

IO FOR JOE

Applying Strategic IO at the Tactical Level

By Lieutenant Colonel Joseph F. Paschall, USMC

LCpl Williams J. Smith, a fire direction control Marine, hands out information operation pamphlets to children during a civil affairs mission to Abu Tiban, Iraq.

(USMC Photo by GySgt Kevin W. Williams, 31st Marine Expeditionary Unit)

Information operations (IO) is a much maligned term that is applied to everything and nothing at the same time. At the strategic level, the joint services continue to wrestle with exact definitions and core capabilities of IO and, too often, recommend changes.

Concurrently and in the absence of clear guidance from “echelons above reality,” troops in Iraq and Afghanistan apply their own understanding of IO at the tactical level. The challenge is to glean from the strategic level aspects of IO that can be readily applied at the tactical level and train and equip Soldiers and Marines to use these concepts daily to guide their actions.

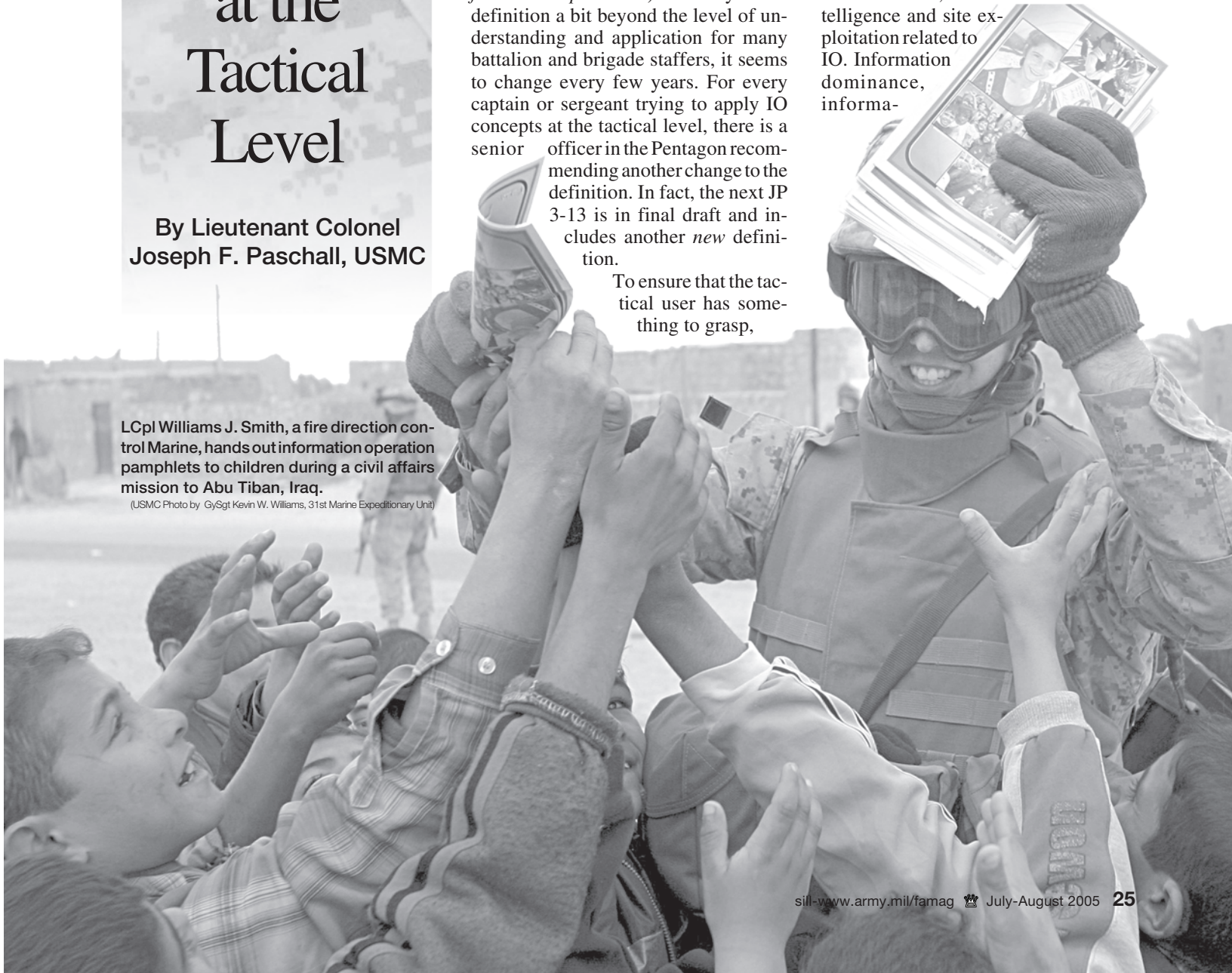
IO Defined—Joint Confusion. “IO involves actions taken to affect adversary information and information systems while defending one’s own information and information systems” (*Joint Publication 3-13 Joint Doctrine for Information Operations*). Not only is this definition a bit beyond the level of understanding and application for many battalion and brigade staffers, it seems to change every few years. For every captain or sergeant trying to apply IO concepts at the tactical level, there is a senior officer in the Pentagon recommending another change to the definition. In fact, the next JP 3-13 is in final draft and includes another *new* definition.

