

# Speak Smartly and Carry a Big Stick: Competing Successfully in the Global Narrative

**by Brian Anthony, Robert Lyons and Stuart Peebles**

## **Strategic Communications**

“Speak softly and carry a big stick; you will go far,” the 26th President of the United States Theodore Roosevelt famously advised.<sup>1</sup> Notwithstanding the wisdom of Teddy Roosevelt, his advice may not ring true in the Twitter age. The U.S. government spends roughly 40 billion dollars on foreign aid annually – a pretty big stick by most standards – but struggles to generate a comparable amount of global goodwill.<sup>2</sup> Meanwhile, U.S. adversaries and near-peer competitors, such as the self-proclaimed Islamic State and Russia, have become bolder in their approach to shaping the global narrative. These nefarious actors destabilize the global security order while advancing an effective narrative that suggests the complete reverse.<sup>3</sup> How can U.S. interagency leaders compete with such effective adversary messaging and capitalize on U.S. development and defense efforts around the globe? The U.S. interagency community needs a streamlined theoretical framework to think about information power more proportionally; it also needs to take practical steps to nest informational efforts more soundly in U.S. strategy. In today’s environment, interagency leaders must speak *smartly* not softly in order to realize the best return on our hard-power global investments.

In 2008, U.S. Congressman Adam Smith (D-WA) recorded the main obstacles to effective U.S.

**Lieutenant Commander Brian Anthony, United States Navy, serves on the Joint Staff in the Pentagon. Prior to his current assignment, LCDR Anthony served as the Deputy Executive Assistant to the Deputy Chief of Naval Operations, Warfare Systems on the Navy Staff. LCDR Anthony earned his Master’s Degree in Systems Engineering from the Naval Postgraduate School.**

**Lieutenant Colonel Robert Lyons, United States Air Force, serves in the Office of the Secretary of Defense for Acquisition, Technology, and Logistics as a defense program analyst of Department of Defense major defense acquisition programs. He has an MA in Airpower Arts & Sciences from Air University’s School of Advanced Air and Space Studies and an MS in Chemical Engineering.**

**Major Stuart Peebles, U.S. Army, serves as Assistant Army Attaché in Cairo, Egypt. Prior to his current assignment, MAJ Peebles served as Assistant Army Attaché in Kabul, Afghanistan. MAJ Peebles has a BS from the United States Military Academy at West Point and an MA in Global History from Georgetown University.**

strategic communications: “The U.S. doesn’t have a coherent, high-level interagency strategy. The State Department and Defense Department aren’t coordinating sufficiently; and we lack focus and nuance in our strategic communication messaging.”<sup>4</sup> Roughly a decade after Smith’s diagnosis, the problem is still acute.

Government watchdogs recently lampooned *WebOps*, a multi-million dollar information operations program at U.S. Central Command.<sup>5</sup> The program involves specialists who scour popular Arabic social media sites for potential radical Islamic recruits. In theory, when the specialists find a likely recruit, they present the susceptible youth with a more moderate, alternative perspective. In practice, the program has been crippled by operators who lack the necessary linguistic and cultural acumen to be effective. Many of them have trouble with basic Arabic vocabulary, let alone the nuance required to discuss theology with both Sunni and Shia Muslims. Lack of proper oversight has compounded the problem of evaluating such a program, which has been reporting its own success using dubious methods.<sup>6</sup>

Central Command is preparing to spend 500 million dollars more on similar programs in the coming years.<sup>7</sup> In addition, the U.S. is failing to challenge rampant international conspiracy theories of U.S. malevolence. For example, one of the more insidious lines of thought popular in Iran is that the U.S. deliberately created ISIS in order to weaken the Middle East.<sup>8</sup> These are but two instances among many of how current U.S. efforts to inform the global narrative have had questionable effectiveness.

The U.S. government has not always been poor at leveraging information to bolster national power. From its inception, the U.S. demonstrated creative ways to influence the strategic narrative. During the American Revolutionary War, the British commander in the Carolinas complained that large parts of the populace never heard about his thrashing of the colonists at the battle

of Camden because the Americans violently threatened anyone who spoke of the battle.<sup>9</sup> In addition, the Americans effectively disseminated editorial cartoons to paint the British as oppressors while also generating more support for independence.<sup>10</sup> By combining such savvy information operations with creative operational maneuver, the American rebels forced the British to cede their American colonies.

