



SOF and the Future of Global Competition

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Abstract

The 2018 National Defense Strategy (NDS) makes clear that competing effectively with state adversaries will be the primary focus of the Department of Defense (DOD) going forward. Irregular warfare (IW) is a key element of modern great power competition (GPC), and our adversaries are deftly exploiting unconventional methodologies—particularly the use of information and intermediaries (i.e., proxies and surrogates)—as mediums of national influence. In March 2019, CNA hosted a cohort of academic, government, and military experts for a discussion on how special operations forces (SOF) can best lead or support US Government (USG) efforts to compete successfully on a global scale using information operations and intermediary partnerships. The discussion is summarized and synthesized in this document.

Distribution

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Approved by:

May 2019



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Executive Summary

The 2018 National Defense Strategy (NDS) makes clear that competing effectively with state adversaries will be the primary focus of the Department of Defense (DOD) going forward. Irregular warfare (IW) is a key element of modern great power competition (GPC), and our adversaries are deftly exploiting unconventional methodologies—particularly the use of information and intermediaries (i.e., proxies and surrogates)—as mediums of national influence. In March 2019, CNA hosted a cohort of academic, government, and military experts for a discussion on how special operations forces (SOF) can best lead or support US Government (USG) efforts to compete successfully on a global scale using information operations and intermediary partnerships. Key themes from this discussion included the following:

The US must embrace irregular warfare as inherent to modern great power competition

- Today's state-on-state competition emphasizes a way of war that mitigates the risk of escalation and maximizes the potential for achieving strategic goals. Technological advances in media production and dissemination along with abundant opportunities for sponsorship in third-party conflicts have primed the environment for great power interjections via irregular approaches. Although its near-peer adversaries have embraced IW, US investments in modern unconventional capabilities have been lethargic and disjointed. To compete successfully on the global stage, the US must commit to an IW strategy with both institutional and operational components, and invest in the capabilities needed to implement it.

SOF's strategic role in today's irregular battlespace must be defined and implemented

- SOF represent the only US military entity to consistently train for and conduct unconventional warfare operations, and they maintain a significant portion of DOD's IW capabilities. As such, the US Special Operations Command (SOCOM) has the ability to advance US interests in the global competition for influence. If DOD is to engage effectively in today's evolving battlespace, it would benefit from investing in this deep IW expertise and emphasizing irregular forces and methods along with conventional services and mediums.

SOF need a collaborative civilian partner for conducting information operations

- A cohesive whole-of-government approach is essential to effective global competition and the success of a sustained IW strategy. Developing a civilian counterpart to SOF's

information warfare mission—an entity in the tradition of the US Information Agency—would facilitate mutual support and partnership between SOF practitioners and civilian policy-makers. This entity would also hone the messaging used in US information operations, ensuring that they are eloquent, diplomatic, effective, and consistently aligned with both US strategy and democratic values.

Practitioners need to study and understand the tactical and strategic toolkits for irregular operations

- The modern irregular battlespace combines classic techniques (e.g., third-party force sponsorship and information censorship) with new modes of influence (e.g., offensive social media attacks). Thus, it is essential that practitioners define and implement the most effective methods for promoting the American narrative around the world—and ensure that it has greater integrity and resonance than its competitors' messages.

The US must define the future of IW and the American narrative as key elements of its competition for global influence

- Great powers are approaching a battlespace confined by mutual nuclear and conventional deterrence. This dynamic places greater strategic importance on unconventional actions and challenges the effects of US military supremacy. To compete in this environment, the US needs to establish a new American way of irregular war, invest in the entities to enact it, and hone the messaging to guide its operations.

Participants generally agreed that the United States' nation-state adversaries are pursuing global influence via irregular campaigns, rather than by conventional ones. Adversaries avoid engaging the US in areas and through mediums where it still holds unparalleled dominance, choosing instead to exploit our chronic inattention to IW. Near-peer competitors are conducting sophisticated influence operations that span the kinetic and non-kinetic domains, from sponsoring proxy conflicts to waging disinformation and propaganda campaigns. The common understanding of irregular forces is evolving by extension—cyber warriors, criminal traffickers, and propagandists are operating alongside the stereotypical guerrillas and covert actors. In a climate where tanks and battleships are more deterrent than dynamic, multi-skilled irregular warfighters ensure that IW will stand as the most practical and prevalent method of war. The US must reintegrate unconventional methodologies into its defense strategy to remain competitive in this evolving environment.