To ensure that the tactical user has something to grasp,

paraphrasing the definition as “influencing the way someone thinks” stays within the spirit of the definition no matter how much it changes. It also enables Soldiers and Marines to move forward at the tactical level without having to take a step back each time the definition changes.

Aside from the changing definitions of IO, the delineation of what elements comprise IO sows more confusion at the tactical level. (See the figure on Page 26.) Doctrinal IO core elements (as of April 2005) are psychological operations (PSYOP), military deception (MILDEC), operational security (OPSEC), electronic warfare (EW) and computer network operations (CNO) with the related activities of civil affairs (CA) and public affairs (PA), all intertwined by the need for accurate and timely intelligence support.

Joint publications also consider physical destruction, counterintelligence and site exploitation related to IO. Information dominance, informa-



tion fires, information assurance and any other term that can be prefaced with “information” add to the confusion by providing new ways of describing the problem instead of offering tangible solutions.

Meanwhile, the Air Force also has created its own terminology, which includes delineation of elements into groups of network operations and influence operations.

This grouping and regrouping of such disparate and seemingly unrelated items might lead one to believe that *everything* is IO—the corollary of which becomes *nothing* is IO. To assist the tactical planner currently engaged in actually influencing people (vice doctrine), we must get past this tendency to endlessly group, regroup, redefine and rename everything relating to IO and emerge with something that describes the exact application of IO elements for tactical units.

