are conducted at all levels of war, can be conducted continuously within an AOR, are both offensive and defensive in nature, and incorporate a multitude of capabilities and activities, it is necessary to limit the scope of this study in time, function, space, and in application.

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<sup>16</sup> Trahan, 2.

<sup>17</sup> Merriam-Webster Dictionary, new revised ed., s.v. “Apperception.”

<sup>18</sup>LTG Wallace interview (emphasis added by the author).

Since conceptual origins of this monograph were derived from the addition of information to the elements of combat power, and the application of the elements of combat power as a destructive or disruptive force, this monograph will narrow its scope to offensive information operations, with a specific focus on the doctrinal effect of *influence*. Army doctrine defines offensive information operations as “the integrated use of assigned and supporting capabilities and activities, mutually supported by intelligence, to affect enemy decision makers or to influence others to achieve or promote specific objectives.”<sup>19</sup> This definition is less restrictive in nature than the Joint doctrine concerning offensive information operations in that it deletes a sentence from the joint definition that lists IO elements associated with offensive operations. Thus, such a definition allows commanders to use all IO elements offensively. Correspondingly, Army doctrine goes on to describe how commanders can conduct offensive information operations across the full range of military operations throughout the spectrum of conflict.<sup>20</sup> These differentiations between Joint and Army doctrine, while not contradictory, clearly give the Army commander freedom of action to plan, resource and conduct offensive information operations.

While conducting offensive information operations, the commander attempts to seize and retain the initiative by creating a disparity between the quality of information available to friendly forces, and that available to his adversaries. Doctrinally, seven effects create this informational advantage: destroy, disrupt, degrade, deny, deceive, exploit, and influence.<sup>21</sup> This monograph will focus on the effect of *influence*. According to Army doctrine,

Influence is to cause adversaries or others to behave in a manner favorable to Army forces. It results from applying perception management to affect the target’s emotions, motives, and reasoning. Perception management also seeks to influence the target’s perceptions, plans, actions, and will to oppose friendly forces. Such targets may include noncombatants and others in the AO whom commanders want to support friendly force missions or not resist friendly force

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<sup>19</sup> Field Manual 3-13, 1-14.

<sup>20</sup> Ibid., 1-16.

<sup>21</sup> Ibid.



activities. Perception management achieves the influence effect by conveying or denying selected information to these targets.<sup>22</sup>

With an emphasis on influence, joint doctrine describes how offensive information operations that focus on the human element in an attempt to “affect the will of an adversary’s military forces to resist and to deny an adversary use of the affected populace for advantageous purposes,”<sup>23</sup> are typically conducted at the tactical level of war. This monograph will narrow its scope accordingly. This will allow the author to focus applicable recommendations to units operating at or below the corps level. According to Joint doctrine, a Service or functional component commander under a subordinate unified commander or Joint Task Force (JTF), by a subordinate JTF, or by a single-service force reporting directly to the Joint Forces Commander (JFC), may conduct offensive information operations at the tactical level of war.<sup>24</sup>

Narrowing the scope of the analysis in these ways, the author intends to propose that despite the fact that the relative importance of information operations has been elevated through the 2001 publications of the QDR and FM 3-0, *Operations*, the Army, as an institution, does not possess the expertise nor the appropriate allocation of resources to adapt its training and operational application of information operations. Subsequently, that Army cannot reap the full benefits of employing information operations in support of major combat operations. To support this claim, and offer a potential solution for addressing its implications, this study will first investigate why the Army does not understand, or possess the expertise to conduct effective information operations. Next, it will compare the common characteristics between information operations and international marketing and advertising, as each share the common goal of altering perceptions by conveying an idea in order to elicit a specific behavior. Once the similarities are established, this monograph will emphasize the importance of culture by identifying specific

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<sup>22</sup> Ibid.

<sup>23</sup> Department of Defense, Joint Publication 3-13, *Joint Doctrine for Information Operations*, 9 October 1998, II-11.

<sup>24</sup> Ibid.

cultural shortfalls in their application and the subsequent effect those shortfalls had on the outcome of the operations. Next it will address how international marketing and advertising firms overcame these kinds of cultural blunders, and consider the application of those lessons in relation to the elements of combat power. Finally, it will argue the importance of creating a new military occupational specialty (MOS) to support operations at the tactical level and allocating resources to those tactical commanders with the appropriate tools with which to plan, prepare, and execute information operations. These recommendations, drawn from the study of the international marketing and advertising community, will be compared with and shown to support the recommendations published in the *IO Roadmap*, the strategic directive published in 2002 from the Office of the Secretary of Defense.

## **EVOLUTION OF THE PROBLEM**

The idea of using American business concepts in support of information operations is not new. During the Vietnam War M. Dean Havron and his colleagues at the Human Sciences Research Corporation proposed that the Department of Defense adapt a psychological warfare methodology that modeled business practices prevalent in advertising campaigns. Their idea was to develop programs, themes and messages that matched the “ingrained value orientations” of specific audiences and the “selection of the most appropriate media for their expression.”<sup>25</sup> In essence, their recommendation centered on understanding the Vietnamese culture, and modifying psychological operations to account for their findings. Understanding culture was the cornerstone of their argument, as evidenced by the title of their 1968 publication, *The Use of Cultural Data in Psychological Operations Programs in Vietnam*.

Unfortunately, Havron’s ideas were granted little attention, for the American military apperception of that period – much like it is today – dictated that “victory in war means going on

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<sup>25</sup> Jefferson P Marquis, “The Other Warriors: American Social Science and Nation Building in Vietnam,” *Diplomatic History*, vol. 24, no. 1, Winter 2000, 99.

the offensive, finding and attacking the opposing forces, and applying maximum destructive power to the enemy's center of gravity."<sup>26</sup> The Army's obsession with destructive power, and subsequent dismissal of non-lethal means in conjunction with major combat operations is a result of the Army's methods of training and the organizational culture in the years preceding military operations in Iraq in 2003. The Army's training and culture are inherently inseparable. While the Army has developed a very efficient and productive method by which to train, it is the culture of the force that decides on what it should and should not train, thus determining how fully prepared the force will be to implement its doctrine in a time of conflict. Understanding this background will help to clarify why the Army has struggled to implement effective information operations, and equally informative in developing a means to develop solutions that overcome this shortfall.