**The U.S. government has not always been poor at leveraging information to bolster national power.**

During the Second World War, the U.S. federal government hired Walt Disney to produce numerous films to bolster domestic support and troop morale for the war effort.<sup>11</sup> During the Cold War, the U.S. was able to win the “war of ideas” through establishing the U.S. Information Agency, Voice of America, and Radio Free Europe.<sup>12</sup> Thus, the current U.S. strategic communications difficulties are a historical aberration. How did our opponents – Russia and the Islamic State, for instance – get the upper hand and how can we regain the initiative?

### **Russia: A Sophisticated State Communicator**

***Russia seeks to create adversarial opinions of the NATO alliance by inferring that our ships and aircraft are encroaching on Russian territory in an attempt to threaten their homeland.***<sup>13</sup>

**- Vice Admiral James Foggo III**

While U.S. strategies in shaping the global narrative lag, Russia appears to be capitalizing on the information revolution. Senior leaders in the Russian government have made no secret about their choice to emphasize information in their grand strategy. General Valery Gerasimov,

Chief of the General Staff of the Armed Forces of Russia, explained in an article from 2013: “Information warfare opens wide asymmetric possibilities for decreasing the fighting potential of an enemy.”<sup>14</sup>

Some strategists in the U.S. are going so far as to name the new Russian emphasis on ‘information warfare’ the Gerasimov Doctrine.<sup>15</sup> Russian President Vladimir Putin has also been sanguine about the broader power of controlling the narrative. In October 2014, he described his state-sponsored news channel *RT* (formerly *Russia Today*) as “a formidable weapon enabling the manipulation of public opinion.”<sup>16</sup>

## The Russian mouthpiece has a budget rivaling the BBC...

The Russian mouthpiece has a budget rivaling the BBC with channels in English, Spanish, Arabic, and of course Russian; it also has more YouTube viewers than any other international news channel.<sup>17</sup> Between Putin’s “weaponizing” of *RT* and Gerasimov’s information warfare doctrine, Russian leaders have been unified in their effort to leverage information in support of their muscular foreign policy.

The Russian information campaign has worked particularly well in some of the former Soviet republics. After annexing Crimea in 2014, the Russians immediately began a coordinated effort to control the narrative. Within Crimea itself, the Russians censored the media to forestall any opposition to their operations.<sup>18</sup> Beyond Crimea, the Russians energized their robust network of media channels and affiliated non-governmental organizations “to justify Crimea’s ‘return’ to Russia.”<sup>19</sup> Russian messaging regarding its actions in Crimea paid dividends. Soon after the annexation, a Gallup poll showed that most of the people in the former Soviet republics were inclined to support

Russia’s policy towards Crimea.<sup>20</sup> Presidential elections in Bulgaria and Moldova in 2016, also seem to validate Russian information efforts, as the new leaders of both countries are decidedly pro-Russian.<sup>21</sup> Many of the people in those former Soviet states also look admiringly to the east. Two thirds of the respondents to a recent poll in Moldova said that they “trusted” Vladimir Putin, while less than one third felt the same way about German Chancellor Angela Merkel.<sup>22</sup> In the cases of Bulgaria and Hungary, their move towards Russia is particularly concerning for the U.S., considering their membership in the North Atlantic Treaty Organization. Having such Russophile allies could complicate future operations.

Despite evidence of Russian success in targeted information operations, the net result of Russian efforts is mixed. In 2015, a research team queried households in the former Soviet republics of Ukraine, Azerbaijan, and Kyrgyzstan, as well as Russia itself in order to gauge the influence of Russian propaganda.<sup>23</sup> Within Ukraine, Russian messages have largely fallen on deaf ears. Ukrainians do *not* believe Russian claims that the U.S. fomented the instability in Ukraine.

In Azerbaijan, some elements of the Russian narrative have swayed the populace, while others have not. Roughly one third of Azeris view Russia as “a partner or ally,” while one quarter view the U.S. in the same terms.<sup>24</sup> Kyrgyzstan recorded the most pro-Russian views of the former Soviet republics. Unsurprisingly, over 75 percent of Kyrgyz people consume their daily news from Russian television sources. Despite such a one-sided media diet, Kyrgyz people strongly support core democratic principles that Russian messages discourage.<sup>25</sup> Within Russia, domestic opinion showed much higher rates of anti-Americanism than in the former Soviet republics, but Russians still do not buy all elements of the Russian narrative that the Kremlin is peddling.<sup>26</sup> These mixed results

reveal vulnerabilities in the Russian narrative that the U.S. could exploit in pursuit of its national interests.

