Multi-level influence for engagement
and resilience

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Preface

Despite its apparent common sense meaning, influence is a difficult concept to pin down. Influence may appear straightforward: the power to cause an effect, or practice of doing so. However, influence is complex. It occurs at various scales, individual to international. It includes multiple actions and actors. The relationships between causes and effects can be tenuous, and challenging if not impossible to determine.

Influence can therefore be tough to either understand or undertake. This report seeks to provide clarity, rigor and sophistication to understanding influence conceptually and in practice. In doing so, it addresses these questions:

What is influence? How does it work? What makes some people, groups, and institutions influential? What leads to some messages being more, or less, influential? How can influence efforts be better planned, implemented, and evaluated?

The answers will be of interest for influence practitioners, such as those working in public affairs, public diplomacy, and international engagement, as well as those engaged with addressing concerns arising from malign and coercive influence activities, such as disinformation and foreign interference campaigns.

The report emphasises that influence occurs at multiple, inter-related, levels. At the micro-level, the conclusions of the report draw on the fields of social psychology; at the meso level, on sociology; and at the macro level, on international relations. The report does not presume advanced training or knowledge in these fields.

Influence efforts typically target audiences, individually or in groups, sometimes referred to as publics, up to the level of entire populations. This report underlines that these target audiences are active interpreters of influence messages, not passive recipients.

Central to our analysis is the need to appreciate the ways that target audiences are diverse, complex, and dynamic. Understanding target audiences, and their contexts, is an essential element of planning for influence activities (or seeking to increase resilience to malign influence).

This report will assist those engaged in target audience analysis by providing a conceptual framework upon which such analysis is undertaken, and consequent planning decisions are made. The aim is to promote best practice in target audience analysis, and to stress its importance.

In part this emphasis arises out of a concern that target audience analysis is not given sufficient weight in the planning of influence activities, which often focus on the technical elements (such as the use of social media platforms, bots, deep fakes, and artificial intelligence) and the content of messages (the images and narratives).

The effectiveness of such technologies and content is made more likely if they are supported by adequate research on, and understanding of, the target audience.

Assessing effects is the topic of a companion report, titled Influence Indicators. The companion report addresses measures of performance, impact, and effect in ways that aim to be usefully applied to the evaluation of influence activities.

Executive Summary

To better comprehend how influence operates, this report undertakes a review of applicable social, psychological, and political science concepts, theories, and models. In doing so the report highlights key insights into how Australia and its partners can further enhance national sovereignty and address attempts at malign foreign interference.

The report details concepts of influence, exploring its forms, characteristics, and dynamics across three levels: micro (grounded in social psychology), meso (sociology) and macro (international relations). A companion report addresses the identification and measurement of influence indicators. Both reports consider factors that are significant for the development of capabilities with the means to mitigate foreign interference, to promote national values and defend national interests, and enhance international engagement and partnerships.

The report outlines factors that are significant for the development of capabilities with the means to mitigate foreign interference, to promote national values and defend national interest, and enhance international engagement and partnerships.

By exploring the dimensions and dynamics of influence, this report will aid in the identification of

- factors that make an actor influential;
- reasons why some groups become a target;
- conditions that increase the potential for resilience to influence attempts; and
- likely responses by targets if new beliefs or orientations are adopted.

Implications of Influence at the Micro Level of Analysis

Appreciating the human need for mastery
People all have a fundamental need for mastery, that is, the capacity to understand, make sense of, and predict their environment.

Individual differences in need for mastery
The mechanics of influence vary based on differences in *how* people think. Those who enjoy more effortful cognitive activities are more motivated to deeply engage with messages. People who adopt more intuitive "gut-feel" modes of cognition are more influenced by heuristics.

Affordances of the medium shape influence
The mechanics of influence vary based on the affordances of the medium, situation or context. Contexts that offer the opportunity for deep engagement tend to be associated with central processing and need high-quality arguments to be successful. Contexts that do not require time or effortful processing are associated with peripheral processing, where heuristics are more influential than deep argumentation.