### **The History of the Elements of Combat Power**

The Army's training imperative states that the primary mission of every member of the Army is to be trained and ready to fight and win our Nation's wars.<sup>27</sup> This imperative is inexorably linked to combat power because combat power is what makes up the Army's ability to fight. The elements of combat power have historically been a critical element in developing the means and methods of training. Prior to 1982, the doctrinal reference to combat power was typically a vague allusion to the number of combat systems that could be employed against an enemy. The 1976 version of FM 100-5, *Operations*, the precursor to the contemporary FM 3-0, defined combat power as a "concentration of force" in terms of combat systems as they compared with the enemy. It went on to describe that "all great Armies of the world rest their combat power upon the tank."<sup>28</sup>

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<sup>26</sup> Ibid., 100.

<sup>27</sup> Headquarters, Department of the Army, Field Manual 7-0, *Training the Force*, (Washington, D.C., October 2002), 1-1.

<sup>28</sup> Headquarters, Department of the Army, Field Manual 100-5, *Operations*, (Washington, D.C., 1976), 2-2.

In 1982, however, the Army expanded its definition of combat power to include specific elements that would implement the use of combat systems:

Combat power is relative, never an absolute, and has meaning only as it compares to the enemy. The appropriate combination of maneuver, firepower and protection by a skillful leader within a sound operational plan will turn combat potential into actual combat power.<sup>29</sup>

This definitional change provided the Army with observable means by which it could evaluate the effective employment of combat systems in both training and combat environments. For, doctrinally, it was the combination of these four elements that were to produce an effect that would overwhelm an enemy force.

Over the course of the past three decades the Army has gone to great lengths to improve its core capabilities in employing the elements of combat power. Understanding the value of training at multiple echelons, the Army created the Training and Doctrine Command (TRADOC) in 1973 to develop and manage revolutionary training systems. As one of the three pillars by which the Army could measure its readiness to carry out its wartime missions, training became an extremely crucial element in measuring change in the post-Vietnam War era. “Training is especially critical because it is the process by which the Army unites organized manpower and material resources within a doctrinal framework to attain levels of performance that can dictate the difference between success and failure in battle.”<sup>30</sup>

One core element of the training revolution was the establishment of the Army Training and Evaluation Program (ARTEP). This new performance oriented program for collective training required units from squad through battalion to perform to an established standard. ARTEP defined specific tasks, conditions and standards for unit training and decentralized its control by placing the responsibility for executing training programs directly with the unit

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<sup>29</sup> Headquarters, Department of the Army, Field Manual 100-5, *Operations*, (Washington, D.C., 1982), 2-4.

<sup>30</sup> Anne W. Chapman, *The Army's Training Revolution, 1973-1990, An Overview*, (Fort Monroe, VA: Office of the Command Historian, U.S. Army Training and Doctrine Command, 1991), 1.

commander. The program was structured to allow units to train as they would fight, evaluate the results of their training, and apply the lessons they learned to improve future training.<sup>31</sup>

Despite a new training method that stressed a cyclical learning process placed in the hands of the actual unit commanders, TRADOC senior leaders realized that unit commanders needed help in actually executing this new training model. Training at home station for battalion and brigade sized elements was severely restricted. Commanders were faced with the challenge of overcoming inadequate space to conduct maneuver training, a lack of battlefield realism, the need for an objective means of providing feedback on unit readiness and performance, and cost. Furthermore, as the Army looked ahead into the 1980s, these limitations would only magnify as the tempo, lethality, and size of the requisite maneuver space would all increase as new air and ground weapon systems were scheduled to be fielded.<sup>32</sup>

From these requirements, Major General Paul F. Gorman, then the Deputy Chief of Staff for Training, TRADOC, began to develop the concept for a national training center where armored and mechanized units could train in force-on-force maneuvers and conduct realistic live-fire training exercises.<sup>33</sup> Born of this concept was the Army's National Training Center (NTC), located at Fort Irwin, in California's high Mojave Desert, which opened its training area for its first rotation in October 1981. The initial success of the NTC paved the way for a similar site in Germany, the Combat Maneuver Training Center (CMTC), as well as a facility to train the Army's airborne, air assault, Ranger, special operations, and light infantry units in low to mid-intensity conflict at Fort Chaffee, Arkansas (later moved to Fort Polk, Louisiana) dubbed the Joint Readiness Training Center (JRTC).

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<sup>31</sup> Ibid., 7.

<sup>32</sup> Headquarters, Training and Doctrine Command, *Army Training Study Report Summary*, (Fort Monroe, VA, 8 August 1978), 7-14, as cited in Anne Chapman, *The Origins and Development of the National Training Center, 1976-1984*, (Fort Monroe, VA: Office of the Command Historian, United States Army Training and Doctrine Command, 1992), 5-6.

<sup>33</sup> Chapman, *Origins and Development of the National Training Center*, 9.

As a result of these training enhancements the Army became lethally proficient in employing the combined effects of their combat systems, despite the interruptions from training to participate in the military actions in Panama, Haiti and Grenada. This systemic approach to employing the elements of combat power to achieve massed effects were demonstrated in overwhelming fashion during Operation Desert Storm (ODS) in 1991. Fortunately for the forces that participated in ODS, the perceived “anomalous actions” of the previous decade had not impeded their ability to benefit from these training revolutions and hone their skills in applying the lethal elements of combat power prior to deploying to combat in Southwest Asia.

### **Culture and Training the Elements of Combat Power**

As alluded to earlier in this section, the Army focuses its training from a basic understanding of itself and as a reflection of its culture. According to Dr. Mary Jo Hatch, modernist cultural researchers tend to view an organization’s culture as a stabilizing force and often use the concept of culture to explain why an organization may be resistant to change.<sup>34</sup> When viewed in this light, the Army’s own culture is a significant contributor to the lack of focus on training non-lethal skills, such as employing information operations. In order to understand this phenomenon, it is helpful to understand how the Army’s perception of itself is formed.

The Army was created, and exists today, to accomplish certain missions within the realm of national security. When the Army is viewed as an organization, the fundamentals of organizational theory suggest that senior leaders within the Army perceive certain capabilities as more important than others to accomplish their established missions. Subsequently, the senior leaders in the Army articulate the essence of what the Army should be, and the capabilities on which it should focus. As a result, they attach a very high priority to controlling the resources that achieve these capabilities that support the essence of the Army, and demonstrate comparative

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<sup>34</sup> Mary Jo Hatch, *Organization Theory: Modern Symbolic and Postmodern Perspectives*, (New York; Oxford University Press, 1997), 358.

indifference to the functions and capabilities not considered essential to mission accomplishment.<sup>35</sup>

This cultural backdrop opens a door to understanding why the Army has not generally accepted the concept of information as an element of combat power, and information operations as a means to shape the operational environment. As Colonel Kevin Benson, the Chief of Plans for the Coalition Forces Land Component Command (CFLCC) during OIF, so bluntly put it, “I think we need to think about combat power differently; because there are still so many dinosaurs around, tying information to combat power is going to be a hard sell for guys whose reflex response is thinking in terms of tanks, TOWS [wire-guided anti-tank missile] and Dragons [anti-tank missile].”<sup>36</sup> Such a comment makes sense considering the Army culture in which these senior leaders grew up. These same leaders, from the Commander of Central Command (CENTCOM) on down to the lead planners, were all products of the late 1970’s and 1980’s that focused on employing the elements of combat power solely in a lethal manner, as discussed earlier in this section.