### **Islamic State of Iraq and as-Sham: Effective Non-state Communicator**

***This broader challenge of countering violent extremism is not simply a military effort. Ideologies are not defeated with guns, they are defeated by better ideas and more attractive and more compelling vision. So the United States will continue to do our part by continuing to counter ISIL's hateful propaganda, especially online.***<sup>27</sup>

**- 44th U.S. President Barack Obama**

Like Russia, the Islamic State of Iraq and as-Sham (ISIS) demonstrates proficiency in strategic communication. ISIS employs production quality digital communications that would rival the best of Hollywood movie studios or Madison Avenue marketing firms. With strategic communications, ISIS reinforces its ideological narrative, inspires attacks, supports a global recruiting effort, and executes terror operations of global reach. Even the organization's name "ISIS" provides a measure of gravitas by incorporating the term "State" which suggests a fait accompli to state-like legitimacy. For ISIS, strategic communication is central to grand strategy.

ISIS' high priority on strategic communication is evident by the emphasis of media operations in their masterplan for creating the Islamic State. The ISIS doctrine describes the importance of complementing ISIS operations with robust media coverage.<sup>28</sup> Of note, their doctrine applies lessons-learned about America's information approach to win the Iraq War. Specifically, ISIS doctrine mentions how the United States used strategic communication during the Iraq War to portray a Sunni caliphate "as a treacherous terrorist state of hypocritical political projects, with great marshalling of

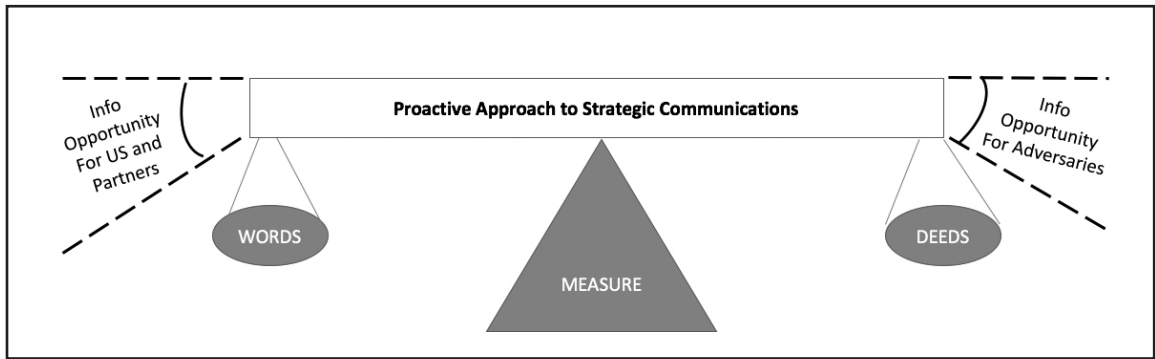
the media to accomplish that."<sup>29</sup> By having a doctrine, ISIS seeks to ensure that others don't define them and that they maintain the edge through aggressive strategic communications.

While the U.S. takes the fight to ISIS in the physical domain in Syria and Iraq, ISIS has demonstrated operational reach into the U.S. and throughout the rest of the world through the information domain.

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In the summer of 2016, the U.S. FBI Director asserted that the U.S. had over 1,000 open cases involving ISIS threats within the U.S.<sup>30</sup> In 2016, ISIS inspired or linked to over 80 attacks throughout North Africa, the U.S., and Europe.<sup>31</sup> In 2015, ISIS claimed responsibility for a terrorist attack in Paris that killed over 120 people.<sup>32</sup> Many of these operations were accompanied with a social media statement and video. The attackers became radicalized by ISIS' ideological narrative. Until the U.S. contests ISIS' ideological narrative, these types of threats will persist to the U.S. homeland, allies, partners, and many other nation states for decades. As recently as February 2017, General David Petraeus testified to Congress that the U.S. has to do more to discredit ISIS ideological narrative otherwise military victories in Iraq and Syria would be "fleeing."<sup>33</sup>

Defeating the Islamic State in Iraq and as-Sham (ISIS), also known as Daesh, remains a top priority for the U.S.<sup>34</sup> In January 2017, the White House issued National Security Presidential Memorandum-3 (NSPM-3) that requires a whole of government approach to combatting ISIS. NSPM-3 directs the application of "public diplomacy, information operations, and cyber



**Figure 1. Proactive Approach to Strategic Communications.**

strategies to isolate and delegitimize ISIS and its radical Islamist ideology.”<sup>35</sup> Certainly, President Trump’s administration can build upon the Obama administration’s creations, such as the Global Engagement Center at the Department of State.