The resurgence of irregular war presents an opportunity for practitioners and strategists to consider the future direction of SOF. SOF's operational excellence in the unconventional battlespace is its defining characteristic as a military entity, and it remains the only DOD component to consistently train for and conduct influence operations. This comprehensive capability set includes psychological operations, civil affairs engagements, special and

information warfare activities, and proxy/partner force development. Today, SOF are uniquely capable and postured to engage in the competition for global influence.

Participants assessed that in the future, it will be essential to invest in unconventional specialists, develop decisive IW strategies, and install a dedicated civilian information agency to guide and collaborate with the SOF enterprise. Achieving these goals will enable SOF to successfully support DOD's efforts to meet the challenges outlined in the NDS, and will equip the force to simultaneously protect and project the American message in the global competition for influence.

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Introduction

The 2018 National Defense Strategy (NDS) makes clear that competing effectively with state adversaries will be the primary focus of the Department of Defense (DOD) going forward. A key element of modern great power competition (GPC) is irregular warfare (IW), and our adversaries are deftly exploiting unconventional methodologies—particularly the use of information and intermediaries (i.e., proxies and surrogates)—as mediums of national influence. In March 2019, CNA hosted a cohort of academic, government, and military experts for a discussion on how special operations forces (SOF) can best lead or support US Government (USG) efforts to compete successfully on a global scale using information operations and intermediary partnerships.

Our discussion addressed the following questions:

- How can past USG experiences of competing in the information space and engaging with proxy actors inform our approaches to GPC today? What lessons should we draw from unconventional activities used during the Cold War?
- How should the US conceptualize the use of information and intermediaries given modern advancements in communication technology and social media? What do trends in digital connectivity, along with technologies such as machine learning and artificial intelligence, portend for the future of information and influence activities?
- How does the lack of a US lead agency for information operations affect the role of SOF in the information battlespace? Which aspects of global information activities should SOF seek, lead, and support? Are there aspects that SOF should avoid? If so, what are they and why?
- How should the USG envision the role of state and non-state proxy actors in the context of current and future global competition? Should this be a significant feature of future USG strategy and policy? Why or why not?

To encourage a frank exchange of ideas, the conversations summarized in the following sections were held under the Chatham House rule of non-attribution. No source citations are included in this document, and no speakers are identified. In the instances where we include quotes from the event, the function is solely to capture compelling phrasing; these quotes should be considered closely paraphrased and should not be interpreted as official statements. The event consisted of three main sessions—a keynote and two panels, each with a subsequent question-and-answer segment—the key themes of which are synthesized and summarized here. All presentations and discussions were unclassified.

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Summary of Discussion

The Emergent Importance of Irregular Warfare in Modern Great Power Competition

The United States' near-peer adversaries and strategic competitors—China, Russia, Iran, and North Korea—are bringing IW to the forefront of their global influence campaigns. Instead of confronting the US conventionally, hostile actors now embrace a way of war that mitigates the risk of escalation and maximizes the potential for achieving their strategic goals without resorting to large-scale armed conflict. These adversaries are revitalizing classic IW methods by leveraging emergent technologies and exploiting today's hyper-nationalist brand of political instability. Manipulating their competitors' information environments and sponsoring third-party actors in key areas allow them to amass power subtly and effectively. Ambitious nations continue to develop regular military capabilities, but aim to achieve their strategic goals without kinetically engaging their conventional forces.

Event participants identified and explored two key aspects of today's IW—information operations and proxy sponsorship. Throughout the discussion, the speakers expressed unanimous concern that the US is failing to place sufficient strategic emphasis on unconventional methods of GPC. Outlining the rationale for this assessment guided the first major outtake from the discussion.