Unfortunately, these persistent ideas still permeate the Army today. These same senior leaders who still hold a deeply ingrained aversion to employing anything less than purely lethal effects are the same ones attaching high priority to manning and training on the conventional “flash-to-bang” weapon systems common to tactical-unit formations. As one military analyst observed:

The essence of the American army, in the eyes of career officers, is ground combat by organized regular divisional units. Although the American army tolerates the existence of sub-cultures that do not directly contribute to the essence of the organization, these peripheral organizations do not receive the support accorded to the army core constituencies of armor, infantry, and artillery. It is these combat arms that exert most influence on the way the army approaches conflicts.<sup>37</sup>

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<sup>35</sup> John A. Nagl, *Counterinsurgency Lessons from Malaya and Vietnam: Learning to Eat Soup with a Knife*, (Westport, CT: Praeger Publications, 2002), 4-5.

<sup>36</sup> Colonel Kevin Benson, interview by author, 16 September 2004, Fort Leavenworth, Kansas.

<sup>37</sup> Nagl, 6.

The focus in the latter half of the past century – as well as the first few years of the current one – has been on the destructive power of the military force; the culture of the organization has driven the Army to focus intently on “the essence” of the Army. By misinterpreting the reality of the global environment, and labeling such missions as Operation Restore Hope and Operation Just Cause as anomalies, the Army has missed an important component of its training requirement. While the author does not propose that the Army need lose sight of the ability to fight and win the “big wars” by wholly changing its training, force structure and culture – if that were even possible – the Army must adequately account for the requirements imposed upon it by the reality of the current global environment. Thus, the Army must take further steps to better prepare it for the contingencies that exist on the “other end of the conflict.” To be feasible, it must be a small, economical change that can leverage the essence of the non-lethal issues, such as those which focus on the cultural aspects of the threat environment.

## **FINDING A SOLUTION IN AN UNLIKELY PLACE**

Fortunately, the Army is attempting to learn from the early shortcoming of its information operations in OIF, and is taking steps to identify how to improve the effectiveness of information operations in the continuing struggle to stabilize the post-hostilities environment in Iraq. For five weeks in 2004, the Army dispatched a Combined Arms Assessment Team (CAAT) to objectively study and interview units that were deployed in Iraq. Its purpose was to observe what units were attempting to accomplish with information, assess what was or was not working, and to make recommendations on how to improve the effects the units were attempting to achieve. Likewise, in October of the same year, the United States Central Command (CENTCOM), assembled a diverse group of civilian analysts, military officers, and representatives from several government agencies at Carlisle Barracks, Pennsylvania – home of the Army’s War Collage and Center for Strategic Leadership – for a three day conference to further study the issues surrounding information operations.



The mission of the CENTCOM conference was to conduct mission analysis to identify problem areas within the organization that inhibit success in the IO battle space; recommend tactics, techniques and procedures; and recommend an organizational structure that would enable the integration, synchronization and overall supervision of the processes that support IO, to facilitate winning the war of perception.<sup>38</sup> The preponderance of the conference was spent in breakout groups, each manned by individuals of various organizations, educational backgrounds, and experience. Each group focused on a set of questions, posed by the representatives from CENTCOM, which addressed specific problems in organization and structure, synchronization, supervision, and marketing.

The focus of the group that considered the marketing aspect of information operations spent their time attempting to answer four distinct questions. 1) Who are the target audiences within the realm of information operations? 2) What objectives do the information operations want to achieve? 3) What media are available to disseminate the messages? 4) What specific techniques and procedures are available to employ those media to achieve the desired objectives? Interestingly enough, however, outside of a cursory discussion of outsourcing information operations functions to a marketing firm, the group did not once consider the techniques or procedures used by international marketing firms to achieve similar purposes. When questioned about the possibility of modeling the techniques of international marketing firms, one member of the group who had served in the Middle East and had a wealth of knowledge of the region, dismissed the idea. He argued that the jargon associated with developing marketing campaigns within a military context would likely pollute the process. He believed that the jargon would seep into the message that was produced and convey to the target audience that the message was attempting to “sell” them something that they had no desire or intention to buy.

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<sup>38</sup> Plenary Brief given by Tom Harris, Colonel, United States Army, United States Central Command at the United States Army War College, Carlisle Barracks, Pennsylvania, 19 October 2004, Slide 9.

While the response to the proposal appears to warrant some merit, the argument flies in the face of the tremendous successes that international marketing has enjoyed in expanding markets and distributing a vast array of products and services to all walks of life, all over the world. Unlike simple advertising – which is the promotion of a particular product, and a component of marketing – marketing is a holistic process that coordinates the functions of multiple activities, commonly referred to as the marketing mix.<sup>39</sup> In reality, marketing and military planning have a great deal in common. The Army’s planning process seeks to synchronize the activities of multiple combat and combat support systems to achieve an overwhelming *effect* on enemy forces at the decisive time and place. Similarly, marketing is a process that attempts to synchronize the efforts of planning and executing the conception, pricing, promotion and distribution of ideas, goods and services to create exchanges that will satisfy individual and organizational objectives.<sup>40</sup>

The Military Decision Making Process (MDMP) has served, and continues to serve, the Army well in developing plans and synchronizing operations that seek to achieve a wide variety of effects on enemy forces. It has been used to plan and execute operations spanning the full spectrum of military options available to the commander. The author does not propose that the United States Army engage in a wholesale adoption of planning models used by international marketing agencies. However, because international marketing techniques share many of the same characteristics and principles as information operations, analyzing the marketing process may provide some insight into how the military might approach information operations more efficiently and effectively.

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<sup>39</sup> Barbara Mueller, *Dynamics of International Advertising: Theoretical and Practical Perspectives*, (New York: Peter Lang, 2004), 22.

<sup>40</sup> Louis E. Boone and David L. Kurtz, *Contemporary Marketing*, 7<sup>th</sup> ed., (Fort Worth: The Dryden Press, 1992), 6.