The Global Engagement Center uses third party organizations to compete with Daesh strategic communications. State’s new Center aims to have more engagement with third parties and people that can actually engage with humans on social networks, not just post messages at them; and it will use data to tailor messages and campaigns. The Center will also provide seed funding and other support to NGOs and media startups focused on countering violent extremist messaging.<sup>36</sup> The Global Engagement Center implemented more content in Arabic than English and contests ISIS in more places on the internet.<sup>37</sup> As a result, ISIS has lost over 45% of its Twitter presence and deals with a 6:1 ratio of anti-ISIS to pro-ISIS propaganda.<sup>38</sup> The GEC’s results are positive, and it should serve as a model for future initiatives.

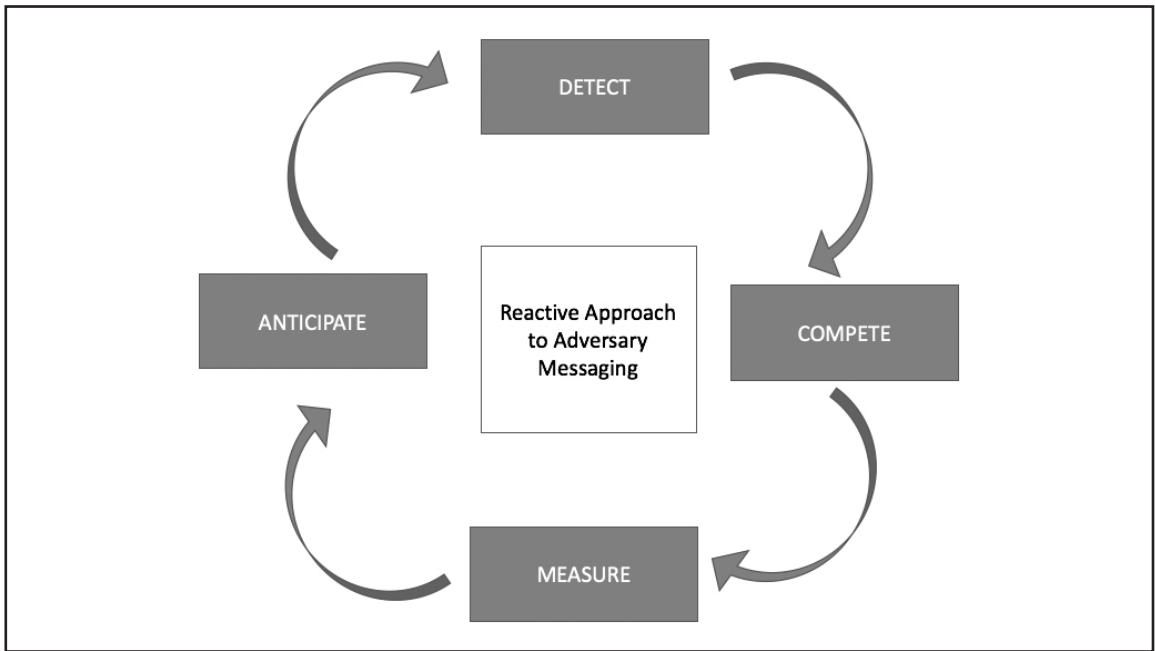
### **A Simplified Theoretical Framework for Strategic Communications**

***In today’s information age, success is the result not merely of whose army wins but also of whose story wins.***<sup>39</sup>

**- Dr. Joseph Nye**

In order for the U.S. to compete with the stories of its adversaries – be they state or non-state – policy makers and strategists should think about power more broadly and speak “smartly.” Current joint doctrine from the Department of Defense on information operations contains models designed to help commanders and their staffs think this way.<sup>40</sup> However, these models over-complicate the matter and obfuscate more than clarify.<sup>41</sup> A better way to think about speaking smartly is to use what Nye calls “contextual intelligence” to combine soft and hard power in effective ways.<sup>42</sup> Interagency leaders should use a more proportional approach to blend its resources for such activities as strategic communications and military operations/development. The joint and interagency community needs new models to think about how to combine soft and hard power, specifically *words* (information power) and *deeds* (military or development power).

