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MASTER OF MILITARY STUDIES

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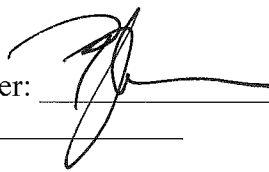MASTER OF MILITARY STUDIES

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EXECUTIVE SUMMARY

Title: The Matryoshka Doll: A Model for Russian Deception, Disinformation, and Chaos

Author: Major Tyler C. Quinn, United States Marine Corps

Thesis:
In the age of information, the proliferation of "new media," defined as social media plus mobile technology, has presented new and ingenious opportunities for states like Russia to gain power through a combination of "malicious" soft power and sharp power by layering deception, political warfare (PW), information warfare (IW), cyber, and military action, much like a *matryoshka* (nesting doll) to undermine faith in the democratic system and gain a competitive advantage against perceived adversaries. Russian actions in Ukraine provide an opportunity to evaluate the layers of the *matryoshka* and Russia's primary use of PW and IW to achieve success.

Discussion: As a revisionist power Russia frequently employs "malicious" soft power and sharp power to achieve a position of advantage. They view the informational realm as having primacy, and therefore employ a combination of PW and IW to achieve their goals. The Kremlin holds PW and IW at such high value due to their deep and conflicted history with the West, as well as their own people. Russian leaders often portray a view that Russia is consistently marginalized or taken advantage of by the West. Particularly they view the bordering states, especially Ukraine, as not only key strategic buffers but always having been part of the motherland. In the light of the changing global environment and military modernization, General Gerasimov published a "doctrine" calling for 4:1 ratio of nonmilitary actions to military actions. This is in line with the focus on PW and IW, only utilizing military means to consolidate and ensure success while assuming the least amount of risk through "malicious" soft balancing. Russia employs a layered model, *matryoshka*, of reflexive control and disinformation to exploit gaps and create chaos, thus creating the pretense to act with political legalistic arguments and achieve strategic territorial gains. The annexation of Crimea and actions in Ukraine in 2014 provide a case study for Russia employing this layered model in real-time. By evaluating the goals, audiences, methods, and results we can see Russia is perfecting their model of chaos and disinformation.

Conclusion: Russia is a revisionist power seeking to maintain their sphere of influence over what they perceive to be "lost" strategic territory. They will continue to utilize PW, IW, and cyber as the main effort to undermine democratic societies and gain or maintain a competitive advantage. The US, NATO, and their allies and partners need to recognize and counter this revisionist power to prevent further destabilization.

DISCLAIMER

OPINIONS AND CONCLUSIONS EXPRESSED HEREIN ARE THOSE OF THE INDIVIDUAL STUDENT AUTHOR AND DO NOT NECESSARILY REPRESENT THE VIEWS OF EITHER THE MARINE CORPS COMMAND AND STAFF COLLEGE OR ANY GOVERNMENTAL AGENCY. REFERENCES TO THIS STUDY SHOULD INCLUDE THE FOREGOING STATEMENT

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Preface

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Introduction

Russia wants to be a strong global player but views their position in the world from a zero-sum standpoint and looks like they are trying to balance against the U.S. to regain a position of power.[1] The post-Cold War world construct continues to be stressed by revisionist powers. According to Walter Russell Meade, "in very different ways, with very different objective, China, Iran, and Russia are all pushing back against the political settlement of the Cold War."[2] Meade identifies Russia as the "middling revisionist" power and notes Putin's success in occupying Ukraine as the latest step to keep prior Soviet states firmly in Russia's orbit effectively turning Eastern Europe into a "[Z]one of sharp geopolitical conflict and made stable and effective democratic governance impossible outside the Baltic states and Poland."[3] Further, Russia "sees themselves as victims of a sustained unconventional, information warfare campaign by the United States," as Dr. Brandon Valeriano, Benjamin Jensen and Ryan Maness note this "mirror imaging heightens this preference for manipulation."[4] Soviet active measures (*aktivnyye meropriyatiya)*, reflexive control, and deception (*maskirovka)* are antecedent to the post-Cold War Russian disinformation (*dezinformatsya)* actions employed today.[5] While the employment of these strategies is not new the Kremlin is blending novel techniques with emerging technology ever so slightly to avoid direct correlation to the Soviet model.

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[1] Jack Snyder, "One World, Rival Theories," *Foreign Policy* (Nov/Dec 2004): 53; Stephen Kotkin, "Russia's Perpetual Geopolitics: Putin Returns to the Historical Pattern," *Foreign Affairs* 95, no. 3 (May/Jun 2016): 2-9; Robert A. Pape, "Soft Balancing Against the United States," *International Security* 30, no. 1 (2005): 7-45; T. V. Paul, "Soft Balancing in the Age of U.S. Primacy," *International Security* 30, no. 1 (2005): 46-71.

[2] Walter Russell Mead, "The Return of Geopolitics: The Revenge of the Revisionist Powers," *Foreign Affairs* 93, no. 3 (May/June 2014): 71.

[3] Ibid 73.

[4] Brandon Valeriano, Benjamin Jensen, and Ryan C. Maness, *Cyber Strategy: The Changing Character of Cyber Power and Coercion* (New York: Oxford, 2018), 204.

[5] For more on active measures see Richard H. Shultz and Roy Godson, *Dezinformatsia: Active Measures in Soviet Strategy* (McLean, VA: Pergamon Press, 1984). For more on reflexive control see Timothy Thomas, "Russia's Reflexive Control Theory and the Military." *Journal of Slavic Military Studies* 17, no. 2 (April, 2004): 237-56.

In February 2013 Russian Chief of the General Staff of the Russian Federation Armed Forces, General of the Army Velery Gerasimov wrote the article "The Value of Science is in the Foresight" in *Military -Industrial Kurier*.[6] Following Russian actions in Ukraine in 2014 this document seemed prescient in describing a doctrine the West has dubbed "hybrid" warfare, but is more appropriately named "new generation warfare." General Gerasimov observes the changing character of war saying, "The information space opens wide asymmetrical possibilities for reducing the fighting potential of the enemy."[7] In the age of information, the proliferation of "new media," defined as social media plus mobile technology, has presented new and ingenious opportunities for states like Russia to gain power through a combination of "malicious" soft power and sharp power by layering deception, political warfare (PW), information warfare (IW), cyber, and military action, much like a *matryoshka* (nesting doll) to undermine faith in the democratic system and gain a competitive advantage against perceived adversaries. Russian actions in Ukraine provide an opportunity to evaluate the layers of the *matryoshka* and Russia's primary use of PW and IW to achieve success.