## **The Marketing Model**

The process developed in the marketing industry has been tested and proven to work in achieving the very effect that information operations attempt to produce – changing relative perceptions to influence a target audience and elicit specific behavior. Therefore, it would be irresponsible not to study the marketing model within the context of understanding its characteristics, and which, if any, of those characteristics might be transferable to a military information operations setting. By analyzing the marketing process, military leaders can gain a better insight into their own processes for conducting information operations. In turn, appropriate analysis might help to identify potential shortcomings, and could possibly render recommendations for changes to organizational structure, command and control elements, and/or techniques and procedures. Potentially such analysis can help commanders to determine how best to employ the tools at their disposal or determine what other assets they need to shape the operational environment with information operations.

In fact, analysis of the elements of the marketing process – the target market and the marketing mix – provides the IO planner with two distinct tools by which to improve the planning and execution of information operations. First, the study of the marketing mix, the four components that marketers attempt to blend in order to meet the needs and preferences of a target group of consumers, provides a common framework by which to validate that military information operations achieve a synergistic effect on the target population. Second, the realization that all marketing activities focus on the target market – the group of consumers toward whom the firm decides to direct its marketing efforts – provides the military planner with a starting point by which to conduct research and analysis. This analysis will help military planners to ensure their themes and messages are appropriately structured to appeal to their target audience.

To understand how the marketing process provides a framework by which to achieve synergy, it is critical to understand the elements and activities that comprise the marketing mix, a

concept popularized by Jerome McCarthy. Commonly referred to as the “Four P’s” – Product, Place, Price, and Promotion – these categories represent the variables that marketing managers can control and manipulate. Careful integration of these factors help to ensure that marketers are able to satisfy the desires and needs of the customers in the target market. The following chart describes how marketing firms define each of these variables.<sup>41</sup>

Variable	Description
Product	In marketing, the word <i>product</i> means more than a good, service, or idea. <i>Product</i> is a concept that considers the satisfaction of all consumer needs in relation to a good, service, or idea.
Place	Place (or placement) decisions are those associated with channels of distribution that serve as the means for getting the product to the target customers; such as retailers and wholesalers. The distribution system performs transactional, logistical, and facilitating functions such as warehousing, inventory control, and order processing.
Price	Pricing decisions take into account profit margins and the probable pricing response of competitors. Pricing includes not only the list price, but also discounts, financing, and other options such as leasing.
Promotion	Promotion is the communication link between the seller and buyer. Promotion decisions involve advertising, public relations, media types, and in-depth cultural analysis of the targeted consumer audience.

**Figure 2**

Considering these variables, it becomes readily apparent that marketing is more than merely promoting and advertising a product or service. It is, rather, a comprehensive process that seeks to leverage all of the relevant factors of influencing a consumer to invest in the idea that the producer can meet his/her perceived needs. It also is apparent that none of the functions of the marketing mix can be considered alone, disregarding the effects or considerations of the other functions (See Figure 3). For instance, by ignoring place considerations, even the most well planned marketing campaign might fail. It would make little sense for a company such as John Deere to invest in a retail distribution center in downtown Manhattan, many miles from any farm

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<sup>41</sup> Boone and Kurtz, 22-26.

or field in which they would be used, or for Coppertone to run a promotional campaign in Anchorage, Alaska in the middle of December when the sun shines for a scant few hours each day.

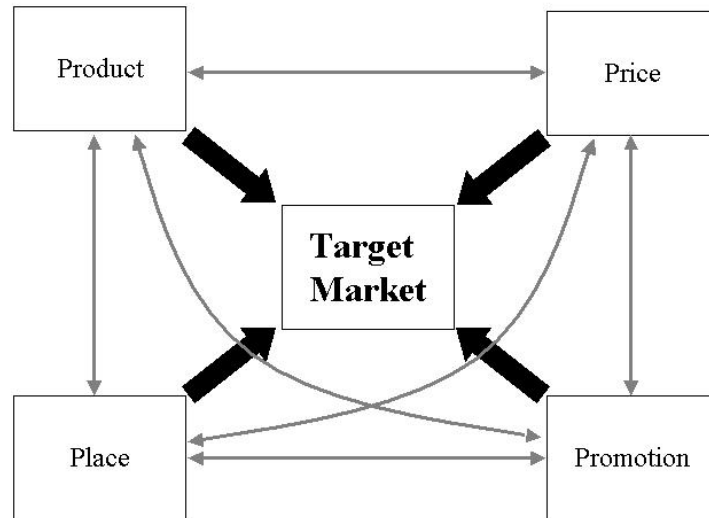


Figure 3

### Marketing and IO Commonalities

To achieve the level of sales that generates the maximum profit for his corporation, the marketer achieves synergy by attempting to identify and direct the optimal combination of all elements of the marketing mix at the appropriate market audience. These complimentary effects are of the same nature for military operations across the full spectrum of operations. In order to analyze the marketing model with the context of military information operations, it is helpful to identify how elements of an offensive information operation can be superimposed into the marketing mix model. By doing this, it is possible to visualize the similarities between the two processes.

Variable	Offensive Information Operations Elements
Product	The <b>idea</b> that the commander wants to convey to the target audience – it is the <b>themes and messages</b> of the information operation.
Place	The method of distributing and disseminating the message through a given <b>medium</b> that best suites both the product/idea and the target audience.
Price	The perceived cost, in terms of <b>benefits</b> lost, or benefits gained, from within the target audience when deciding whether or not the individual(s) will change their perception and act according to the desired behavior.
Promotion	The way in which the idea is <b>presented</b> according to its delivery method. The promotion accounts for the techniques involved with making the idea more appealing to the target audience. The <b>products</b> generated to deliver the themes and messages are the culmination of the promotional considerations.

**Figure 4**

The second commonality between the marketing process and offensive information operations is the idea that all activities are focused on a particular target audience. Just as all marketing activities focus on a target market<sup>42</sup> – the group of consumers toward whom the firm decides to direct its marketing efforts – offensive information operations focus on a particular target audience in which the themes and messages are intended to induce a specific reaction or behavior. Understanding how marketers direct their efforts at a very distinct group of individuals presents the opportunity to learn how marketing firms approach the problem of managing their marketing mix to achieve a specific effect. Analyzing these techniques within a military information operations’ context may allow military planners to better craft their themes and messages, and identify appropriate means of delivery, towards an appropriate target audience.