Appreciating the human need for relatedness
People have a fundamental need to belong, to have and maintain relationships with other people and groups. This is often expressed via commitment to groups, that is, social identification. In some situations, group memberships are the lens through which people perceive the world and their interactions in it and are more important to understanding collective behaviour than personality or idiosyncratic attributes.

Influence as an intragroup phenomenon
People with whom we share a social identity are seen as more important and valid sources of influence than outgroup members.

Persuasive influence is shaped by norms
Social identities are linked to group norms – informal rules that shape emotions, cognitions, and beliefs of group members. Group norms explain why group members act in ways that are similar to each other but different to members of other groups. Such norms affect who is deemed to have authority (or not) and help to determine how information is processed within the group.

Appreciating the human need for autonomy
People have a fundamental need to feel that their individual and group interactions, and decisions, are self-directed and freely chosen.

Legitimate authority and coercive power
People will accept and enact the vision of an authority when that authority fosters a shared sense of identity between themselves and the group. Coercive tactics conversely may prompt disagreement with and highlight difference from an authority, promoting private rejection even if it elicits public conformity.

Higher-order values as a path to shared identity
An effective way of exerting influence is to craft a higher-order social identity between two groups. These should still incorporate meaningful recognition of the strengths and unique attributes of the sub-groups.

Authority based leadership through identity entrepreneurship
Authority-based influence will be more effective where that authority is seen to represent the unique qualities of the group, and actively seeks to benefit the lives of group members.

Grassroots influence
Influence not only functions top-down. It also flows horizontally between group members through discussion and debate. Such interactions provide the basis for the formation of new groups, challenges to the status quo, and the introduction of new states of affairs.

Executive Summary

Implications of Influence at the Meso Level of Analysis

Orientations of the public
Publics critically interpret influence attempts in the context of their orientations to contemporary social life, resulting in either a multiplier effect or resistance to the message.

Social conflict and societal integration
Many forms of social conflict can help societal integration. Attempts to widely supress these can paradoxically create disorder.

Avoiding unintended consequences of influence
Disinformation campaigns need to be assessed considering cumulative consequences on established belief systems rather than only assessing narrow and immediate persuasion effects.

Protecting institutions for debate
Societal resistance to malign influence is enhanced by supporting and protecting the institutions and public spheres in which rational and respectful debate is undertaken.

The value of civil society groups
Civil society groups exert positive influence, including by making messages meaningful to diverse audiences, and are therefore valuable for societal resilience.

Fostering positive interactions
Encouraging meaningful interactions and exposure to diverse social identities in an environment of trust discourages political extremism.

Popular culture
Popular culture is an important source of soft power, though one that is also open to being weaponised.

Impacts of disaster and social crisis
Malign foreign interference can be most destructive during times of disaster and societal crisis. The effect of responses to such events and periods are less predictable than under normal circumstances.

Youth as targets of influence
Whole of government and whole of nations approaches to national security need to address factors that make young people a significant influence target.

Implications of Influence at the Macro Level of Analysis

Influence as a spectrum
Influence efforts between nations exist across the spectrum from cooperation to conflict. They include benign, ordinary, normative and even beneficial activities. They include covert and non-attributable efforts to deceive and coerce and to otherwise seek advantage outside of international norms. They include forms of coercive diplomacy, which seeks outcomes through threats, and actions short of conflict such as sanctions and embargoes.

Characteristics of the public
A nation's influence is subject to the interpretations and responses of others, referred to as audiences or publics. These publics include partners, neutrals, and competitors; they include individuals, groups, societies, nations, and international assemblages.

Pre-existing and persistent factors
The most persuasive factors in shaping the impact of influence efforts are pre-existing and persistent values, interests, beliefs, internal power structures, and external relationships. These factors determine how much attention influence efforts are given in the first instance, and how such efforts are interpreted and acted upon.

Characteristics and capabilities of the nation
A nation's influence is partly a product of its characteristics and its capabilities. Characteristics refers to tangibles such as geography, and demographics, as well as less measurable features such as reputation, status, identity and strategic narratives. Capabilities refers to dimensions of national power including diplomatic, informational, military and economic (commonly referred to as DIME). Therefore, influence involves whole of government and whole of nation approaches.