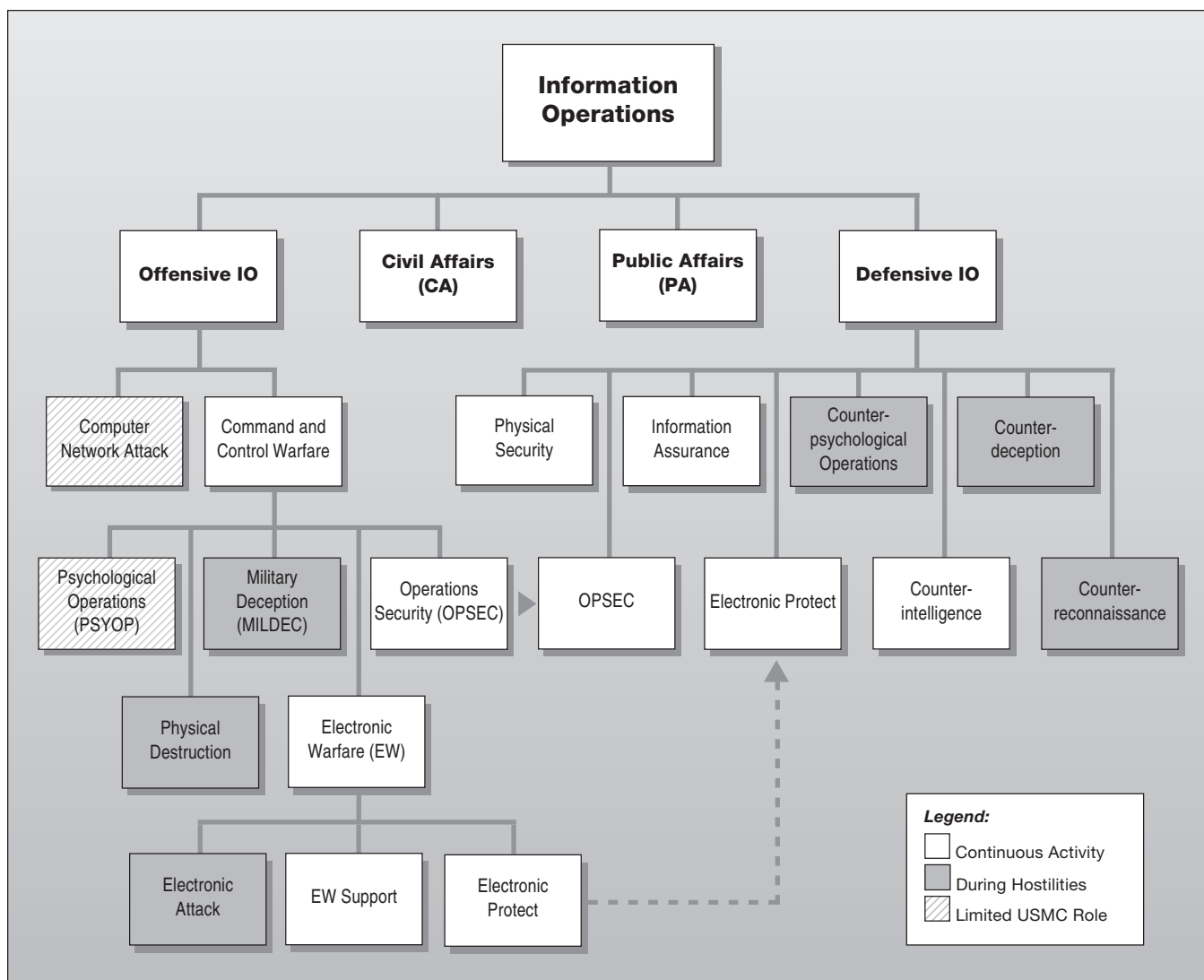
Tactical IO—Joint Disparities. Because these elements of IO have different levels of importance for different services, first we should depart from the *joint IO* vision to define IO at the user level on the ground. Considering that the Navy and Air Force usually conduct operations from 12 nautical miles off the coast or 30,000 feet above ground, they have cultivated significant strengths in the techno-centric functions of EW and CNO, yet have a near inability to influence anyone face-to-face. For this reason, they historically have taken IO to mean synchronization of their EW and CNO assets. The result is when Navy and Air Force IO planners join a joint task force (JTF) IO cell, they often forget that there are more human-centric ways to conduct IO.

Similarly, the best applications for IO within tactical units of the Army and Marine Corps are those involving face-to-face contact with the local populace.

Army IO planners likely are from intelligence or PSYOP backgrounds, and the Army is heavy in PSYOP and CA forces. Therefore, Army planners probably fall back on face-to-face methods of influencing a population.

Although the Marine Corps has so few IO planners that they are not often found in a JTF, a Marine will have some understanding of the Navy techno-centric mentality because of the need to operate and launch from sea-based platforms. But he will tend to depend on the synchronization of PSYOP, CA and PA to define his concept of IO.

Tactical IO Applications. Although the primary elements of IO applied on the ground may be PSYOP, CA and PA, all elements of IO have some application in ground engagements. CNO and EW are commonly used to isolate an objective area for brief periods of time to better facilitate ground maneuver and, therefore, warrant at least cursory fa-



Information Operations (IO) at the Tactical Level

miliarization by the staff.

Although CNO and EW commonly go unnoticed by company and even battalion commanders, these types of non-kinetic effects are coordinated by a higher headquarters staff in support of ground operations. The tactical commander may not need to know *how* to use a plan for CNO and EW effects, but he must know that they are available to him and can help isolate his objective for the short term.

A more commonly visible application of EW at the tactical level (outside of signals collection related to intelligence) is EW for force protection. In both Afghanistan and Iraq, remotely controlled improvised explosive devices (RCIEDs) have become one of the primary threats to Coalition Forces. Counter-RCIED black boxes emplaced in coalition vehicles can be used to pre-detonate RCIEDs and protect the force. Although this clearly is not an IO-related application of EW, IO planners need to be familiar with this application.