Defining Influence Operations: Information Warfare

The USG's inattention to information warfare is a major obstacle to competing more effectively with its state adversaries. To paraphrase a point made by one of the speakers, the language of war has shifted from a battleship to a soundbite. Today's high-stakes battles are being fought in the information environment—alternatively referred to as “the infospace” throughout the discussion. Social media campaigns (featuring widespread use of disinformation, “deep fake” images, false personas, and botnets), releases of hacked sensitive information, media censorship, and state-sponsored propaganda are replacing artillery, ships, and aircraft as the primary vectors of the daily competition for global influence. Information proliferates over a constantly expanding array of platforms and crosses the globe in a matter of seconds. Interjections from individuals (e.g., celebrities, influencers, thought leaders) and non-state actors compound the chaos of this crowded global conversation. The infospace is a virtually unregulated international meeting place where traditional linguistic and geospatial barriers deteriorate and the collective consciousness is vulnerable to influence and exploitation.

Conventionally oriented governments are only beginning to grasp how an undefended infospace can jeopardize their military operations, diplomatic initiatives, and international stature. Current US strategy has woefully under-prioritized the virtual battlefield our adversaries have embraced. To illustrate, one participant recalled a viral video that triggered violent protests outside US embassies around the world. Another mentioned an overseas military exercise that needed to be cancelled after adversarial actors successfully infiltrated the local infospace with anti-American propaganda. In both cases, information warfare attacks endangered US personnel and political-military initiatives, but there was no mechanism to effectively cauterize and counteract the damage. Continued failure to comprehend the infospace's critical role will be detrimental to US foreign policy goals and initiatives.

If the US is to compete effectively with our near-peer adversaries, we must realign our approach to the information environment. Our government currently deals with the infospace in a reactive and disjointed manner—there is no standardized political-military doctrine or interagency methodology guiding our responses to information warfare attacks. In many ways, DOD should approach the infospace as it does physical space—by mapping, analyzing, and maneuvering in the information environment with the same principles currently applied to geospatial terrain and human networks. Instead of treating the infospace as an add-on to kinetic operations, we need to accept it as the primary operational domain for day-to-day competitive activities.

Defining Influence Operations: Proxy Sponsorship & Conflict

Today's GPC also plays out kinetically in the form of proxy conflict. Partner force sponsorship is another form of influence that minimizes the potential for conventional escalation while promoting the sponsor's strategic goals. There is also an assumption that utilizing proxy forces is "war on the cheap," which theoretically allows the sponsoring state to exert influence in fringe areas without major financial investment.

For all its ostensible benefits—and despite its age-old nature—proxy warfare is unwieldy and frequently messy. Misaligned goals, poor communication, and great power tensions can have deleterious effects on proxy operations, hurting both sponsor and proxy. Proxy warfare can also involve a broad spectrum of potential forces. In recent history, proxy conflicts have incorporated state-on-state, regional, civil, and cyber wars. The variety of individual actors is similarly broad: In the current battlespace, private military contractors (PMCs), gangs (e.g., bikers and soccer hooligans), and uniformed but unidentified forces appear alongside stereotypical indigenous guerrilla forces.

This convoluted disparity notwithstanding, proxy and partner force sponsorship remains a useful tool for global competition. One speaker even assessed that "moving forward, this is where warfare will exist predominantly." Congress has already shown an appetite for DOD to employ proxy approaches. For example, Section 1202 of the 2018 National Defense

Authorization Act states that, “The Secretary of Defense may, with the concurrence of the relevant Chief of Mission, expend up to \$10,000,000 during each of fiscal years 2018 through 2020 to provide support to foreign forces, irregular forces, groups, or individuals engaged in supporting or facilitating ongoing and authorized irregular warfare operations by United States SOF.”

The development and employment of proxies—particularly to conduct unconventional warfare (UW) activities—has been a core SOF competency since their inception. As such, initiatives such as the Section 1202 authority offer compelling opportunities for integrating special operations and UW into mainstream DOD thinking. However, to make the most of those opportunities, the US needs to reevaluate its approach to sponsoring proxy forces. Many panelists expressed deep concern that our current strategy is “organized to fail,” ultimately harming ourselves along with our third-party partners. The current example of the Syrian Democratic Forces offers a cautionary tale. “No service is really organized to handle proxy war or proxies,” one subject matter expert (SME) commented, citing chronic failures to consider ethnography, legitimacy, and long-term effects of proxy sponsorship on regional security and stability. These issues were cited as plaguing the US military’s uneven history with proxy forces in the past, and they must be resolved if the US hopes to use proxies and surrogates to achieve future strategic outcomes.