Relational influence
A nation's influence is relational, in that it varies depending on the nature of its relationship with those it seeks to influence. Relationships are:

- Embedded in complex networks of multiple connections;
- Asymmetric and complicated, varying according to issue and context;
- Dynamic, although some are more stable than others.

Immediacy of influence efforts
Influence efforts effects range from the direct and immediate, through the adjacent and persistent, to long term and wide-reaching (also known as first, second and third order effects). Target audiences and tactical objectives cannot be the only considerations when planning and evaluating influence activities.

Resistance and responses to influence
A nation's capacity to resist, counter, and otherwise respond to influence is a product of its internal characteristics and capabilities. These include public trust in democratic institutions and norms, the strength of civil society, levels of social cohesion, and the health of the information environment (see also meso section).

Recommendations that arise from the conclusions of the report are discussed in a concluding section. These include:

1. the need for enhanced target audience analysis when planning or analysing influence activities
2. the need for multi-level analysis including an accounting for intervening variables
3. the need to promote resilience of social structures, including institutions, civil society, and public trust
4. the need to look beyond analysis of Great Power influence activities and recognise the distinctiveness of various national and cultural contexts
5. the need to understand influence as operating at multiple dimensions and cumulatively over time

In addition to these main sections, three appendices provide further analysis of (A) the forms of grey zone operations, (B) the development of influence techniques in new techno-social systems, including online social networks, and (C) the role of data marketing techniques in audience analysis and online persona creation as aspects of social media influence campaigns. A final appendix discusses some definitions and uses of key terms: influence and interference; grey zone and hybrid warfare; and strategic communication/s.

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Introduction

Rising concerns about geostrategic competition and coercive forms of statecraft have led to greater attention to concepts of influence. While emergent interest in influence is evident in policy, research and commentary, the term is frequently deployed in ways that lack a clear comprehension of how meaning-making and behavioural effects are shaped by interpretation processes, audience factors, and social contexts.

To better comprehend how influence operates, this report undertakes a review of applicable social, psychological and political science concepts, theories, and models. In doing so the report highlights key insights into how Australia and its partners can further address attempts at malign foreign interference and enhance national sovereignty through engagement and partnerships.

The report details concepts of influence, exploring its forms, characteristics, and dynamics across three levels: micro, meso and macro. A companion report addresses the identification and measurement of influence indicators. Both reports consider factors that are significant for the development of capabilities with the means to mitigate foreign interference, to promote national values and defend national interest, and enhance international engagement and partnerships.

By exploring the dimensions and dynamics of influence, this report will aid in the identification of

- factors that make an actor influential;
- reasons why some groups become a target;
- conditions that increase the capacity for resilience to influence attempts; and
- likely responses by targets if new beliefs or orientations are adopted.

The current security challenges arising out of influence activities directly relate to attitudinal and behavioural factors within mainstream society as well as among groups traditionally understood as being marginalised. Online communication and social media receive a great deal of attention and remain critical vehicles of influence and change but it is notable that social interactions, associations, and attachments typically combine online and offline elements. This report therefore includes interpersonal and mediated interactions, social structures, and identifications that have a bearing on the impacts of influence efforts.

Influence and coercive statecraft

Over the last decade there has been an increase in malign statecraft activity and a qualitative shift in the ways that actors advance their strategic interests. Most notable is the rise in tactics which seek to attain a strategic advantage through disrupting and reorientating the attitudes and behaviour of populations.

The concept of the grey zone (and the associated term, hybrid warfare) is examined in greater length in the Appendices (see Appendix A and the Discussion of key terms). For the sake of clarity, the report here offers a definition derived from Hicks and Friend (2019, p.4) that grey zone tactics are "beyond those associated with routine statecraft and below means associated with direct military conflict between rivals".

Grey zone aggression is evident in how coercive statecraft is actively practiced through activities such as promoting disinformation to encourage societal disorder, information campaigns to interfere in elections, espionage, the use of trade sanctions to influence political positions, and symbolic threats through military or state sponsored paramilitary incursions into sovereign territory.