OPSEC is applied across the spectrum of conflict and across the spectrum of war. However, at the lowest tactical levels, its applications are narrow. At this level, the most pressing concerns for OPSEC are day-to-day protection of information regarding critical vulnerabilities of the force. Therefore, all units must ensure that Soldiers adhere to communications plans, patrols vary their routes and troops take other physical measures to avoid offering the adversary an easy target.

In addition to these age-old methods of obscuring friendly activities from an adversary, we now have to worry about tipping our hand through emails to friends and relatives back home. Because every Soldier and Marine may have a digital camera and everyone wants to send pictures and notes back daily, we must ensure that troops know exactly what they can and cannot talk about and (or) restrict internet access for certain periods of time when missions are ongoing.

PSYOP is another IO-related term that is misunderstood. In fact, many Navy officers hold that a carrier battle group is conducting PSYOP when it nears a foreign shore in a show-of-force.

Without delving into a parochial dis-



A Marine officer from the 4th Civil Affairs Group shows press members around the Jolan Park Humanitarian Assistance Site in Fallujah.

USMC Photo by GySgt Robert Blankenship, IMEF G-3 Combat Camera

cussion of what constitutes PSYOP and what is simply a psychological activity, the tactical user should consider PSYOP simply as marketing. At this level, we do not intend to engage in any PSYOP other than portraying the truth (our version) to local residents. PSYOP as marketing is portraying us to our adversaries in the most positive light.

Strategic and operational PSYOP actions have impact at the tactical level, so it behooves everyone to be familiar with PSYOP capabilities to conduct broadcasts and drop leaflets as well as pass information via hand-held radios. Tactical units may find some of these leaflets and radios in their areas of operations (AOs).

Tactical units generally only will work directly with the PSYOP activities of handbill and poster distribution and face-to-face loudspeaker broadcasts. At the battalion or brigade levels, the commander will probably consider these capabilities his IO.

Although leaflets are created primarily for aerial delivery, they also can be hand-delivered. Therefore, some battalions/brigades may be tasked to hand out leaflets during routine patrols or other operations. Handing out leaflets adds a human dimension that enables our forces to gain feedback on the locals' reactions to the leaflets—one of the biggest challenges. Troops should be pre-briefed to be prepared to judge whether the handbills were received positively or negatively.

Many tactical commanders confuse CA with civil-military operations (CMO). In CA, a school-trained, military occupational specialty (MOS)-holding CA professional conducts long-term assessments, determines civil goals

and then coordinates the accomplishment of those goals.

However, in the absence of a CA detachment, there is much that a tactical commander can do for himself by way of CMO. Anyone who can liaison with locals to determine a need and unite that need with a capability of the unit to meet the need can perform CMO.

In Iraq during the early combat stage of Operation Iraqi Freedom (OIF) I, my unit could barely purify enough water to satisfy its own needs and certainly had no extra chow to offer. However, we found other ways to meet some

basic needs without compromising our own needs.

A local village with no playground for the kids and a damaged schoolhouse became the perfect site for a platoon-level CMO project. We brought in our bulldozers to level a playing field, used PVC pipe and camouflage netting to make goals and bought a soccer ball in town for five dollars. Total cost was five dollars and six hours of sweat-equity for 30 Marines.

Through our embedded media, we had pictures of Iraqis playing soccer with Marines on CNN by that evening. At the same time, another platoon of Marines was cleaning up the village schoolhouse.

These are perfect examples of "IO on the cheap" whereby a tactical unit can make a difference and build rapport with the locals while also realizing some strategic impact if media can be involved. It doesn't take much more than a platoon commander with a little creativity to undertake this type of CMO project.

Other examples of IO on the cheap are the CMO projects that can be undertaken through the use of unit medical/dental civic action programs (MEDCAP/DENCAP) and veterinarian civic action programs (VETCAP). Units may find that in some areas, the locals don't know who is running in the upcoming election but clearly know their livelihood is tied to whether or not their livestock is healthy. In rural areas, units can make significant progress with locals when they help them get back on their feet economically.