Several commentators stated that, if the US is to reengage in GPC via third-party sponsorship, it needs to develop a considered strategy for SOF to follow. Developing a methodology grounded on a thorough survey of regional ethnography, proxy force legitimacy, and long-term effects of US involvement will go a long way toward rehabilitating proxy warfare for today’s great power competition.

Defining SOF’s Role in Today’s Irregular Battlespace

As we transition into an increasingly irregular battlespace, DOD needs to improve its approach to dealing with irregular warfare’s unique set of challenges. IW is particularly difficult to navigate given its close link to the human element of operations. When realigning roles and missions in this evolving environment, it is in DOD’s best interest to tap into SOF’s deep expertise and capability in the unconventional sector.

“[SOF have] had the emergence of the human domain of warfare, and in that domain, information operations are critical,” one speaker emphasized. “SOCOM could create a world-class irregular warfare doctrine and hub...While we run headlong into great power competition, we must focus on [developing] a great irregular warfare capability as well.”

Over the course of the conversation, participants determined five steps necessary to make this goal a reality:

1. **Create an influence strategy.** The US needs to define how it will approach conducting and countering influence campaigns. The irregular warfare appendix to the National Defense Strategy is nascent, and serves primarily as an institutional strategy rather than an operational one. To be effective on a practical level, the US needs an influence strategy that includes actionable methods and goals.
2. **Bring SOF to the forefront for IW.** As the only military entity with a core IW mission, SOF have the capability to raise the United States' stature in the global unconventional battlespace. Reallocating priorities and assets to emphasize this mission—both across DOD and within the SOCOM enterprise—will be necessary for enhancing SOF's capacity and preparing the force to engage in a broad spectrum of IW activities against near-peer competitors.
3. **Invest in SOF's influence operations capabilities.** As one panelist stated, "Unconventional warfare is absolutely part of SOF's DNA...great power competition is not relegated to aircraft carriers and tanks. Proxies, PMCs [private military contractors], and irregular actions are equally relevant—if not more so. SOF can be grossly misused as high speed light infantry, and you don't want these guys to be subsumed and misused." Participants also expressed concern that, during the last 20 years of countering terrorism organizations, SOF's hallmark UW capabilities have atrophied in the context of engaging a state adversary. There is potential to apply irregular warfare to great power competition, but SOCOM needs to re-examine its investment priorities across the SOF enterprise if it is to leverage these opportunities.
4. **Embrace influence operations.** Destigmatizing the concept of "influence operations" will be essential as we move toward an operationalized IW strategy. SOF have the most comprehensive information warfare capacity in the US military, but a culture reluctant to embrace "underhanded" tactics has stymied its full development. To compete effectively in today's environment, the SOF enterprise needs to move past the antiquated assumption that waging information warfare is somehow morally inferior to engaging in a firefight. As one participant explained, all military actions are designed to exert a form of influence—whether the medium is a bullet or a tweet is immaterial if it accomplishes the strategic goals at hand.
5. **Establish training centers and space for intellectual leaders.** Participants agreed that DOD needs to invest in a space for consistent academic dialogue and research on the evolution of modern political warfare. One speaker expressed the entity's function as "answering the question: What kind of organizations and strategies do we need to solve the emergent problems?" while serving as a place "for conversations and

trainings...an intellectual center for routine, safe conversations [with] a budget for momentum to sustain dialogues”. Participants indicated a variety of existing institutions—such as the National Defense University, the service academies, and Fort Bragg’s John F. Kennedy Special Warfare Center and School (JFKSWCS or SWCS)—as viable foundations on which DOD could build a political warfare center of excellence.