### **Marketing Strategy Techniques**

In the international marketing arena there are two basic approaches to developing marketing strategies. The first, *standardization*, relies on the premise that there exists an ever-growing pool of international consumers with similar tastes and desires. Such a world is supposedly emerging through tightly linked revolutionary advances in technology and

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<sup>42</sup> Boone and Kurtz, 21.

telecommunications that allow ideas and products to be shared across cultural barriers that once were closed by space and time.<sup>43</sup> This phenomenon of growing homogeneity is commonly referred to today as creating a “global village” – a phrase coined by Marshall McLuhan in 1967. This concept, popularized in economics by Harvard marketing professor Theodore Levitt, suggests that consumers everywhere desire goods and services of the best quality and reliability at the lowest price – that differences in cultural preferences, tastes, and standards are vestiges of the past as the world is becoming increasingly homogenized. This premise allows marketers to standardize their approach to the marketing mix, extending the idea of “one size fits all, everywhere” to the marketing of specific products.<sup>44</sup>

Many experts, however, disagree over the extent to which firms should standardize their marketing programs. Marieke de Mooij, author, associate professor and president of her own consulting firm in the Netherlands disagrees with the concept of an emerging global market. She argues that those who believe in a future that exists of one global culture are deluded by paradoxes that make the values of one culture apparently similar to those of a vastly different culture. In what she terms the “global-local paradigm,” she presents a paradox that states, “One cannot think globally; every human being thinks according to his or her own culturally defined thinking patterns.”<sup>45</sup>

Those that concur with Ms. De Mooij typically subscribe to the second approach to developing marketing strategies, *specialization*. Companies that specialize tend to tailor the elements of the marketing mix to account for the differences between their customers in various foreign markets. By studying their respective target markets, they believe that because consumers and marketing environments differ so greatly between regions and countries that it is

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<sup>43</sup> Barbara Mueller, *International Advertising: Communicating Across Cultures*, (Belmont, CA: Wadsworth Publishing Company, 1996), 24.

<sup>44</sup> Ibid.

<sup>45</sup> Marieke de Mooij, *Global Marketing and Advertising: Understanding Cultural Paradoxes*, (Thousand Oaks, CA: SAGE Publications, 1998), 12.

necessary to account for those differences in their marketing campaigns. While such customized approaches to marketing inherently result in greater costs, these marketers invest accordingly in hopes that greater monetary returns and a larger share of the foreign market will offset the costs.<sup>46</sup>

The significant common denominator between both schools of thought concerning marketing strategies is the role that culture plays in each decision. While proponents of standardization claim that cultural differences are diminishing to a point that they bear very little impact on the decisions to market their products, proponents of specialization consider cultural differences the key factor in developing their strategies. So important is this factor of culture that both Marieke de Mooij and Barbara Mueller dedicate multiple chapters in each of their works to understanding the role of the cultural environment in developing marketing strategies. Moreover, other writers such as Simon Anholt, author of *Another One Bites the Grass: Making Sense of International Advertising*, dedicate much of their work to defining the effect of the cultural environment on international marketing and advertising. It is interesting also to note that those who offer data in support of standardization are resolutely silent with regards to marketing techniques in the Middle East – indicating that the cultural differences are so vast that even supposing marketing campaigns in that region of the world would lend damning evidence to their argument.

In the defense of those marketers who advocate standardization, many authors, such as Barbara Mueller, acknowledge that this type of strategy is appropriate for a very specific set of products. The numbers of firms with the potential to standardize the majority of their marketing mix elements, however, is extremely limited.<sup>47</sup> Thus, for the vast majority of businesses, adapting their marketing strategy to account for the cultural differences between market audiences is crucial to their success. One need not look far to identify a host of marketing blunders that failed to associate their marketing mix to the cultural aspects of their target market.

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<sup>46</sup> Mueller, *International Advertising: Communicating Across Cultures*, 24.

<sup>47</sup> Ibid.



One comical example involves the American Dairy Association. For a number of years the Association had enjoyed tremendous success with the “Got Milk?” campaign. When it was decided to extend the ads south of the border into Mexico, the advertisements turned up dry wells. Unfortunately, the Spanish translation of the popular American slogan rendered a not so appealing, “Are you lactating?”<sup>48</sup>

Marketing mistakes are not solely tied to translation errors, however. They run an entire gamut of considerations from colors, numbers, symbols and non-verbal innuendos across all aspects of perceived cultural needs, desires and practices. In a marketing blunder related to the Islamic faith, Nike developed a shipment of shoes that featured a logo that closely resembled the word “Allah” in Arabic script. When Nike’s eastern European office discovered that the logo might be insulting to Muslim consumers, they immediately set out to change the logo. Yet, despite Nike’s claim that the logo was meant to look like flames, and the fact that the logo was changed well before the shoes ever hit the market, the Islamic Council was still successful in loudly criticizing the product.<sup>49</sup>

While such examples might appear humorous in retrospect, the fact still remains that such uneducated decisions cost these companies – and countless others that have made similar mistakes – a great deal of money, prestige, and market share. While some mistakes are easy to recover from, others may leave companies out several millions of dollars in both lost funds and revenue potential. Fortunately for businesses, when marketing mistakes are made the loss is ultimately only monetary. When similar mistakes are made during the execution of information operations the results can be far more catastrophic than the loss of mere dollars. Such oversight in the planning and execution of information operations might actually steel the resolve of belligerents or create an opportunity for rival factions to find a thread of continuity and consolidate their efforts against U.S. actions. Such consequences can lead to a much-less

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<sup>48</sup> Ibid., 118.

<sup>49</sup> Mueller, *Dynamics of International Advertising*, 126.

manageable operational environment that can ultimately result in a greater number of casualties for American forces.

## Commonalities Applied

Earlier in this section several commonalities were identified between the marketing process and information operations. In order to apply those common ideas, it is important to understand at what level in each organization decisions are made. This determination will help define at what level within a particular organization the process can be influenced. By revisiting the chart that identifies the similarities between the marketing mix and information operations, it is possible to assess where decisions are made, and at what level assets are controlled that influence those decisions within the Army (See Figure 5).