1. Power Politics

Realism

It is important to frame Russian actions within a theory of international relations, realism, to better understand their motivations and goals. Historically, humans create organizations and systems to exert or explain order from chaos. Organizations, like the nation-state, formed and systems of governance developed. But, how do these organizations interact within a system? The ancient Greek Thucydides attempted to explain human nature and the sources of motivation for

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[6] This article was later translated by Rober Coalson, editor, Central News, Radio Free Europe/Radio Liberty in 2014, and published in *Military Review* in 2016.
[7] Valery Gerasimov, "The Value of Science is in the Foresight," *Military Review* 96, no. 1 (Jan, 2016): 27.

nation-states through fear, honor, and interest. Machiavelli and Hobbes noted similar core

motivations for humans and thus human organizations.[8] These historic figures form a core school

of thought of power politics, or *realpolitik*, known as realism, one of two major schools of

thoughts regarding international relations theory.

Power politics, or realism, has had many theorists, but there are a few common threads

that allow for a general definition. Jack Donnelly fuses the various viewpoints of realism into

major points by saying:

> Whatever their other disagreements, realists are unanimous in holding that human nature
> contains an ineradicable core of egoistic passions; that these passions define the central
> problem of politics; and that statesmanship is dominated by the need to control this side
> of human nature. Realists also stress the political necessities that flow from international
> anarchy.[9]

Essentially human nature is inherently self-interested, and the status quo of the world is one of

chaos. States act in competition with one another to gain or maintain power for survival.[10] As

Joseph Nye said, "Power is the ability to affect others to obtain the outcomes you want."[11] To

that end there are basically three main categories of power, hard (coercive), soft (persuasive),

and smart (combination). Although recent revisionist actions by China and Russia have led to the

development of a fourth, sharp power.

Hard and Soft Power

Traditionally, in both multipolar and bipolar systems, states have employed the strategy

of hard-power, which is a direct strategy that includes the formation of alliances, military and

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[8] Jack Donnelly, *Realism and International Relations* (Cambridge, UK: Cambridge University Press, 2000), 43.
[9] Donnelly, 10.
[10] Snyder, "One World, Rival Theories," 55; Michael Sheehan, *The Balance of Power: History and Theory* (London: Routledge, 1996), 12.
[11] Joseph S. Nye, "Public Diplomacy and Soft Power," *The Annals of the American Academy of Political and Social Science* 616 (March, 2008): 94, http://www.jstor.org/stable/25097996.

arms buildup seeking to meet strength with strength.[12] The focus of hard power is on states'

ability to apply coercive means to change how others act. These means are often military force or

economic sanctions.[13] Conversely soft power is more persuasive in nature and attempts to co-opt

others' preferences. Nye identifies a state's three primary resources of soft power as, "[I]ts

culture (in places where it is attractive to others), its political values (when it lives up to them at

home and abroad), and its foreign policies (when they are seen as legitimate and having moral

authority)."[14] But most states or groups do not rely solely on one form of power.

Smart Power

In 2004 Nye defined smart power as, "the ability to combine hard and soft power

resource into effective strategies."[15] A key note is that unlike hard power which rests on a state's

ability to coerce through military or economic force, and soft power which is focused mainly on

diplomatic means, smart power is available to any state and even non-state actors. The

application of smart power is not necessarily new, but as Nye states, "Power in a global

information age, more than ever, will include a soft dimension of attraction as well as the hard

dimensions of coercion and inducement."[16] States will do this in different ways, and more states

will apply elements of power in novel ways to achieve relational advantage.

"Malicious" Soft Power and Sharp Power

Rising powers especially seek to utilize "malicious" soft power, which is aimed at

achieving effects with the lowest possible risk. The key distinction with soft power is that the

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[12] Pape, "Soft Balancing," 9; Paul, "Soft Balancing," 58.
[13] Ernest J. Wilson, "Hard Power, Soft Power, Smart Power," *The Annals of the American Academy of Political and Social Science* 616 (March 2008): 114, http://www.jstor.org/stable/25097997.
[14] Nye, "Public Diplomacy," 96.
[15] Nye, *The Future of Power*. 23. For more on smart power see Nye, *Soft Power: The Means to Success in World Politics*, (New York: Public Affairs, 2004), 32, 147; and Suzanne Nossel, "Smart Power," *Foreign Affairs* 83, no. 2 (March-April 2004): 131-142.
[16] Nye, "Public Diplomacy," 107.

"malicious" employment involves the spread of information and disinformation to exert political influence.[17] Strategic political maneuvering to ensure relative advantage is key, and this is supplemented by the use of sharp power.[18]

Christopher Walker and Jessica Ludwig recently released a report discussing the rising authoritarian influence in the world, specifically China and Russia. The shaping and influence techniques utilized by such authoritarian states is "centered on distraction and manipulation," and cannot be simply defined as soft power, nor hard power. Rather, Walker and Ludwig describe these authoritarian influence efforts as, "'[S]harp' in the sense that they pierce, penetrate, or perforate the information environments of the targeted countries." [19] The goal is not necessarily to persuade audiences that Russia or China is so good, rather that the West, more specifically the US, is relatively worse. This is achieved by taking advantage of existing divisions in societies and manipulating the information they receive.

The Russian theory of victory is based on maintaining their sphere of influence and a buffer to NATO and the West through undermining democratic ideals and driving a wedge between the US and her allies and partners.[20] The Center for Strategic and International Studies

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[17] This definition is based on the Soviet strategy of reflexive control where-by one attempts to convince the enemy through the targeted filtering of information and disinformation.

[18] Joseph S. Nye Jr., "How Sharp Power Threatens Soft Power: The Right and Wrong Ways to Respond to Authoritarian Influence," *Foreign Affairs* (January 2018), https://www.foreignaffairs.com/articles/china/2018-01-24/how-sharp-power-threatens-soft-power?cid=int-fls&pgtype=hpg. Joseph Nye notes that Russia also uses soft power, but clarifies the difference by stating, "Sharp power, deceptive use of information for hostile purposes, is a type of hard power." Christopher Walker and Jessica Ludwig, "The Meaning of Sharp Power: How Authoritarian States Project Influence," *Foreign Affairs* (November 2017), https://www.foreignaffairs.com/articles/china/2017-11-16/meaning-sharp-power. The original creators of "sharp power" further expound on this concept by noting, "Authoritarian influence efforts are 'sharp' in the sense that they pierce, penetrate, or perforate the political and information environments in the targeted countries."