Providing SOF with a Civilian Entity to Collaborate on Information Operations

Throughout the event, participants emphasized the importance of developing a civilian counterpart to SOF’s information warfare mission. The SOF enterprise has traditionally had civilian partnership in its proxy ventures (one panelist cited the 20th-century collaboration between Central Intelligence Agency officers and Army Special Forces operators in Laos), but that kind of systemic support and partnership is currently lacking in the information environment. A failure to generate operational diversity represents a problematic breach in US resilience. Studying, maneuvering, and operating in the infospace should be undertaken by a team with a 360 degree outlook that spans both the political and military sectors. Although some participants suggested expanding the Global Engagement Center (GEC) to perform this mission, others assessed that the US needs a new civilian information operations agency.

Historically, this role was filled by the United States Information Agency (USIA) and guided by White House entities such as the Active Measures Working Group (AMWG). Participants cited both organizations as ideal for re-incarnation because of their well-organized structures and successful operational track records. These groups helped ensure that coherent messaging campaigns, designed to deliver short, interim, and long-term results, were skillfully implemented and managed throughout their lifecycles. Their operations were cited as tactful and eloquent, and equally palatable to domestic and international audiences. Today, the US would benefit from a new organization that could follow in these footsteps while addressing the unique challenges of the modern infospace and expanding the policy aspect of tactical messaging.

Much as USIA did, a modern civilian information agency would act as the strategic hub for infospace influence campaigns. Panelists agreed that a niche civilian agency staffed by a team of committed SMEs was necessary for success. According to one speaker, “[We] need to have somebody who has studied and worked with this [issue] in a coherent and continuous way. Judgment comes from intellect, experience and character. We need someone who has this kind of sustained background who will be able to translate and impart this into the broader organizations. Specialization is necessary to inform non-specialists.” The success of a global US messaging campaign relies on intragovernmental cooperation and a coherent grand strategy, but facilitating these elements is not a part of SOF’s organizational mission. A civilian entity

would be able to fill this role and provide the necessary expertise, vision, and centralized direction for a cohesive US messaging campaign. It would structure a cohesive mission for SOF organizations—such as the new Joint MISO WebOps Center at SOCOM—to engage with and support.

The new organization would also continue its predecessors' legacy of projecting diplomacy while promoting American democratic values and supporting the defense of the nation. During the discussion, a participant articulated this complex role particularly well:

“We need to acknowledge that having influence is not a bad thing, but [we should] also know what the idea is and why it should have influence...[we need something akin to] a new USIA, incorporating DOD; independent but mission related; the voice of America, creating peace while protecting our homeland; knowing when to act, to mitigate, and to resolve post conflict; know our audience, and know how to work with 3rd parties like NGOs [non-governmental organizations] and journalists; speak out against government officials who relate too much about police, sources and methods, or give misinformation; work on machine learning and AI [artificial intelligence], while never forgetting human judgment; build trust from the ashes of perception about government, higher education, Wall Street, the media...Information and technology are neither good nor bad, and come with no inherent value system. They come to be disseminated and deployed by smart people, with values in check and eyes open.”

Perhaps most importantly, an agency focused on information dissemination would be responsible for helping US citizens frame their collective experience into something we can authentically promote to the broader global community. Our adversaries are frequently authoritarian regimes that derive power from oppressing their citizens. These governments are rooted in the absolute suppression of the public, and their officials fear a free infospace. If citizens can investigate and question governmental abuses, the regime cannot maintain its power. The US infospace is frequently messy and factionalized, but the free exchange of ideas ultimately ensures a transparent and democratic system of government.

Our adversaries' failure to promote open conversation among their people is a significant operational weakness. “Our strength is our people,” one speaker pointed out, “[and] this is a huge advantage as long as we have a resilient society.” A new information agency would help safeguard that resilience by defending the US population against “adversaries [who] are trying to exploit division among us,” while also shaping and publicizing a unifying narrative. As a panelist noted, one of USIA's most successful initiatives followed the US moon landing in 1971. *Apollo XI* astronauts toured 22 countries alongside a NASA exhibit of moon rocks from the expedition—a simple gesture that projected America's scientific prowess abroad and celebrated the pioneer spirit at home. Although the available mediums have evolved since the mid-20th century, the core mission remains relevant to today's information environment. An entity that could promote unity and catalyze the best in America's domestic and foreign

conversations would do much to improve the US image in the infospace while bolstering its citizens' resilience to competitors' disruptive influence.