Figure 1 depicts a simple way for the joint and interagency community to think about strategic communications in a *proactive* manner. The crossbar represents the proportional effort between what the U.S. and its partners “say” (i.e. information efforts) and what they “do” (e.g. military or development efforts). If there is a hypocritical mismatch between words and deeds, then U.S. adversaries have informational leverage. As noted by Admiral Michael Mullen, a former Chairman of the Joint Chiefs of Staff, “We hurt ourselves more when our words don’t



**Figure 2. Reactive Approach to Strategic Communications.**

align with our actions. Our enemies regularly monitor the news to discern coalition and American intent as weighed against the efforts of our forces. When they find a ‘say-do’ gap—such as Abu Ghraib—they drive a truck right through it. So should we, quite frankly.”<sup>43</sup> The reverse is also true. If the U.S. is using its military and development power to conduct *deeds* in a manner that promotes global stability and security, then it should also leverage information power or *words* in a proportional manner to achieve maximal effect.

Figure 2 depicts a streamlined way for interagency leaders to think about strategic communications in a *reactive* manner. The process begins with *anticipating* what types of negative messages the adversary will likely employ to various audiences and developing options for response. The next step is to *detect* these messages and measure their “stickiness” in traditional and social media using analytics.<sup>44</sup> The third step, if necessary, is to *compete* with adversary messaging using well-crafted, thoughtful, and targeted responses that are grounded in reality. The fourth step in this

iterative process is to *measure* the effectiveness of U.S. and partner messages, again using analytics.

These two models assume some capabilities that the U.S. currently lacks. First, accurate measurement of the “stickiness” of adversary messaging, as well as U.S. messaging, takes bona fide cultural and linguistic experts. This measurement process will have a technical and quantitative aspect, but will also be somewhat subjective. Similar in methodology to political polling, this measurement process will be only a rough estimate of what the target audience thinks.

The joint and interagency community must also develop “contextual intelligence” to assess the necessary balance of military/ development and informational efforts throughout both proposed models.

Finally, the entire process involves *disciplined* interagency communicators who know the appropriate message to deliver and who emphasize that message in appropriate settings.



## Practical Steps to Better U.S. Strategic Communications

Interagency leaders not only need simplified theoretical frameworks, they also need to take concrete, practical steps to improve the nation's use of information in its overall strategy. For the U.S. to achieve its national interests on the global stage, the interagency community must provide clearer ends, greater means, and more adaptive ways in the information realm.

**The U.S. must respond publicly and vigorously to high-profile Russian falsehoods, while constantly re-emphasizing the regime's suppression of independent media in Russia.**

### Clearer Ends

#### *1. Refer to "ISIS" without using the term "State."*

In their U.S. strategic communication, U.S. civilian and military leaders should refer to the Islamic State in Iraq and Syria, the Islamic State in Syria and Levant, the Islamic State of Iraq and as-Sham, and any other form that includes the term "state" simply as Daesh.<sup>45</sup> By eliminating the term "state," the U.S. removes the perception of legitimacy.<sup>46</sup> A good example occurred during the joint press conference between the Prime Minister of Great Britain, Theresa May, and U.S. President Donald Trump. The Prime Minister mentioned working with the U.S. to "take on and defeat Daesh and the ideology of Islamist extremism wherever it's found."<sup>47</sup> This is consistent with other European leaders. Since October 2014, the French refer to the organization as Daesh.<sup>48</sup> In contrast, the President used the term "ISIS" at the press conference.

The Department of Defense (DoD) recently addressed the term "ISIS." In February 2017, the

DoD Public Affairs released guidance to refer to ISIS as the Islamic State in Iraq and ash-Sham. Before completely eliminating the term, speakers should first associate the term "Daesh" with "ISIS," because most Americans probably recognize ISIS instead of "Daesh."