[19] Walker and Ludwig, "The Meaning of Sharp Power".

[20] Jeffrey Mankoff, "Russia's Latest Land Grab," *Foreign Affairs* (May 2014): 4-5; Peter Pomeranstsev and Michael Weiss, "The Menace of Unreality: How the Kremlin Weaponizes Information, Culture and Money," *The Interpreter*, Institute of Modern Russia (New York: Institute of Modern Russia, 2014): 9-12; For detailed analysis see Heather Conley, James Mina, Ruslan Stefanov, and Martin Vladimirov, *The Kremlin Playbook: Understanding Russian Influence in Central and Eastern Europe*, (New York: Center for Strategic and International Studies, 2016).

report *The Kremlin Playbook* says, "Russia seeks to gain influence over (if not control of) critical state institutions, bodies and the economy and to use this power to shape national policies and decisions."[21] The goal being destabilizing the liberal world order and creating chaos to gain regional advantage and distract from more aggressive moves within their sphere of influence. They achieve this through combining "malicious" soft power and sharp power methods and means.

2. Methods and Means

Political Warfare

Political Warfare (PW) is not a new concept, and the British rightfully identify this fact in their manual developed during World War II (WWII), *The Meaning, Techniques and Methods of Political Warfare*. As wars became more encompassing and included the civilian populace support political warfare became more vital as an instrument to be employed as part of the greater strategy. In their manual, the British describe political warfare as encompassing of the elements of psychological warfare, ideological warfare, morale warfare, and propaganda.[22] British viewed political warfare as part of a national strategy to be used against any enemy during armed conflict, which is very similar to the definition used for the purpose of this paper, "the forceful political expression of what a nation is about in a particular conflict."[23]

Later, in 1948, George Kennan released a classified Policy and Planning Staff Memorandum, defining political warfare as "[T]he employment of all means at a nation's

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[21] Conley, Mina, Stefanov, Vladimirov, *The Kremlin Playbook*, 1.
[22] British Political Warfare Executive, *The Meaning, Techniques, and Methods of Political Warfare*, (Great Britain: British Government, 1942) http://www.psywar.org, 2.
[23] Angelo M. Codevilla, "Political Warfare," in *Political Warfare and Psychological Operations: Rethinking the US Approach,* ed. Carnes Lord, and Frank R. Barnett (Washington, D.C.: National Defense University Press Publications, 1989), 79.

command, short of war, to achieve its national objectives."[24] The aims of political warfare are

primarily in shaping the environment, "[B]y creating risk and uncertainty for the target."[25]

Through coercive measure

During WWII aviation warfare, wireless radio and television, and the facsimile were new

technologies and capabilities that allowed for reaching a broader audience. These technologies

were fully integrated into U.S. Cold War strategies at the beginning. Eventually, as technology

advanced and communication methods became more sophisticated, the repertoire of political

warfare was advanced as well. Today, "new media" is the *motes operandi* for reaching a global

audience with a message, and secondary states have taken full advantage to include it in their

tool kit. They can gain power through control of information and influencing a perceived threat

through disinformation, among other methods of political warfare. In the information age Russia

is seeking to utilize older methods of PW in new and interesting ways in the cyber domain by

leveraging "new media" and other means.

"New Media" and cyber power

"New Media" is more than the proliferation of social media outlets.[26] It includes the

widespread increasingly miniaturized and inexpensive mobile technology to include smart

phones and tablets. The social media landscape has been growing exponentially since the early

1990s. Sites like *Facebook* have evolved from servicing a specific university to a global mega-

corporation with over 1.6 billion users as of 2016.[27] In addition to massive growth the purpose of

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[24] Policy Planning Staff Memorandum 4 May 1948, Foreign Relations of the United States, 1945-1950, Emergence of the Intelligence Establishment, document 269, https://hisotry.state.gov/hisotricaldocuments/frus1945-50Intel.
[25] Benjamin Jensen, "The Cyber Character of Political Warfare," *Brown Journal of World Affairs* 24, no. 1 (2017): 161.
[26] "New" media is defined in this paper as the combination of social media platforms like Facebook and Twitter with the proliferation of mobile communication technology like cellphones and tablets.
[27] Beata Bialy, "Social Media – From Social Exchange to Battlefield," *The Cyber Defense Review* 2, no. 2 (Summer 2017): 71. http://www.jstor.org/stable/26267344.

these platforms has changed as well. Social media began as a networking tool to connect users and groups. Now, according to a study by the Pew Research Center, "62% of US adults are getting their news from social media…in 2012, this number was 49%."[28] The result is a much broader surface for groups to influence users, or to conduct attacks. Combined with mobile communications technology "[Social media] has been exploited to such an extent that it seems justifiable to call social media an information confrontation battlefield."[29] The other two factors to consider are the speed and breadth of dissemination of information, or disinformation.

Due to the massive amounts of data flowing across billions of platforms and devices the information can spread much farther than the intended target audience. Most social media users are members of more than one platform and have an average of several hundred "friends" or "followers." Besides the breadth the speed of information is unprecedented. Mobile devices allow users to record and edit photos, video, and text in real-time. As soon as information is disseminated it has the potential to reach several thousand users. The traditional media, newsprint and cable news, are thus rendered obsolete in their "news cycle" because the information has already spread globally by the time a local news outlet even picks up the story. All of these users and devices are connected via cyberspace, which adds another level of complexity and opportunity for those seeking to spread chaos and disinformation.

Dr. Jensen et al identify "[T]here are distinct strategic logics in cyberspace: disruption, espionage, and degradation."[30] These logics are used primarily indirectly to achieve strategic ends to further shape the environment. Disruptions are designed to probe and signal rather than

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[28] Bialy, "Social Media – From Social Exchange to Battlefield," 74.

[29] Ibid, 75; for more on information confrontation see A. N. Kiryushin, "Information confrontation: the problem of terminology insufficiency," *Center for the Analysis of Terrorist Threats,* http://www.catu.su/analytics/439-informacionnoe-protivoborstvo-problema-terminologicheskoj-nedostatochnosti.