By establishing an agency that will take “strategic moves to defend democracy against interference” in the infospace, the USG would improve both SOF's information warfare efficacy and America's stature in the global competition for influence.

Understanding the Tactical and Strategic Toolkits for Irregular Warfare Practitioners

The policy expert participants identified the key ingredients for a functional political-military response to GPC employing IW—within that context, academic and industry panelists outlined the tactical implementation of modern IW techniques. During their discussion, these practitioners laid out a series of best practices for conducting influence operations. Spanning information dissemination and proxy/partner force sponsorship, these suggestions serve as a foundation for developing successful IW methodologies in today's competitive environment.

Best Practices for Influence: Information Dissemination

In the modern infospace, everyone is subject to influence—a major objective in today's GPC is to determine which nation will dominate that influencing. Heritage IW organizations (e.g., USIA and AMWG) were engendered by the Cold War's perception-centric climate, and, as such, they developed a range of tools for promoting the American way of life to the world. They published and distributed ideologically American books, sponsored English-language classes, and facilitated cultural exchange programs in regions open to US influence. These community activities dovetailed with embassy-level field programming designed to foster a functional relationship between US Foreign Service Officers and local officials and opinion leaders.

Today, social programming and hard copy materials remain important, but transmitted media outstrips them in both reachability and function. Internet social media platforms are “eroding our national boundaries on information,” accelerating the spread of ideas and ideologies while breaking down traditional linguistic and geospatial limitations. This situation opens us up to disinformation attacks (or “fake news”) and malign influence campaigns, but it also provides us with an opportunity to learn more about the populations living in both adversarial and potentially friendly regions. Federal agencies with information mandates have already pioneered creative strategies to deploy chatbots in key areas and synthesize physical geography with infospace mapping.

Despite the modern preoccupation with social media, several panelists noted that older transmission technologies—television and shortwave radio—remain more influential than the internet for reaching a broad audience. Many authoritarian regimes maintain a tight grip on their regional infospace, but radios are still relatively easy to access. Refugees and heavily

censored citizens rely on these simple mediums for information. Where feasible, special operators can also serve as the ultimate transmission method—human contacts able to deploy, protect, and work personally with populations vulnerable to disinformation attacks.

Panelists with expertise in information dissemination and infospace defense offered a variety of recommendations for both SOF and a future civilian counterpart, distilled below into a set of practical goals:

1. **Learn from heritage organizations.** Earlier influence operations professionals developed effective methods to disseminate American ideals on a global scale while defending them against adversarial incursions. Studying tactics, techniques, and procedures (TTPs) perfected by USIA and AMWG—many of which are still relevant in today’s infospace—is an essential first step in honing our influence strategy.
2. **Commit to the messaging.** In a political environment crowded with authoritarian regimes, US information organizations are often isolated advocates for truth, freedom of speech, and democratic ideals. Any disconnect between words and actions can devastate credibility and, by extension, efficacy. Our activities at home and abroad—as well as the language we use to report on those activities—need to embody our core message.
3. **Advocate interest from leadership.** Where it is impossible or insufficient to work directly with populations, partnering with local opinion leaders can draw positive attention to free US media outlets versus censored adversary news sources. In the domestic sphere, we can foster similar engagements with private-sector leadership and enjoin them to take in-house measures against disinformation attacks.
4. **Maintain respect for free speech.** In many parts of the world, the open press is the distinguishing characteristic of the US media. Promoting our ideals should not necessitate censorship or sacrificing freedom of expression.
5. **Protect and invest in reliable journalism.** In a domestic and international environment plagued by “fake news,” promoting ethical journalism and accurate news sources is a very effective measure against disinformation. For example, the Office of Internet Freedom (a component of the US Agency for Global Media, or USAGM) has supported this mission by investing in encryption and security protocols designed to preserve the integrity of responsible content sources—even in typically censored markets.
6. **Appreciate the capabilities of emerging tools, but deploy them with great care.** New tools (e.g., bots, troll factories, data mining) create tempting opportunities to dramatically shape and exploit the infospace. The long-term cost for doing so, however,

may vastly outweigh short-term benefits. “Credibility is crucial,” a SME affirmed, “[and] the second we deploy any of these tools, credibility tanks.”