#### *2. Reveal the truth about Russia's strategic communications.*

To address Russian Strategic Communications, the U.S. must focus on how Russia is providing inaccurate information and misinformation to the world. The U.S. must respond publicly and vigorously to high-profile Russian falsehoods, while constantly re-emphasizing the regime's suppression of independent media in Russia.<sup>49</sup> By doing so, the U.S. challenges Russian credibility, and highlights the lack of free press. It is important that when the U.S. responds, actual and factual data are provided, to show that Russia is not being truthful in their accounts. Vice Admiral James Foggo III, former U.S. Sixth Fleet Commander, provides an example on this subject:

One such instance of this misinformation campaign occurred when the USS Ross (DDG-71) was operating in the Black Sea. Russia's international news agency RIA Novosti, quoting an anonymous source, reported that the Ross was acting "provocatively and aggressively." Admiral Mark Ferguson, Commander, U.S. Naval Forces Europe-Africa/U.S. 6th Fleet (CNE-CNA/ C6F), countered the misinformation using Twitter and published a video of the interaction on YouTube. That video showed how sailors of the Ross were navigating in the Black Sea when they observed SU-24s flying over in a routine nature. The Ross bridge team kept course and speed throughout the interaction. The world was so intrigued by what had originally been titled "provocative" behavior that people flocked to the YouTube page to see for themselves how it all played out.<sup>50</sup>

## Ties To Russia

The Kremlin says Moscow will strive to protect the interests of Russians and Russian speakers wherever they may be. We look at the regions where the greatest concentrations of Russian citizens, ethnic Russians and native Russian speakers live, outside the borders of the Russian Federation.



Figure 3. Countries with large ethnic Russian populations.<sup>56</sup>

Once the U.S. released this video, Russia backed off of its claims of this “provocative” encounter, and their tally of falsehoods increased. The world is beginning to take note of Russia’s misinformation tactics, and analysts say Moscow is losing credibility because of it. Surveys found that between 2013 and 2014 negative views of Russia rose from 54 to 74 percent in Europe, with the country’s reputation failing to improve in any corner of the globe.<sup>51</sup>

The U.S. should publicize Russian support for Western media outlets and their involvement in Western civil society, and if their support is overt, the U.S. should emphasize it. If it is covert, then Russian support should be publicized to the extent that is allowable with the security of intelligence sources. The goal in either case is to deprive these outlets of their credibility, thereby depriving the Russian government of its credibility.<sup>52</sup>

## More Adaptive Ways

### 1. Build competing narratives with the help of true experts.

In its strategic communication, the U.S. should incorporate the testimonies of people with firsthand, negative experiences with ISIS.<sup>53</sup> Those who suffered under ISIS have compelling stories that would undermine ISIS’ credibility with potential recruits and sympathizers. An ISIS defector’s credibility has more chance of resonating with an extremist who questions their resolve to an Islamist cause while holed up at a base in Syria. Their experience is more likely to hit home with teenagers trawling over extremist chat rooms in the dark, and more relatable than any upper middle class white politician or inexperienced prevention officer.<sup>54</sup> Furthermore, those former ISIS members helping the U.S. should be taken care of, which would further U.S. strategic communications. The government needs to support defectors, by helping them reintegrate to a post-extremist lifestyle and by



providing them with an opportunity to help others who have travelled down the same path.<sup>55</sup>

The U.S. should seek assistance, advice, and leadership from citizens who speak the Arabic language, who have deep familiarity with the cultures of nations afflicted by ISIS, and who also have passion to see ISIS defeated. Many first-generation American Muslims fled the Middle East and Afghanistan for freedom and to escape oppressive religious organizations such as ISIS and the Taliban. This group of people could be a resource for contesting ISIS' narrative. Similarly, Middle Eastern nations have people who could assist with defining ISIS' narrative and identifying ways to address and counter it.

**To avoid being reactive during a conflict, the U.S. and NATO should consider how Russia might apply strategic communication and prepare competing messages in advance.**

## *2. Anticipate, be proactive with Strategic Communication plans.*

The U.S., NATO partners, Ukraine, and other nations should prepare strategic communication plans in advance of potential Russian shaping and follow-on military operations. It's no mystery where Russia might act next on the globe.<sup>57</sup> One simply has to compare and contrast maps of Soviet Russia with today's Russian Federation. With the collapse of the Berlin Wall, Russia's borders and sphere of influence retracted leaving several nations that have large Russian ethnic populations outside of Russia's control. These include Ukraine, Belarus, Moldova, Kazakhstan, Estonia, and Lithuania (see Figure 3). Based on experience with eastern Ukraine and Crimea, Russia would likely use an aggressive strategic communication campaign to foment unrest in those countries, discredit governments and leaders, and justify any overt Russian operations

as "peacekeeping operations" to protect ethnic Russians.