Central to this form of coercive statecraft is a consideration of how audiences, and the people that comprise them, will interpret and respond to such activities. Specifically, grey zone tactics are designed to fall short of causing a national by nation-states with military force reaction. Grey zone aggression is typically designed to have a high level of ambiguity regarding intent and/or attribution of responsibility.

A major concern of grey zone activities is the impact on the confidence that populations have in the norms, institutions and conventions that contribute to social and political stability. Also, in democratic nations military responses to foreign aggression require a base level of public legitimation. Civil society[1] and the public sphere[2] are therefore central to comprehending grey zone tactics and impacts.

Benign and malign influence in the grey zone

As is apparent in numerous related government reports, think tank research papers and defence doctrine publications, the term "influence" has numerous meanings and uses. For the purposes of this report, influence is associated with efforts to affect the thoughts (cognition), feelings (emotions) and/or behaviour (social actions) in ways where the intended outcomes are relevant to strategic competition. Further detail on how influence has been defined and how it relates to terms such as interference, engagement, persuasion, coercion, propaganda, strategic communication, public diplomacy can be found in the Discussion of select key terms (Appendix D).

In this report, influence includes benign and malign types. Influence is benign when it denotes a routine aspect of international, social and interpersonal relations, typically that being conducted openly and within accepted rules and norms. This form of influence inevitably includes competition and contestation, such as when vying for attention, prestige,

[1]Civil society refers to the networks of communities and groups that exist between the individual/family and the state.
[2]The public sphere refers to the areas within social life and civil society where people discuss political and societal matters.

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markets, and customers. It may involve advocacy, by nations, groups, individuals, organisations or coalitions, for changes in policy or practice.

Malign influence, no matter who undertakes it or for what goal, will seek to interfere in domestic political processes and/or disrupt the existing social or political order. Malign influence is also more likely to be covert or disguised, less likely to give importance to honesty or fairness, and – by definition – be malicious.

Benign influence further differs from malign influence in that the former demonstrates a greater respect for national sovereignty and operates in ways that are consistent with the international rules-based order. In practice, though, benign and malign influence can appear in combination as part of ongoing geopolitical manoeuvring.

Scales of influence: micro, meso, macro

The three main sections of this report outline how influence operates at levels from micro through meso to macro.

At the micro (individual) level, the concept of influence is grounded in the role of the human perceiver – that is, how aspects of people's cognition (biases, heuristics) and emotions, as well as identities and group memberships shape openness, or resistance to, influence.

At the meso (group) level, the report continues to consider how social identity factors and social influence processes relate to either an openness or resilience to malign forms of influence, as the focus turns to group structure, networks, culture, norms, interactions, power and conflict dynamics.

At the macro (inter/national) level, the report focuses on the geopolitics and geo-economics of strategic competition in addition to softer approaches to influencing states which include the role of international institutions, diplomacy, and other forms of strategic cooperation.

The three levels of analysis are explained in depth in their respective sections of the report. While they are presented separately, these different dimensions of influence are inter-related. Analysis of influence requires therefore recognition of its multidimensional nature, involving individuals, groups, societies and nations, and the interactions between micro, meso and macro levels.

The need for multi-level analysis is the case whether the analysis in question concerns influence actors, actions, or effects. Influence effects can occur at multiple levels, and inter-relations between levels can in turn result in effects that are ongoing or aggregated.

Moreover, inter-relations between influence effects may be more than the sum of their parts and may develop over time into unforeseen and more widely ranging outcomes, typically referred to as second and third order effects depending on how long-term and widespread they are. Approaches to the empirical analyses at, and between, these various levels are outlined in the companion Influence Indicators report.

Micro, meso and macro levels of analysis share an emphasis on the active nature of the actors involved in, and targeted by, influence efforts. Whether concerning individuals, groups, societies, institutions, or nations, understanding how influence operates is predicated on an understanding of those at whom influence efforts are directed -- in other words, this speaks to the need for sophisticated and contextualised target audience analysis.

Influence and audiences / publics / networks

Understanding target audiences is a foundational prerequisite for influence efforts. This includes insights related to cross-cultural awareness, communications campaign planning, creative and targeted messaging, and evaluation of campaign processes, activities, and outcomes. These types of activities have developed over a long history, based in part on the types of communications technologies and practices that have been intrinsic to their operation. A brief outline of these developments is included in Appendix B.