These relationships may later develop into good intelligence collection opportunities. Obviously, not every unit has an organic medical/dental/veterinary capability beyond a medic. However, if

the platoon commander is thinking along these lines and finds a significant need in his AO, he can request MEDCAP, DENCAP or VETCAP support from his higher headquarters. Doctors, dentists and veterinarians want to get outside the wire too, so sometimes this can be mutually beneficial for all parties involved.

PA is invaluable to the IO effort at both the tactical and strategic levels. In fact, PA is often responsible for merging the two levels by giving strategic impact to tactical actions and tactical impact to strategic issues.

PA also brings the first major friction point, which is the relationship between PA and PSYOP. Doctrinally, PA *informs* the US public concerning military activities while PSYOP *targets* foreign sources for our message.

These lines are blurred at the tactical level where PA embedded media are often from foreign outlets, and PA media events involve foreign press. However, at the tactical level, the difference in the two should not be so extreme because both PA and PSYOP are *marketing* the US military to the media.

One of the innate challenges of IO planners at any level is to convince PA and PSYOP personnel to work together and to force them do so when friction occurs. However, both PA and PSYOP planners should be able to agree that, at the battalion and brigade levels, both are marketing the same product—the truth. Both entities stand to gain by sharing the media through which they have access (TV/radio, handbills, leaflets and loudspeakers).

One vignette that encapsulates how IO can be effective at the tactical level is related to my last unit deployment in OIF I. In April 2003, the unit recently had moved from An Nasiriyah to the Qalat Sukar area of central Iraq and had not yet established total control of the area. Before any of our intelligence or reconnaissance personnel went into Qalat Sukar, we sent in a tactical PSYOP team (TPT) to desensitize the village to our presence.

The TPT incorporated an interpreter from CA who had lived in the area 10 years before but had immigrated to the US. The team also incorporated intelligence personnel to take digital images of potential targets for follow-on missions.

With the help of the interpreter, the team identified a Ba'ath Special Police headquarters and a Ba'ath Party head-

quarters and pictures were taken for mission planning. Because both targets were in populated areas where collateral damage could be severe, the commander opted to have a small company raid force led to the objective by the TPT. No enemy fire was taken at the objective, and a couple of rooms full of small arms and ordnance were confiscated.

While the ordnance was being seized, a riot appeared to be brewing in the street where the locals had been cordoned off by security forces. The “riot” was actually a throng of well wishers who recognized the interpreter and reunited him with his family. (Chanting and screaming Arabs often look the same to most Americans whether they are happy or angry.)

The media's interest immediately shifted from coverage of the ordnance seizure to the human interest of the combat family reunion. The day ended with the unit being welcomed by throngs of enthusiasts who cried and thanked us for bringing their local hero home with the victorious Coalition. Because all of this was captured by the media, it received coverage on several stations worldwide that evening.

Although the military impact was simply the seizure of a large arms cache, the political impact was much more significant on many levels. Locally, we had gained major inroads with the town by way of the interpreter's reunion; strategically the then-weak international Coalition was shown a “happy face” for its intervention in Iraq.

You could say that we had craftily scripted all of this, but that's not how it usually works. What separates a good IO planner from a bad one is the ability to recognize when something falls into his lap and capitalize on it.

There are many opportunities at the tactical level to capitalize on good works. IO can be the facilitator by ensuring that MEDCAPs or DENCAPs occur in the village where the unit wants impact by making sure the commander knows when to expect media presence and what “hot button” topics should be either pushed or avoided. IO also can help the commander make the most of his kinetic effects on the battlefield by offering information on which targets will have the desired political/economic impact when attacked and which targets to avoid attacking.

The IO Planner. As the IO planner seeks to synchronize these disparate

activities, there are certain friction points that will make his work more difficult than necessary. Personnel from the PSYOP, EW, PA and CA fields have trained for their professions for years and often resent the imposition of an IO planner who has been trained in a two-week “shake-‘n-bake” course—the implication is that these planners are professionals, whereas, the IO planner is an amateur.

Specifically, PA is hesitant to engage with PSYOP, PSYOP doesn't like working with CA and CA doesn't like working with counterintelligence (CI). All these present leadership challenges, but there are significant gains for the unit if they can coordinate and synchronize their activities.

The IO planner is usually the senior planner at any level and is tasked with integrating these functions. Yet none of them technically work for him, and they may often choose to remind him of that. Personalities will come into play, but a savvy IO planner should be proficient at persuading people to work together without alienating them.