[30] Jensen, et al, "Fancy Bears and Digital Trolls," 6.

coerce or compel an adversary. Examples include website defacements designed to influence audiences and to support the narrative. Espionage "concerns altering the balance of information to achieve a position of advantage."[31] This has long term implications as states, and non-state actors seek to gain advantage over each other by stealing information. Lastly, degradation is "designed to sabotage the enemy target's networks, operations, or systems…"[32] This can range from denial of services through physical destruction via malicious code such as Stuxnet. Dr. Valeriano et al identify cyber operations as a "[N]ew domain to weave a web of lies and half-truths designed to shape public opinion and signal resolve…through low-cost, deniable cyber actions to amplifying broader propaganda efforts…"[33] Russia has taken advantage of the emergent technologies and their inherent gaps to leverage influence over target audiences and achieve strategic advantage.

3. Russian Background

Historical Context

Russia has a history of defensive aggression fueled by a lingering perception that the West undervalues their position as a great power.[34] The current president, Vladimir Putin is trying to make Russia great again, but doesn't have the strong economy or military to do it. So, his actions, and the tactics of the Kremlin, can be likened to weighting the die. Thus, they are struggling mightily to re-gain perceived lost power by balancing in a creative new way. Current Russian political and informational methods echo to the Soviets' active measures and reflexive control during the Cold War. Christopher Chivvis' article "Hybrid war: Russian contemporary political warfare," clarifies this sentiment, and provides context for the difference between

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[31] Ibid, 7.
[32] Ibid, 7.
[33] Valeriano, *Cyber Strategy*, 199.
[34] Kotkin, "Russia's Perpetual Geopolitics," 2.

hybrid war and political warfare. Hybrid warfare has a key ingredient of military aims, and the

use of military force, but there is critical interplay with political warfare. The Russian model uses

political warfare as a pretext to military action, as well as means to accomplish foreign policy

objectives.[35] It is more than a hybridization of methods and means, rather the Russians have

developed and are improving a "new generation" warfare.

Gerasimov and "New Generation" Warfare

General Gerasimov developed a doctrine for taking advantage of all elements of national

power with a heavy focus on the informational. The so-called "Gerasimov Doctrine" is focused

on civil populations, persistent, and "economizes the use of kinetic force."[36] The Russian model

of "new generation" warfare, is similar to many military leader's take on the current global

security situation.[37] He notes, similar to U.S. military leadership, that:

> "mobile, mixed-type groups of forces, acting in a single intelligence-information
> space…has been strengthened…Tactical and operational pauses that the enemy could
> exploit are disappearing. New Information technologies have enabled significant
> reductions in the spatial, temporal, and informational gaps between forces and control
> organs."[38]

Gerasimov establishes a ratio of 4:1 for non-military measures being employed over military.[39]

He goes on to note, "The very 'rules of war' have changed. The role of nonmilitary means of

achieving political and strategic goals has grown, and in many cases, they have exceeded the

power of force of weapons in their effectiveness [see figure 1]." [40] The key distinction is that

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[35] Christopher S. Chivvis, "Hybrid War: Russian Contemporary Political Warfare," *Bulletin of the Atomic Scientists* 73, no. 5 (2017): 317, Ebscohost (124996707).

[36] Ibid, 317.

[37] Charles K. Bartles, "Getting Gerasimov Right," *Military Review* 96, no. 1 (2016): 30. Although there are multiple definitions "hybrid" warfare generally is seen to be the blending of "conventional and unconventional military forces with aspects of national power."

[38] Gerasimov, "The Value of Science," 24.

[39] Ibid, 28.

[40] Ibid, 24.

Russia considers the non-military (diplomatic, information, economic) as measures of war,

versus the West viewing non-military means as ways to avoid full scale conventional war.[41]

Figure 1: Change in the Character of Warfare
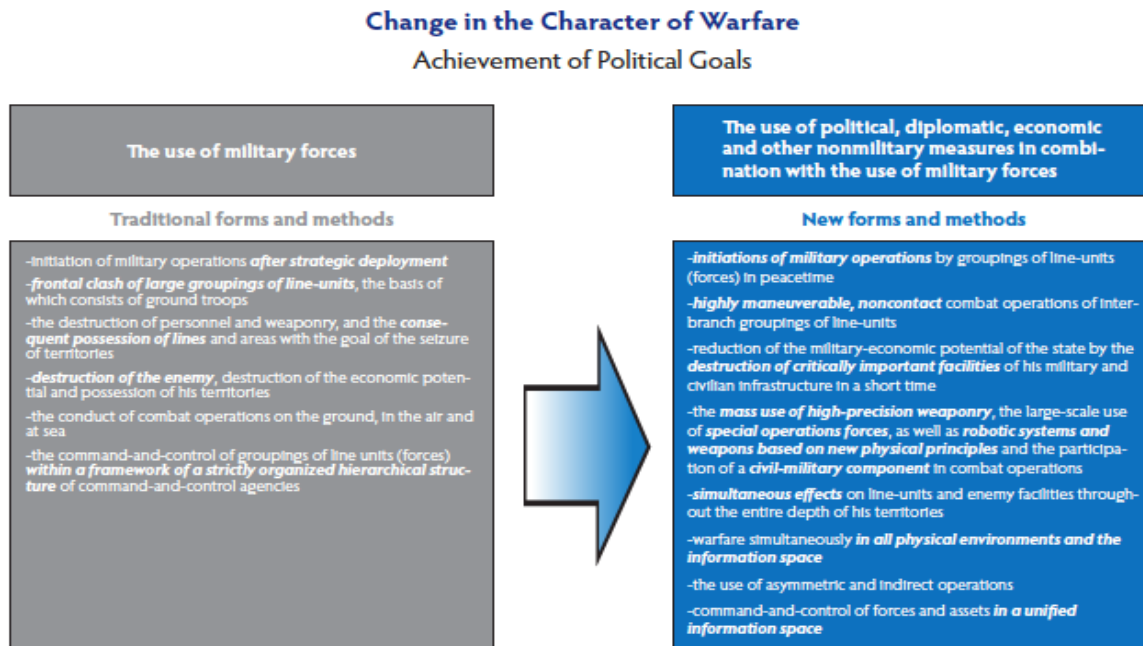
Source: Gerasimov article in *Voyenno-Promyshlennyy Kurier,* 26 February 2013, translated by Charles Bartles

In his article Gerasimov depicts a model for the "Role of Nonmilitary methods in the

Resolution of Interstate Conflicts."[42] The stages, or phases are listed out on the x-axis:

1. Covert origin
2. Strains
3. Initial Conflicting Actions
4. Crisis
5. Resolution
6. Reestablishment of peace (post conflict regulation)

Along the y-axis is the military threat scale from "potential military threat" to "military conflict"

(Figure 2).