Best Practices for Influence: Proxy & Partner Force Sponsorship

Much as a good infospace operation does, messaging heavily shapes the dynamic of a successful proxy/sponsor partnership. The relationship between sponsor and proxy is symbiotic, and lasting partnerships are frequently cemented by shared ethnic, religious, or ideological visions.

Our adversaries are working to develop these relationships in vulnerable regions around the world. The following nations have made particularly notable strides toward establishing functional proxy and partner force networks:

- **Russia** has increasingly supplemented its conventional forces with proxies, signaling a departure from its long preference for conventional battlefield operations. Russian PMCs abound in Syria and various parts of Africa, and influence operations in Ukraine take shape via proxies from the Donbass region. As Russian losses in today’s conventional conflicts rise, Moscow has turned its attention to nurturing more unconventional partners.
- **Iran** has invested in a robust network of politically and/or religiously aligned partners ranging from non-state actors to quasi-state entities. Tehran promotes regional sub-state proxies as a sort of ideological forward defense, encompassing Islamist groups such as Hezbollah, the Houthis, and Syrian government forces.
- **China** has embraced the use of regional proxies—usually in the form of off-shore fishermen, “private” oil rigs, or the ostensible inhabitants of artificial islands—in tandem with a growing cyber capability. China has long been at the vanguard of conventional and unconventional warfare strategy, from Sun Tzu’s *Art of War* to Mao’s *Red Book*, and Beijing is demonstrating its continued willingness to embrace emergent proxy warfighting techniques.

“Our adversaries have invested heavily in irregular warfare. The US, not so much,” a panelist summarized. “There is a recognition of its importance, but across the government there is a dearth of resources and attention. We have not fully embraced that this is a key area of competition.” This is not to suggest that the US abolish its code of international conduct; there are legitimate political, diplomatic, and legal elements that prevent DOD from engaging in many tactics that authoritarian militaries employ. Instead, we can address this issue by defining an American way of modern irregular warfare. An established set of TTPs to that end would help delineate acceptable avenues for engagement, enabling us to meet our adversaries in their chosen battlespace without compromising our democratic values.

This is not an impossible endeavor—third-party partnerships have been a significant element of US conflict in the past. During the Cold War, “US decision-makers and policy-makers gave a

lot of thought to irregular warfare.” Direct military engagement with the USSR risked escalation to a cataclysmic nuclear war. Competing via proxies in Latin America and Southeast Asia was a low-intensity and relatively inexpensive alternative to impede Soviet global influence. During this extended period of competition via third-party actors, the US learned a number of invaluable lessons that should be revisited as DOD thinks about the future of warfare by proxy. Panelists identified five specific lessons for consideration:

1. **Anything the US does needs to pass the “Washington Post” test.** In other words, DOD must assume that all proxy engagements will eventually become public knowledge. If and when this occurs, will the US be comfortable owning these relationships in the public eye?
2. **The US must prioritize human rights.** Concerns about human rights violations inevitably will be raised, especially when US activities become public. Protecting the integrity of human rights from the start will safeguard the sponsor/proxy relationship and prevent the sort of credible “bad press” that undermines even the most politically tenable influence activity.
3. **The US must think through the long-term sustainability of these proxy groups, or else plan for their disarmament and demobilization.** This is especially critical when sponsoring a group that is largely reliant on its sponsor. Failure to plan for a peaceful conclusion to proxy activities can leave fragile regions vulnerable to future discord. Poor post-conflict restructuring creates a space primed for problems with weapons proliferation, predatory foreign influence, and internal political instability.

Callousness toward the long-term well-being and success of proxies is not only a human rights issue, but can also damage the sponsor’s reputation and relationship with its former partner force (not to mention prospective future forces). For example, this sort of irresponsible sponsorship occurred in Afghanistan after the US terminated its involvement with the mujahedeen, and the aftershocks of that experience influence US-Afghan relations to this day.