Variable	Offensive Information Operations Elements	Decision
Product	The <b>idea</b> that the commander wants to convey to the target audience – it is the <b>themes and messages</b> of the information operation.	Strategic Decision
Place	The method of distributing and disseminating the message through a given <b>medium</b> that best suites both the product/idea and the target audience.	Strategic Decision
Price	The perceived cost, in terms of <b>benefits</b> lost, or benefits gained, from within the target audience when deciding whether or not the individual(s) will change their perception and act according to the desired behavior.	Strategic Decision
Promotion	The way in which the idea is <b>presented</b> according to its delivery method. The promotion accounts for the techniques involved with making the idea more appealing to the target audience. The <b>products</b> generated to deliver the themes and messages are the culmination of the promotional considerations.	Operational and/or Tactical Decision

Figure 5

FM 3-13 describes how the President, combatant commander, joint forces commander or appropriate ambassador is the approving authority for themes and messages.<sup>50</sup> Furthermore, most delivery means – save tactical psychological operations teams – are managed at or above the corps level. Thus, within the construct annotated above, the *product* and *place* aspects of the

<sup>50</sup> Field Manual 3-13, 2-4.

marketing mix are both firmly fixed and controlled at the strategic level. FM 3-13, however, goes on to state that commanders subordinate to Combined Joint Task Forces (CJTF) may modify products, within guidelines issued by the higher headquarters, in order to better target local audiences.<sup>51</sup> With this knowledge, then, it is appropriate for tactical commanders to influence the *promotion* aspect of the marketing mix. With this in mind, the remainder of this monograph will focus its attention on how better to promote the themes and messages through effective products that are targeted at a specific audience.

### **The Marketing Approach to Promotion**

According to Barbara Mueller, advertising's goal is to generate awareness, interest, desire, and ultimately action.<sup>52</sup> When a company embarks on a promotional campaign with consumers of a foreign market, one of the first decisions that must be made is how to organize the promotional functions to effectively advertise their product. The range of options varies from complete control by the parent company to autonomous decision making by the local, or tactical, foreign offices. One particularly effective technique, termed *pattern advertising*, centralizes the “what” of the campaign – the themes and messages of the advertising – and localizes the “how” – the advertising products that are distributed within the target market.<sup>53</sup> Given the constraints and freedoms afforded to commanders in FM 3-13, as outlined above, this particular technique of pattern advertising offers a promising model, as the decisions regarding promotion lie at the same level of command within each organization – at the local, or tactical level.

The inherent strength of decentralization lies in the fact that promotional programs can be tailored to the specific needs of a given foreign market. Local managers may be perceived as having a greater understanding of the foreign market than their distant supervisors and thus, based on their in-depth knowledge of the cultural environment that makes up the target market, they are

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<sup>51</sup> Ibid.

<sup>52</sup> Mueller, *International Advertising: Communicating Across Culture*, 121.

<sup>53</sup> Ibid., 122-123.

better equipped to make necessary modifications to the advertising campaigns. The philosophy behind this approach, according to Christopher Bartlett and Sumantra Ghoshal, is that the local offices in foreign markets should not merely be “pipelines to move products,” rather, “their own special strengths can help build competitive advantage.”<sup>54</sup>

By empowering managers and planners at the local – or tactical – level, corporations attempt to leverage the cultural knowledge of their subordinate leaders to better relate their products to the target consumer market. By entrusting those who are immersed in the local environment with the ability to manipulate and modify the promotional products, the company leadership is attempting to overcome the cultural gap between the producer and consumer, and avoid subtle promotional mistakes that can lead to catastrophic marketing failures.

Much like their civilian counterparts, the military would be well served to empower their tactical commanders. Unfortunately for American military forces, however, local commanders operating at the tactical level often have just as little cultural knowledge of their areas of operation as do the commanders at the operational and strategic level. While it is arguable that the longer a unit remains within a geographic region the members of the command will become more attuned to the cultural nuances of the indigenous people, the time that it takes to become sensitized to such considerations may well take too long to create an impact through the use of information operations. Unlike their civilian counterparts, military commanders typically have to work in an operational environment where they have not had the benefit of years of experience in the “local market.” Without prior knowledge of the cultural environment, and appropriate adjustments made to the presentation of the themes and messages, irreparable damage may be done before the commanders make the necessary adjustments to their information operations.

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<sup>54</sup> Christopher A. Bartlett and Sumantra Ghoshal, “Tap Your Subsidiaries for Global Reach,” *Harvard Business Review*, November/December 1986, 87-94.

## RECOMMENDATIONS

In order to achieve success in information operations – to influence a target audience, whether that be adversarial leaders or a local populace – the Army must comprehend “the intricacies of [a foreign] psyche – the tribal loyalties, the stubborn sense of national pride, the painfully learned distrust of America’s promises,”<sup>55</sup> – in short, they must understand the cultural environment that drives the target audience’s decision making process.

Returning for a moment to the elements of combat power, it has been argued that there exists one crucial element that governs the ability of a force to effectively employ a given element against the enemy. When utilizing *firepower*, for example, the physical attributes of each particular type of round determine how, when and where it can be employed. Its maximum effective range, trajectory of flight, burst radius and type of explosive dictates the use of the round. During *maneuver*, the terrain dictates what type of force or vehicle can traverse a particular geographic region. In information operations, culture is the critical factor. Characterizing the relationship of one to another, the proponent chief of information operations at the Combined Arms Center, Fort Leavenworth, Kansas, “culture is to information operations, as terrain is to maneuver.”<sup>56</sup>

Yet, the Army is not prepared to account for that one critical element that influences the ability to enhance the use of information within the realm of military operations. For the very reasons outlined in section two of this work, the Army’s focus for the past thirty years has been on the destructive capabilities of its combat power. If the Army is to achieve the effects it desires from information operations, and make the use of information a core competency of future forces, changes must be made to allow Army forces to better understand the cultural environment in which information operations will be conducted.

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<sup>55</sup> Major Norman Emery, “Information Operations in Iraq,” *Military Review*, May-June 2004, 13.

<sup>56</sup> Lieutenant Colonel Charles Eassa, interview by author, 29 September 2004, Fort Leavenworth, Kansas.

At the strategic level, there currently exist two assets that provide cultural insight into a target culture: Strategic Studies Detachments (SSD), and the Foreign Area Officer (FAO) Program. SSD exist within the Regional Support Battalions of a Psychological Operations Group. Staffed by civilian analysts, they produce studies for their respective regional combatant commanders. The FAO program provides a cadre of highly educated and experienced individuals to augment key staffs and “provide specialized expertise concerning political-military considerations in support of senior Army and national decision makers.”<sup>57</sup>

Foreign Area Officers and other regional experts – such as those serving within SSD – can relate to both the U.S. military culture and the targeted culture. They provide invaluable expertise in interpreting cultural influence on a targeted audience’s behavior, and how those influences can improve military operations. However, they are extremely limited in both numbers and accessibility below the strategic level. Major commands may be adequately staffed, but many operational and significant tactical units will never see such expertise integrated into their staffs.<sup>58</sup> If commanders at the tactical level are to be able to integrate the knowledge of the cultural environment into their information operations to effectively communicate with, and influence, a particular target audience, it is essential that they be resourced to collect, analyze, and apply cultural information at their level. Commanders at this level require analysts, within their organization, who can understand and translate the cultural aspects of their area of operations into intelligence that will maximize the effectiveness of their information operations.