To avoid being reactive during a conflict, the U.S. and NATO should consider how Russia might apply strategic communication and prepare competing messages in advance. Coalition and interagency leaders should rehearse such contingencies during table top exercises to examine specific Russian strategic communications, predict content, develop competing content, and evaluate the effectiveness of counter-strategic communications. Similar to the approach with ISIS, the United States government can include Russian experts, American citizens, NATO partners, and others to develop these strategic communication plans.

## **Greater Means**

### *1. Capitalize on the recently passed Countering Propaganda Bill.*

This December 2016 bill creates a grant program for non-governmental organizations, think tanks, civil society and other experts outside government who are engaged in counter-propaganda related work to better leverage existing expertise and empower local communities to defend themselves from foreign manipulation.<sup>58</sup> This bill also makes the State Department the lead agency, but more importantly it allows organizations outside the government to be more vocal in addressing Russia and ISIS. Interagency leaders should become conversant with the intricacies of this bill – including its authorities and restrictions – in order to understand how their organizations and implementing partners fit into its funding framework.

### *2. Leverage Big Data to detect, characterize, and monitor ISIS' ideological narrative.*

Countering a narrative requires understanding what that narrative is, where to contest the narrative (physically and virtually),

and knowing about the target audiences. “Big Data” can help with all three. Pouring more resources into “Big Data,” including analytics and algorithms, would enable the U.S. to accelerate operations to address the strategic communications of ISIS and Russia. In 2015, a small company applied “Big Data” to estimate the population size susceptible to radicalization and the typical profile of an ISIS recruit.<sup>59</sup> By using “Big Data” to recognize patterns on social media, the firm’s results indicate approximately 71,000 people ripe for radicalization.<sup>60</sup> Furthermore, data show the typical Western recruit is male, in his 20s, from middle-to-upper class families, and educated.<sup>61</sup> Clearly, having this type of information would help focus strategic communication. “Big Data” tools could also be used to scour social media content that is in Arabic for ISIS’ broad themes, trends, and interest areas. For example, an individual has voluntarily translated many ISIS social media posts to illuminate the organization’s various activities ranging from education, administration, calls to arms, and many others. “Big Data” tools could accelerate this type of work.

Additionally, there is a lack of analysis, comparing and assessing already-implemented government strategies. There should be a list of best practices, and while there are some solid comprehensive strategies, such as *Winning Information Warfare* by CEPA, very little policy assessment has been produced thus far.<sup>62</sup> Building and sharing this database helps push resources to focus on the right problem set.

### ***3. Support and Expand beyond the Department of State’s Global Engagement Center.***

In addition to full and optimal use of the Global Engagement Center and its assets, the U.S. should use organizations like the Broadcasting Board of Governors to address Russian and ISIS strategic communications. The U.S. should set up various media sources that allow America to take the lead in strategic communications, vice merely competing against Russian strategic communications. This approach would entail use of public diplomacy to address anti-American and pro-Russian propaganda by the Russian government. Efforts should include international broadcasting, a new Russian satellite channel, the Internet, social networking, print media, and revamped academic exchange programs.<sup>63</sup> This will not only allow the U.S. to have both a constant voice in Russia and in countries that receive a lot of Russian media, but also will allow individuals in those areas (as seen in Figure 3) to have access to Western media.

## **Conclusion**

U.S. strategic communications is as important today as it was during the World Wars. With a simplified theoretical framework and practical changes in strategy, U.S. interagency leaders can improve their use of information power in order to take back the initiative in the information realm from our adversaries. A more proportional blend of informational and defense/developmental efforts will enable the interagency to pursue U.S. national interests more successfully. Over the last year, the U.S. has taken steps to achieve this desired end state. The Global Engagement Center is a step in the right direction in addressing U.S. strategic communications. Additionally, the passing of the Counter Propaganda Bill, which opens up more resources and avenues for the U.S. to address shortfalls that have caused the U.S. to give ground to Russia and ISIS, further advances U.S. progress toward goals of information dominance. Interagency leaders should build upon the positive frameworks that these two initiatives represent. Unless we leverage the appropriate blend of strategic communications with U.S. hard power, we will continue to miss opportunities to speak “smartly.” **IAJ**

## NOTES

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