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[41] Bartles, "Getting Gerasimov Right," 34.
[42] Gerasimov, "The Value of Science," 28.

It is key to note is the non-military measures used significantly outweigh the military. Even with the recent modernization of the Russian armed forces, they are bound by the nationally weak economy and must be used sparingly. Putin and the Kremlin know they cannot instigate actions i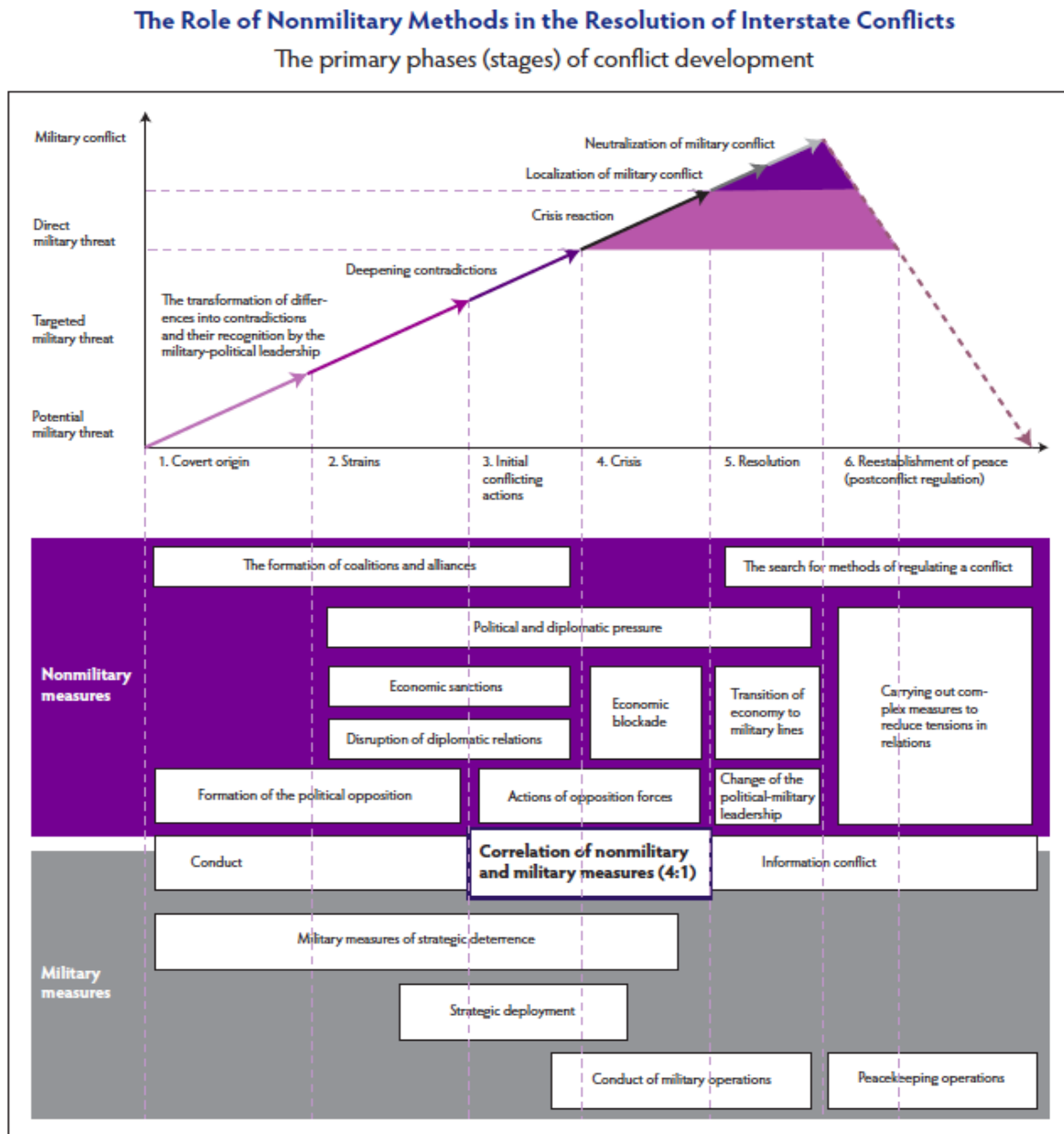n Eastern Europe that would commit the US, NATO, and partner nations and risk starting a global war. So, the IW/PW is combined to widen gaps/seams and the military forces only take action when they can fully exploit and consolidate advantageous gains.

It is illuminating that Gerasimov concludes by saying, "We must not copy foreign experience and chase after leading countries, but we must outstrip them and occupy leading positions ourselves."[43] Gerasimov's overtures are in line with his president, and both espouse a strategy with an end in mind to undermine liberal democratic ideals and re-assert Russia as a superpower. This is evident as "Russian view of modern warfare is based on the idea that the main battlespace is the mind and, as a result, new-generation wars are to be dominated by information and psychological warfare…"[44]

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[43] Ibid, 29.

[44] Janis Berzins, *Russia's New Generation Warfare in Ukraine: Implications for Latvian Defense Policy*, Policy Paper no. 2, Center for Security and Strategic Research National Defence Academy of Latvia (Riga, Latvia: Center for Security and Strategic Research, 2014): 5.

Figure 2: The Primary Phases of Conflict Development

The Role of Nonmilitary Methods in the Resolution of Interstate Conflicts
The primary phases (stages) of conflict development

Source: Gerasimov article in *Voyenno-Promyshlennyy Kurier,* 26 February 2013, translated by Charles Bartles

New Model

Russia has moved beyond the ideology of the Cold War, and taken full advantage of new technologies and social media to push their agenda of increasing power in the region to include the annexation of Crimea in 2014 where a blend of political warfare and "new media" created a

ruse to employ conventional military forces.[45] Russia has also been exerting influence in the

former Soviet states recently by, "encouraging the growth of political parties with strong pro-

Moscow sympathies, such as the Hungarian nationalist party, and the Harmony party in

Latvia."[46] These actions, which all involve "new media" spread of information and

disinformation to exert political influence are malicious forms of soft power. Most recently, and

closest to home, there is evidence of Russian influence during the U.S. presidential election in

2016. They used "new media" platforms to conduct political warfare as a way to avoid the direct

hard-balancing that could be seen in the nuclear arms race during the Cold War. The proposed

model to view the Russian blending of methods and means is in their famous nesting dolls,

matryoshka.