Once the IO planner has mastered the ability to glean useful applications from the academic rhetoric of joint IO publications, has become savvy enough to persuade all elements to play nicely together, and has honed his creativity skills enough to consistently capitalize on any opportunity that comes his way, he still is not out of the range of “Murphy.” Despite the IO planner's best efforts to control events at all levels, whether or not the IO plan is effective ultimately is determined by the least educated, least culturally aware and lowest-paid player on the field: GI Joe.

The IO Impact of Joe. Joe is and always has been the best weapon and worst liability of the IO effort. He has the face-to-face access on a daily basis that more senior personnel do not have, and it is his actions, not the IO planner's, that determine the local attitude toward Coalition Forces.

CNN loves to watch Joe because he shoots from the hip and speaks from the heart. Joe will make or break the mission, and his mistakes can fuel the insurgency. Because all Joe's actions can now be broadcast in real-time via international media, his every action or inaction has immediate strategic impact.

Joe can be a liability, but he also can be our greatest asset if he is given a little more support and a lot more information. Joe doesn't have much worldly

experience, but he *is* a quick study. He is more adaptable than his superiors and more flexible in his approach to dealing with others.

To train Joe and give him some guidance at the lowest possible level, battalion/brigade S3s can coordinate language and cultural training for him before deployment, and PA can ensure that Joe has a rules of engagement (ROE) card in his hip pocket in case he runs into something he is unprepared for. The S2 or PA can give him a daily dose of the hot button issues from international media reporting, so he knows what locals might hit him with when he is out in town. (Will they throw rocks today because Abu Ghraib just broke the news? Is there a cleric on trial somewhere?)

Joe also should have some help at battalion/brigade in the form of PSYOP, PA, CA and Combat Camera assets that he can seek out for guidance. Situation allowing, ideally each battalion S3 shop would have an IO-trained officer to help guide Joe and capitalize on daily opportunities falling into the battalion's lap.

Joe is the dissemination point for US policy, and he can handle more than we give him credit for.

IO can be very complicated and confusing if we allow it. Part of the biggest obstacle in the implementation of IO is that for every young battalion IO officer trying to come up with an IO plan in Iraq, there are 10 senior officers talking about IO in the Pentagon. It is much easier to continue the circular academic debate about IO, strategic communications, public diplomacy, etc., than to actually consider how an infantry battalion can employ IO concepts.

We have to get past the endless debate of terminology and "death by Power-Point" that IO has become and get down to giving Joe something he can use. We have opportunities in Iraq and Afghanistan everyday that we can capitalize on if we can instill a basic understanding of the tactical applicability of IO in our battalion/brigade staffs. It needn't be complicated or technical to succeed. We simply need a few good IO planners who can train Joe, think outside the box

and recognize opportunities when they arise.

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1st Cav Div Arty Inactivates

On 30 June, the 1st Cavalry Division Artillery (Div Arty) inactivated in ceremonies at Cooper Field on Fort Hood, Texas. The Div Arty has been part of the first Cavalry Division for the past 65 years. The inactivation is part of the division's becoming modular.

The division recently returned from Operation Iraqi Freedom II, serving as Task Force Baghdad. While in Iraq, the Div Arty Headquarters served as the division's 5th Brigade Combat Team (BCT) and several FA battalions served as motorized task forces.

During his inactivation speech, the Commanding General of the 1st Cavalry Division, Major General Pete Chiarelli, praised the performance of the Div Arty in Iraq. "If you were to read each of [the Div Arty] Soldier's records, you would not see infantryman written on them....But on the streets of Baghdad, you couldn't tell the difference. These were professional Soldiers with missions to accomplish, and they performed absolutely magnificently."

Also during the 30 June ceremony, the 1st Battalion, 7th Cavalry (1-7 Cav) and 1-21 FA had changes of commands. Both battalions were part of the 5th BCT, among other units.



The last commander and command sergeant major of the 1st Cavalry Division Artillery (*First Team, Red Team*), Colonel Stephen R. Lanza (on left) and CSM Gerald J. Schindler (right), case the Div Arty's colors during the 30 June inactivation ceremony at Fort Hood, Texas.

Photo by Fred W. Baker III