4. **The US must invest in ethnographic mapping of the proxy environment.** Effective proxies are typically groups whose internal motivations and objectives are relatively well aligned with the goals of their sponsors. When the two entities share interests, it is easier to establish a strong sponsor/proxy partnership. Entities that become proxies only to access material benefits are little more than local mercenaries, and they have fewer incentives to commit to long-term regional goals. For example, generations of ethnic resentment fueled the Hmong people’s willingness to engage the North Vietnamese Army on behalf of the US. Those underlying attitudes prevented mass defection even in the face of hardship and high casualties. When encouraging local actors to combat one another, it is essential to collaborate with proxies who have a

natural inclination to fight the sponsor's enemy. Forces with no intrinsic sociopolitical motivations are unlikely to facilitate a mutually beneficial proxy relationship over an extended period.

5. **The US must screen partner forces for local legitimacy before extending sponsorship.** Understanding the region's political-military environment is essential for choosing a proxy force. Two examples include the Syrian Defense Forces and the tribal leaders involved in the Anbar Awakening; both were generally seen as legitimate actors by their local communities. Natural authority improved their ability to operate as effective local forces. Conversely, the Nicaraguan Contras had very little local legitimacy and, accordingly, underperformed as a proxy. Optics matter, and as one participant noted, "having the perceived authority to do the job is as important as doing the job."

"Moving forward," one speaker summarized, "[the unconventional arena] is where war will exist predominantly." As SOF retool their portfolio to reflect the enhanced importance of influence operations, they would greatly benefit from incorporating these old lessons and new innovations.

The Future of SOF and the American Narrative in an Irregular Competition for Global Influence

The traditional concept of a nation state is rapidly evolving. "Those of us who spent years studying Westphalia," one speaker remarked, "[are] now peeling that back and realizing that a state is a collection of individuals with cellphones. That changes the concept of borders, satellites, constraints." The dawn of great power competition via irregular means is challenging US supremacy, and malign actors' influence threatens to dilute US global strength.

The US can combat this trend by establishing a modern form of IW and investing in the entities to engage in it. This would involve honing SOF's UW portfolio to create the capabilities required for success in today's battlespace. "The problem won't go away," one participant stated. "We have a force that is world-class in hyper-conventional and commando operations...but that is very different from conducting day-to-day influence networks and connecting with like-minded, persuadable organizations around the globe. Shift the focus to enduring timelines versus one-off hits." This pivot does not need to be complete—participants recognized that conventional capabilities remain important components of global power and are essential for winning an outright war. However, if we find ourselves in a situation of mutual nuclear and conventional deterrence—as some participants predicted—our strategy for maintaining US global standing also needs to reflect the enhanced importance of everyday irregular actions in support of great power competition. SOF remain the military entity most aligned to conducting this mission.

Conclusion

We are in an era where great powers compete via influence operations, and the victor is the one who controls the narrative surrounding that competition. To succeed in this contest for power, we need to come to terms with our ideological strategy alongside our operations and tactics. In an arena where words are weapons, nations without a coherent and consistent message are defenseless. This reality presents the US with a challenge and an opportunity to reaffirm the core values of an American way of life: democracy versus authoritarianism, cohesiveness versus factionalism, freedom versus tyranny.

US SOF and their civilian partners will be critical actors in a battlespace where influence operations are of greater utility than conventional maneuvers in day-to-day activities. It is essential to invest in our unconventional specialists, develop decisive IW strategies, and install a dedicated civilian information agency to guide and collaborate with the special operations enterprise. Achieving these goals will enable SOF to successfully support the USG's efforts to meet these new challenges, and will equip the force with the tools it needs to simultaneously protect and project the message of the US in the global competition for influence.

Abbreviations

AMWG	Active Measures Working Group
DOD	Department of Defense
GPC	great power competition
IW	irregular warfare
NDS	National Defense Strategy
PMC	private military contractor
SME	subject matter expert
SOCOM	Special Operations Command
SOF	special operations forces
TTP	tactics, techniques, and procedures
USG	US Government
USIA	US Information Agency
UW	unconventional warfare

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This report was written by CNA's Strategy, Policy, Plans, and Programs Division (SP3).

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