4. The *Matryoshka* Doll Model

The *matryoshka* doll, or matron doll, usually has five layers working outward from one

solid wooden doll at the center. Russia merges PW and IW with covert and overt military actions

to "[P]unch above its weight, largely by exploiting weaknesses…"[47] The central strength is the

political legalism to solidify its goals. Layering outward are overt military action, covert military

action, information warfare, and finally political warfare (Figure 3). Each layer obfuscates the

next and gives plausible deniability allowing Russia to maneuver to a position of advantage.

Further they manipulate information resulting in chaos and confusion and ultimately weakening

the response of entities like NATO.

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[45] Keir Giles, "Russia's 'New' Tools for Confronting the West: Continuity and Innovation in
Moscow's Exercise of Power," Chatam House, (March 21, 2016): 15-6,
https://www.chatamhouse.org/site/files/chatamhouse/publications/research/2016-03-21-russias-new-tools-giles.pdf.
[46] Chivvis, "Hybrid War," 318.
[47] Modern Warfare Institute at West Point, *Analyzing the Russian Way of War: Evidence from the 2008 Conflict with Georgia* (West Point, NY: Modern Warfare Institute, 2018), 6.

Figure 3: *Matryoshka* Model

The first two layers in Russian sharp power seek to drive wedges in existing gaps. To this end the first layer of political warfare seeks to use reflexive control and active measures to influence the target audiences and exploit existing divisions. When compared to Gerasimov's "primary phases (stages) of conflict development" the non-military measures include formation of the political opposition and disruption of diplomatic relations.[48] In the Russian periphery this includes taking advantage of Russian speaking population, nationalistic ties, and exploiting "color revolutions."

The second layer reinforces these with information warfare (IW). Russia employs all tools at their disposal to include traditional media, cyber-attacks, and third-party actions.

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[48] Gerasimov, "The Value of Science," 28.

Specifically, Russia utilizes cyber coercion to expand the gaps, generate deception (*maskirovka*), and reinforce the spread of disinformation. The Modern Warfare Institute at West Point report highlights the cyber actions, "The interwoven effects of cyber operations against Georgia, to include a constrained physical layer, a degraded logical layer, and a manipulated human layer, while not sufficient to win the war, did facilitate kinetic operations at a negligible cost to Russia."[49] The 2017 US National Security Strategy (NSS) expands on this, "Russia uses information operations as part of its offensive cyber efforts to influence public opinion across the globe. Its influence campaigns blend covert intelligence operations and false online personas with state-funded media, third-party intermediaries, and paid social media users or 'trolls.'"[50]

Layer three, "little green men," then can take advantage of the chaos by providing opportunities for local militias and securing key terrain or infrastructure. Russia further denies these covert actions and continues to enact PW and IW as locals conducting operations. Overt military actions augment the covert actions in layer four. Russia will not publicly execute overt military action lest a coalition take action or a conventional conflict be initiated. Russia employs logistics build-up on the border, electronic warfare (EW), deception measure ostensibly in preparation for the defense of "Russian" citizens.

Finally, once the physical goals are met in support of the informational and political strategies Russia can "intervene" in the political legalist sense. Often this is conducted through a referendum citing "commitment to defend…territorial integrity in accordance with the many international agreements…"[51] At this point it is too late for the international community to take decisive action. Russia has taken the initiative and consolidated their gains.

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[49] Modern Warfare Institute, *Analyzing the Russian Way of War*, 63.
[50] The White House, *The National Security Strategy of the United States of America* (Washington, DC, 2017), 35. https://www.whitehouse.gov/wp-content/uploads/2017/12/NSS-Final-12-18-2017-0905.pdf
[51] Berzins, *Russia's New Generation Warfare*, 3.

Analogies, however problematic or insufficient, are a common tool for communicating an unusual or nebulous concept. For instance, the first automobiles were aptly names "horseless carriages," and more recently the internet earned the moniker of the "information superhighway." Regardless of the efficacy, humans use analogies to create mental models of concepts that may be otherwise very difficult to describe. There is a concerted effort to describe and define the combination of information operations, cyber means, and "new" media. Recent operations by the Kremlin have perplexed the Western world in general, and the United States specifically, leading to imprecise analogies and terms being developed to describe their seemingly novel blending of ways and means.

The term "hybrid warfare" displays a misguided attempt to apply analogy to something perceived as new, but in reality, is the Russian combination of military with their longstanding doctrine in information warfare.[52] Charles Bartles, a Russian linguist and analyst at The Foreign Military Studies Office (FMSO) at Fort Leavenworth, explains the so-called "Gerasimov Doctrine," is really General Gerasimov, "simply explaining his view of the operational environment and the nature of future war, and not proposing a new Russian way of warfare or military doctrine."[53] Rather, Gerasimov's "new generation" warfare describes how Russia fully integrates all instruments of power to achieve a position of advantage. A better analogy is the *matryoshka*, as described above, which invokes a deep cultural view of these new operations and displays the multi-layered employment of means to achieve the Kremlin's strategic ends. This model will be applied to the Ukraine Crisis in 2014 by examining the goals, target audience, methods of messaging and results of the operation.

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[52] Giles, "Russia's 'New' Tools," 8-10.
[53] Bartles, "Getting Gerasimov Right," 31. Gerasimov Doctrine is generally defined as the combination of "conventional and unconventional military forces with aspects of national power."

The operations in Ukraine are informative to describe Russia's integration and combination of methods and means to achieve their goals. Ukraine reflects the logic that Russia can win with minimal force applied by offsetting with 4:1 non-military measures:military. The *matryoshka* model provides a visualization of the application of "Gerasimov Doctrine" and old Soviet reflexive control as means to apply "malicious" soft power and sharp power.

The Ukraine case study begins by observing Russia's goals. Next, the audiences, Russian populace, Ukraine government, and international community are analyzed. Following the discussion of goals and audiences the methods are examined utilizing the *matryoshka* model. Finally, the results are analyzed to determine the efficacy of the model and Russian employment.

5. Case Study (Ukraine 2014)

Goals

The goals of the Kremlin, and more specifically Vladimir Putin, are multi-leveled, and interwoven with Russia's broader history as a nation seeking regional and international power.[54] Similar to a mother bear protecting her cubs, Russia views itself as acting in defense of the greater Russian realm as it existed prior to the end of the Cold War. More specifically, in the 2014 Ukraine operation, there are three possibilities for broader strategic ends. Daniel Treisman, Professor of Political Science at the University of California, Los Angeles, sketches these through the lenses of Putin as the "defender," the "imperialist," and the "improviser."[55] These roles are not mutually exclusive and belay nuanced international and domestic motivations.