## **Conceptual Tools**

Returning once again to the elements of combat power, it may be helpful to analyze the current capabilities at the tactical level. As described earlier, for the element of *maneuver*, terrain is critical component that determines maneuverability within a geographic region. In addition to

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<sup>57</sup> Headquarters, Department of the Army, Department of the Army Pamphlet 600-3, “Commissioned Officer Development and Career Management,” (Washington, D.C., 1 October 1998), 262.

<sup>58</sup> Trahan, 12.

computer programs, such as *Falcon View* and *Terabase*, which help staffs at the tactical level to interpret the effects and influences of terrain on military operations, there also exists a military occupational specialty (MOS) whose primary function is to provide analysis regarding the impact of terrain. The topographic analyst, who typically resides in the Topographic Engineer Company of the Corps Engineer Brigade, is routinely deployed as a member of a terrain analysis squad. These squads provide “personnel and equipment to army, corps, division or other headquarters, as directed, in support of terrain analysis/intelligence producing missions.”<sup>59</sup>

Not surprisingly, many soldiers in tactical units have grown to have a great appreciation and understanding of the effects of terrain on military operations. Through focused training and practical application, effective modeling tools such as *Falcon View* and *Terabase*, as well as innovative and useful products developed by topographical units, soldiers in tactical units have honed their abilities to conduct terrain analysis to a very formidable skill. Equally unsurprising is the fact that these skills were developed through decentralized control of the training methodologies and resources. Much like the approach taken by international marketing firms, unit commanders were entrusted with the responsibility, time, and a vast array of resources to achieve proficiency not attainable through centralized control.

This same approach of decentralized execution, empowering tactical level commanders with the necessary tools, can work within the realm of information operations as well. Lieutenant General William Wallace agrees:

I’ve been in the Army for 35 years, and everywhere I’ve gone, centralized planning and decentralized execution just works...my judgment is that if you centralize planning and decentralize execution, things generally work. Now that also applies, in order to execute [in a decentralized manner], you have to give the guy at that level some tools with which to execute, which is another part of the problem, I think, with Information Operations. Initially in OIF, we were doing centralized planning and centralized execution so guys that were in direct contact

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<sup>59</sup> Federation of American Scientists, Military Analysis Network, US Army Table of Organization and Equipment, Engineer Company (Topographic)(Corps), available at <http://www.fas.org/man/dod-101/army/unit/toe/05608L000.htm>.

with the people and in the best position to influence them did not have any means with which to send a message.<sup>60</sup>

The intent of information operations requires that commands be resourced to do more than merely transmit the themes and messages to the target audience; they must be equipped with a message that can be received and understood by that target audience. That message must be culturally adapted to incite the target audience to act in a manner congruent with the command's tactical and operational objectives. Thus, if the tactical commander is to have *all* of the resources he requires to implement effective information operations, he must have the ability to understand the cultural environment in which he operates. The international marketing community has come to this same realization. They have inundated their advertising staffs with host nation personnel who are already familiar with the regional and local aspects of the cultural environment. Without the ability to rely on the exact same method, the Army must devise a means by which to retain cultural understanding of various environments at all levels within the organization. It needs to retain such knowledge not merely the strategic, like it currently does, but also at the tactical level, where it is optimal to conduct the operations. Thus combining the lessons of the international marketer with the historical precedence of the topographic analyst, it is fitting to consider the idea of creating a military occupational specialty (MOS) that exists to conduct cultural analysis – a tactical level *cultural analyst*.

## **Recommendation**

Based upon the preceding discussion, the ability to influence a target population within the realm of information operations is dependent upon three specific recommendations. First, the Army should develop an MOS – the cultural analyst – that will serve in units that operate at the upper tactical and operational level of war. Second, the Army should develop an integrated network that links these cultural analysts with their counterparts at the strategic level (FAO/SSD).

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<sup>60</sup> LTG Wallace interview.



This will allow leaders at all levels to share information through common databases and resources that provide relevant, timely and accurate information about regional cultural considerations with specific analysis regarding their impact on military operations. And finally, the Army should improve the distribution of tactical psychological operations assets to division and brigade level commanders during major combat operations: teams, printing and production capabilities, and other means of broadcast and distribution. This will allow commanders the ability to act upon their improved knowledge of the cultural environment. Additionally, they will have the ability to produce and disseminate products that meet the themes and messages developed at the strategic level. Moreover, those themes and messages will be adapted to the specific cultural environment of their tactical operations.

The benefits that can be realized from these recommendations are threefold. First, all three recommendations will better enable tactical commanders to execute information operations at the time and place that best suits influencing a target population. This form of decentralized operation is congruent with current Army doctrine, which stresses, “rapid, agile operations based on exercising disciplined initiative within the commander’s intent.”<sup>61</sup> Because situational understanding of the local environment is so critical to the timing, means, and methods by which an operation is conducted, decentralized operations have become central to way the Army trains and fights. Moreover, as so aptly put by LTG Wallace, “it just works.”<sup>62</sup>

Secondly, adopting these three recommendations will send a very clear message to the Army. I will display a quantifiable commitment to the importance and potential of information operations. While on the surface this appears to be a trite result, it is, in fact the most important one. Previous discussion in “Evolution of the Problem” section of this monograph described how deeply ingrained the essence of an organization can become. In the Army, this phenomenon has evolved to the point that it adversely affects the Army’s ability to see beyond the realm of

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<sup>61</sup> Field Manual 3-0, 2-22.

<sup>62</sup> LTG Wallace interview.

kinetically based, lethal operations. So strong is the organizational culture that has come to rely almost entirely on lethal methods, that Colonel Benson indicated that, without some form of major intervention, time would be the only factor that could overcome the current reluctance to invest in the idea of information operations.<sup>63</sup> Unfortunately, the Army does not possess the luxury of time to allow natural cultural change to run its course. These top-driven changes, however, can provide that major intervention to begin changing the Army's apperception and the corresponding essence that drives senior leader decisions regarding training and resources.

Finally, these three recommendations will empower the Army to meet the 2001 QDR directive to make information operations a core capability of future forces. Each recommendation, in turn, helps to achieve the recommendations outlined in the *IO Roadmap*.