The first goal, based around Putin as the defender, was to prevent Ukraine from joining the European Union and the North Atlantic Treaty Organization (NATO), and secondarily to

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[54] Mankoff, "Russia's Latest Land Grab," 6; Fyodor Lukyanov, "Putin's Foreign Policy," *Foreign Affairs* 95, no. 3 (May, 2016): 30-31.
[55] Daniel Treisman, "Why Putin Took Crimea," *Foreign Affairs* (May, 2016): 47.

maintain the key port of Sevastopol for the Black Sea Fleet. Second, as the "imperialist," Putin

sought to repair the damaged stature of the Soviet Union by re-acquiring former territories.

Finally, events outside the Kremlin's control led to a more impulsive reaction to following the

collapse of former President Yanukovych's government and the establishment of the interim pro-

Western government.[56] However, Treisman notes the lack of efficacy for leaning too heavily on

the imperialist or revisionist model for motivations in Ukraine saying, "[I]t suggests that Putin

has become willing in recent years to take major strategic risks to counter seemingly limited and

manageable threats to Russian interests."[57] The supreme reason for the annexation of Crimea was

the "gambling mother bear" moving to protect a strategic naval base in Sevastopol.[58] There are

significant economic stakes as well given Russia's heavy reliance on oil and gas exports through

Ukraine and the Black Sea.[59] The specific goal in the Ukraine operations was to create a

narrative that maintained Russia's broader vision as a power player in the region and reduced

risk by staying just below the threshold for large scale military intervention by any Western

powers.

Audiences

The audience and means of messaging are where the stacking doll, *matryoshka*, method

can truly take form. By using a layered approach of political warfare (PW), Information Warfare

(IW), and military special operations the Kremlin conducted signaling for the global, regional,

and internal audiences. Each level of the *matryoshka*, nesting doll, was designed to present a

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[56] Treisman, 47.

[57] Treisman, 53.

[58] Treisman, 54; Emilio J. Iasiello, "Russia's Improved Information Operations: From Georgia to Crimea," *Parameters* (2017): 54; Berzins, *Russia's New Generation Warfare*, 3. Crimea is a key strategic node for the Russian Black Sea Fleet, providing a base for "the last 250 years." Losing this key military infrastructure would be devastating to Russia's mobility of their military as well as the security of their economic ventures.

[59] Jeffrey Gedmin, "Beyond Crimea: What Vladimir Putin Really Wants," *World Affairs* (July/August 2014): 10. Russia relies heavily on petroleum products as a major export that "accounts for seventy percent of Russia's annual exports, providing for more than half the Russian federal budget," and "three major pipelines run through Ukraine."

multilayered and customized message, each fitting into the larger theme, and preventing the audience from seeing clearly what was at the center. The strategic cyber intelligence analyst Emilio Iasiello noted the use of reflexive control to "influence internal, regional, and global audiences," where the message is specifically primed for a target audience based on a thorough assessment of that target.[60] Further, he says, "[T]he information space lends information resources, including 'weapons' and other informational means, to affect both internal and external audiences through tailored messaging, disinformation, and propaganda campaigns."[61]

Regionally, the target audience included, besides Ukraine, other former Soviet-bloc countries. In the other former Soviet-bloc countries, the messaging was less direct, albeit with significant importance. Through broad proliferation across cyber means the message is clear, and that is the mother bear will protect her "cubs."[62] Russia also used the "stories" covered by their media outlets to message the Russian populace and build nationalist support for the broader actions in Ukraine. Control of the population is a key factor to any authoritarian regime maintaining power and influence. Russian television and radio promulgated false narratives demonizing the EU and Ukrainian government.

Methods

First, the PW Russia conducted could be seen as the narrative aimed at the broader global audience. The messaging begins with cyber coercion, like Operation Armageddon in 2013, to set the conditions for "future crisis bargaining," and begin "isolating Kiev, and demonstrating the

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[60] Iasiello, "From Georgia to Crimea," 55. Reflexive control refers to the Soviet terminology to describe the systematic methods and means to control the adversary's decision making through deception and disinformation among others.
[61] Ibid, 51.
[62] Dmitri Trenin, "The Revival of the Russian Military," *Foreign Affairs* (May, 2016): 26; Giles, "Russia's 'New' Tools," 4.

futility of the Ukrainian state."[63] The second method is through the "firehose of falsehood," a term coined in a recent RAND Corporation study, characterized by high-volume and multichannel operations like RT (formerly Russia Today), where half-truths and full fabrications are blended to create a "mist of digital influence," according to Timothy Thomas.[64] Doctored images, Nazi symbols painted on Ukrainian tanks, were promulgated to further distance allies.[65] Meanwhile, Russia attempts to show the juxtaposition of the "illegal" actions of the EU and Ukrainian government with their legal actions, essentially reversing the roles of aggressor and victim.[66] The first layer isolates the closer regional audience.

In the second layer of *matryoshka,* the IW takes a larger role in targeting the regional audience, to include the specific country at risk. It is important to understand the two aspects of Russia's view of IW. There is the information-technical aspect, consisting of the "hardware and software that convert digital input into useful data" and the information-physiological, that includes "the effect that this data has on the subconscious and behavior of the population."[67] A good example of the combination of technical and psychological are the troll farms where Russian citizens are paid to post pro-Russian content on social media and news sites up to 126 times during their 12-hour shift.[68] Ukraine presented fertile ground for the poisonous seeds to be sewn, as evidenced by the fact that 89 percent of the population received their news primarily

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[63] Benjamin Jensen, Brandon Valeriano, and Ryan Maness, "Fancy Bears and Digital Trolls: Cyber Strategy with a Russian Twist," rev. (working paper, Journal of Strategic Studies, 2018), 8-9, 17.

[64] Christopher Paul and Miriam Matthews, The Russian 'Firehose of Falsehood' Propaganda Model: Why It Might Work and Options to Counter It (Santa Monica, CA: RAND Corporation, 2016): 2, https://www.rand.org/pubs/perspectives/PE198.html; Timothy Thomas, "Psycho Viruses and Reflexive Control: Russian Theories for Information-Psychological War," *Transitions Forum*, Legatum Institute (London: Legatum Institute, 2015): 16.

[65] Iasiello, "From Georgia to Crimea," 57.

[66] Berzins, *New Generation Warfare,* 3; Iasiello, "From Georgia to Crimea," 58.

[67] Thomas, "Psycho Viruses and Reflexive Control," 16.

[68] Iasiello, "From Georgia to Crimea," 56.

from television, and, according to a poll conducted by the Razumkov Center in 2011, half of the Ukrainians trusted the content, heavily reliant on rebroadcasting Russian TV content.[69]

The first two layers of the nesting doll model prepare the global, regional, and internal audiences through traditional and "new" media methods, combined with cyber espionage, to allow Russia to act militarily utilizing the third and fourth layers respectively. To this end Russia supported separatists and organized their special operations units into Rapid Reaction Forces. These units are highly trained, with exceptional discipline and achieved success with almost no bloodshed. When the time was right, Bartles and McDermott describe the Crimea campaign as, "[T]he first large-scale, well-executed *coup de main* since the collapse of the Soviet Union...[and the future] is likely to include the use of naval infantry and dedicated peacekeeping units (other RFF components) under the guise of peacekeeping operations."[70] Near the center of the misleading messaging *matryoshka* are the proverbial little green men, eagerly waiting to take advantage of the physical gains prepared by messaging through PW and IW. Finally, Russia supported a referendum, deemed by the international community as illegitimate, to annex Crimea.

Results

One major lesson that can be derived from the Crimea campaign is that Russia learned and adapted after their foray into Georgia in 2008. The Kremlin's actions in Georgia show a major landmark as "cyberattacks occurred concurrently with Russian military operations," and these actions were further refined and executed in Ukraine.[71] The results in 2014 were not as

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[69] Marina Psenti and Peter Pomeranstsev, "How to Stop Disinformation: Lessons from Ukraine for the Wider World," *Transitions Forum*, Legatum Institute (London: Legatum Institute, 2015): 5.

[70] Charles K. Bartles and Roger N. McDermott, "Russia's Military Operation in Crimea: Road-Testing Rapid Reaction Capabilities," *Problems of Post-Communism* 61, no. 6 (November/December 2014): 59.

[71] Bartles McDermott, 51.

apocalyptic as some of the initial reports would have one believe. Yes, Crimea was annexed, but in the broad strategic view Russia's actions potentially drove Ukraine, and others, closer to the EU and NATO.[72] The international community did not swallow the "firehose of falsehood" and sees Russia for what it is, the aggressor. Jeffrey Mankoff, Deputy Director of and a Fellow in the Russia and Eurasia Program at the Center for Strategic and International Studies, posits, "[T]hat Moscow's coercive diplomacy and support of separatist movements diminish Russian influence over time – that is, these actions achieve the exact opposite of what Russia hopes."[73] He further cites countries like Azerbaijan, Georgia, and Moldova working to distance themselves from reliance on Russia, in addition to the Baltic states joining the EU and NATO. In the long game the "gambling mother bear" is betting it all on black and small wins in the near term will give way to stiffer resistance. Ukraine has already begun a concerted counter-messaging campaign and they are sharing their lessons with the global community to prevent future Russian aggression through *matryoshka* campaigns.

Conclusion

There is a surplus of think tank reports, academic journal articles, and opinion pieces describing what to do about Russian "hybrid" warfare, or "sharp" power. It is best to bin these recommendations into categories of DIME. First, diplomatic measures must be taken to increase analysis and information sharing across NATO and the EU. One way to accomplish this is through the formation of the Global Engagement Center and increased intelligence and law enforcement collaboration internationally[74] which will send the message that "NATO, an alliance

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[72] Mankoff, "Russia's Latest Land Grab," 5; Iasiello, "From Georgia to Crimea," 58.
[73] Ibid, 5.
[74] Iasiello, "From Georgia to Crimea," 62-3. The Global Engagement Center was initiated by former US President Obama and its purpose was to "track foreign propaganda and disinformation efforts undermining US national

of democracies, is firmly embedded in a world-wide web of secure, mutually-reinforcing democracies anchored on the United States and which will act in their collective defence."[75] The informational recommendations are far reaching and could consume an entire document alone, but can be condensed into defensive and offensive measures. Defensively there needs to be protection against Russian *disinformatzya* through a common set of definitions for propaganda and a robust education effort of public audiences.[76] Offensively, "truth squads" and "counter-disinformation editors" must be enabled to counter the "firehose of falsehood" with a raging flame of truth and transparency to reach a broad audience by exposing the lies and fake news while building up stories of truth.[77] The military role of NATO is key to deter Russia and further demonstrate, through investment, that Russia will never outmatch the Alliance in funding and readiness.[78] Finally, economic investments must be made first to reduce the dependence on Russia for Europe's energy needs and bring the EU and US closer together through the Transatlantic Trade and Investment Partnership.[79] These are only a few concrete examples of recommendations that can counter and disrupt future attempts of the Russian *matryoshka* model.

The 2014 Russian operations in Ukraine were designed to create the conditions through cyber and information operations to utilize military force. Russia took Crimea and barring a complete collapse of the regime it will stay there. However, we should not allow fear of the "gambling mother bear" cause us to cease actions to better understand the *matryoshka* model, "hybrid" warfare, or any other form of "sharp" power. The global community is more connected

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security interests." This initiative needs to be reinvigorated in the face of Russian and other authoritarian sharp power moves in the information environment.
[75] Julian Lindley-French, *NATO: Countering Strategic Maskirovka*, Policy Paper, Canadian Defence & Foreign Affairs Institute (Calgary, Alberta: Canadian Defence & Foreign Affairs Institute, 2015): 5.
[76] Pomeranstsev and Weiss, "The Menace of Unreality," 40.
[77] Ibid, 41.
[78] Lindley-French, *NATO: Countering Strategic Maskirovka*, 5.
[79] Gedmin, "Beyond Crimea," 15.

than it has ever been and it is even more imperative for us to work together to ensure all peoples have access and education to discern false information from true.

The international stage is complex and fluid, continuously changing, but human nature and the selfish intentions to achieve power have not changed in millennia. States still attempt to gain leverage over one another and maintain their sovereignty by gaining relative power through balancing. Multiple forms of balancing can exist together, but in the current system soft-balancing is the status quo. Russia has latched on to a new paradigm of malicious soft-balancing by utilizing political warfare and savvy exploitation of "new media." The liberal world order could begin to crumble if the bear is allowed to continue to tell his story in this corrosive way. To avoid this, the U.S. should not try to meet the threat of Russian political warfare head-on. Instead, a long-term view should be taken to find gaps and seams to degrade Russian deception while upholding the ideals of liberal democracy.

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