1. Peacetime Preparations – DOD's IO concept should emphasize that full spectrum IO are full-time operations requiring extensive preparation in peacetime.<sup>64</sup>

By providing commanders at the tactical level with soldiers whose sole purpose is to analyze the cultural environment and provide recommendations about how to influence that culturally sensitive operational environment with information, the Army would establishe the full-time nature of information operations. By enabling tactical commanders cultural connectivity with the assets afforded the regional combatant commanders, assessment is continuously updated and commanders more fully understand the particular region in which they operate. Because these cultural analysts work for the commander and are not centrally controlled at the strategic level, tactical commanders could focus their efforts to understanding local populaces and sub-cultures within a given region, and maintain currency within their projected areas of operation.

2. Enhance and Refocus PSYOP Capabilities<sup>65</sup>

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<sup>63</sup> COL Benson interview.

<sup>64</sup> IO Roadmap, unclassified paragraph, 8.

<sup>65</sup> Ibid., 26.

- a. Improvements in PSYOP capability are required to rapidly generate audience specific, commercial-quality products into denied areas.
- b. Future operations require that PSYOP focus on aggressive behavior modification at operational and tactical levels of war.

At first glance, some might argue that this recommendation might easily be addressed by merely improving PSYOP team training and outfitting the teams with greater print and publication equipment. Yet, it is important to recognize the key operative terms in this recommendation: *rapidly*, *audience specific* and *operational and tactical levels of war*. First, the further removed critical assets and capabilities are from the tactical environment, the longer it takes to employ those critical assets. The Army's reliance on decentralized execution indicates a keen reliance on the timing of the operation. If critical assets are centrally located above the tactical level, they will not be able to *rapidly* generate the products required to achieve a desired effect. Moreover, it is critical that the products, if they are to be effective, be culturally sensitive to the target audience. Without a keen understanding of the nature of the cultural environment, it matters not how quickly the message is received. If a message is not culturally sensitive it will not be understood nor influence the audience to actions congruent with tactical and operational objectives. Cultural analysts, coupled with production and distribution capabilities located at the tactical level, provide the surest means by which to meet the intent of this recommendation.

3. Identified Need to Improve PSYOP – Current campaigns are reactive and not well organized for maximum impact: PSYOP must be refocused on adversary decision making, planning well in advance for aggressive behavior modification during times of conflict. PSYOP products must be based on in-depth knowledge of the audiences decision making process and the factors influencing his decisions, produced rapidly at the highest quality standards, and powerfully disseminated directly to target audiences throughout the area of operations.<sup>66</sup>

This recommendation reemphasizes several key points that have already been made within the context of this monograph's recommendations. If the effects are intended to focus on adversary decision making commanders and planners must have an in-depth knowledge of the

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<sup>66</sup> Ibid., 6.

decision making processes that adversaries use. Correspondingly, commanders and planners must have detailed information regarding the cultural aspects of those adversarial decisions cycles well in advance of the operation. This can only be accomplished with dedicated resources at the appropriate organizational level conducting the operations – at the tactical unit level. By empowering tactical units with the capability to analyze, produce and distribute products that are modified within the appropriate guidance that supports strategically approved themes and messages, it is possible to more effectively achieve the desired effect on the target population

### **Passing the FAS Test**

The benefits of these three recommendations indicate that they are indeed suitable to meet the perceived needs of the force, and acceptable to meet the requirements directed by the 2001 QDR. The real litmus test, however, is feasibility. Arguably the most difficult of the three recommendations to implement would be to create a new MOS and generate the manpower to fill its ranks. Even proponents of the idea seem to think “the Army will never resource [an MOS of cultural analysts] to the degree that it needs to be resourced.”<sup>67</sup> Yet, with minor adjustments to personnel allocations that have already been approved, the Army could yield such an asset.

According to an article published by the Army News Service on 18 November, 2004, approximately 9000 new military intelligence positions will be created over the coming few years as a result of the transformation toward modularity.<sup>68</sup> Of those 9000 new positions, according to the Army’s Director of the Actionable Intelligence Focus Area, over one-half will be assigned to brigade-sized Units of Action (UA), and one third will be assigned at the division level, or Unit of Employment-X (UEX).<sup>69</sup> Clearly the Army has identified the need to provide tactical commanders with a greater ability to collect and analyze data that can provide the intelligence

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<sup>67</sup> LTG Wallace interview.

<sup>68</sup> Gary Sheftick, “Actionable Intelligence: Units of Action to Beef Up Military Intelligence Assets,” Army News Service, November 18, 2004, available online through the TRADOC News Service, 19 November, 2004, <http://www.tradoc.army.mil/pao/tnsarchives/november04/112704.htm>.

<sup>69</sup> Ibid.

required to support current and future operations. That same requirement exists within the cultural realm of data as well. Arguably, the cultural data coexists within the same intelligence realm. By merely recoding a fraction of the personnel allocation that will be created in the intelligence community over the next few years and training them to be cultural analysts, the Army could improve its ability to collect and analyze data on multiple levels. Since the intelligence community at Fort Huachuca is already the proponent for cultural awareness within the force, the Army is already headed in the right direction. What is required, however, is that these specialists be adequately trained and distributed throughout the Army at the appropriate organizational level. This improvement would greatly enhance the Army's ability to conduct offensive information operations. The required manpower exists, the recommendation is feasible, all that lacks is a decision, adequate training, and action.

## **Conclusion**

The Army, in its efforts over the course of the past thirty years to improve its core capabilities in employing the elements of combat power, has gone to great lengths to maximize its lethality. Leveraging the use of emerging technology, structuring the force, training its leaders and soldiers, and improving its weapon systems have all greatly enhanced the Army's ability to close with and destroy enemy forces. Such sweeping changes are now required to augment the ability to increase the efficiency of the newly christened element of combat power. By developing means by which to store and share information regarding regional cultural factors, as well as establishing a military occupational specialty to analyze and incorporate these cultural factors into the planning and execution of information operations, the Army will be able to realize the mandate of the 2001 QDR by transforming information operations from simply an enabler of current military forces to a core capability of future forces. Not only would this concept of a networked database of regional cultural environments, connected and managed by a cadre of cultural analysts, improve the tactical efficiency of units executing information operations, it

would help to achieve each of the specified requirements outlined in the IO Roadmap. As improvements in the planning and execution of information operations continue, and are documented and shared throughout the force, the Army will certainly bridge its own culture gap. As that gap narrows, information operations will more effectively meet the operational needs of the Army. As such, the force will be more capable to utilize non-lethal means to influence and overcome enemy forces and adversarial populations.

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