Audiences can refer to individuals, groups, societies, nations, and international assemblages. At macro and meso levels, at the level of the nation state, or groups within the nation state, audiences are often referred to as publics. This is to denote the connection between (1) the many private lives and interests, individually and collectively, of citizens and (2) the formation of political power and the development of public policy that occurs in the (idealised) realm of the public sphere, a space for debate and discussion and the public opinion.

Conceptions of audiences /publics vary; many are underdeveloped in ways that diminish their utility. Szostek (2020) for example outlines some problematic assumptions about influence that arise out of the use of the language and concepts of information warfare. First, that information can be targeted like a weapon to achieve a predictable result. Second, that audiences engage with an adversaries' influence efforts because they are vulnerable. Third, that 'winning' requires having a target audience believe and respond to certain information. While not irrelevant, these assumptions are insufficient, and if uncritically adopted may be deleterious.

Further problematic conceptualisations of audiences /publics arise when they are considered to be homogenous units: a 'mass'. Audiences and publics are more productively understood as being comprised of multiple individuals, groupings and segmentations – an uneven, distributed and dynamic network – and as being part of larger networks. Where audiences / publics

are considered for example at the level of the nation, it is prudent to consider both international relations and domestic politics.

This is of paramount importance for understanding influence conceptually and operationally. Influence operations typically operate internationally (by definition, foreign interference campaigns are conducted by foreign actors). They also engage transnational actors (media networks, content creators, social media platforms, the internet). They target domestic constituencies and audiences - the groups, communities and networks that form societies, shape public debate, and influence politics in various ways (formally and informally, properly and surreptitiously). They do so in order to impact policy decisions at a national level. This connects the macro and micro scales of influence with meso scales.

Taking a networked approach, nations are understood as constituting various elements and groups, themselves comprised of smaller elements, in an unevenly distributed and dynamic network. International relations is understood as similarly operating in a network including national, sub-national, international and transnational actors and groups. In this view, the nation acts as a node in a larger network, while simultaneously acting as a network comprised of multiple nodes and relationships.

A 'networked publics' approach to planning and/or analysis of influence operations broadens the range of actors and actions to consider, and increasing and complicating the pathways through which influence can occur. Analysis of influence at a macro level is contingent on the meso levels that constitute the macro, and the micro levels that constitute the meso. This highlights the need for identification and analysis of the groups and networks that shape how nations are influenced, including especially the identification of priority meso and micro level actors and actions – the 'actors and factors that matter'. This need and attempts to address it are discussed further in the companion Influence Indicators report.

Active audiences and the limits of influence

Typically, the most persuasive factors impacting the effectiveness of influence efforts are pre-existing and persistent values, interests, beliefs, internal power structures, and external relationships. These factors determine how much attention influence efforts are given in the first instance, and how such efforts are interpreted and acted upon. A fundamental assumption of influence campaigns in general (and which applies to international influence) is that most attempts to influence will usually be, at most, only marginally effective. One of the central premises of this report is that influence is 'co-created' by both the influencer and the target audience / public. Botan (2021, p.11) goes further to argue that the audience/public is usually the most significant contributor to its own influence, by a significant amount: the influencer "is about 1/10 to 1/8 as strong" as the audience / public.

Two main reasons account for the limitations of influence campaigns. The first is that there is no shortage of information in contemporary media environments – publics are constantly subject to multiple influence campaigns -- and there are limits on how much attention can be paid. Audiences determine therefore in the first instance what content they will pay attention to; most messages will be ignored, dismissed or paid scant attention.

For influence campaigns, once the first objective, attention, has been achieved, the second and more difficult task is to have one's message interpreted in ways that are favourable to the campaign objectives. In Botan's (2021, p.11) terms, a message has to first be "accepted for interpretation" and then that message will be subject to "new meanings co-created by publics".

Therefore, the likelihood of influence efforts being successful is contingent on the target audience's interpretation of the messages. The likelihood of a favourable interpretation will increase where interests and identities align, or when – as Reich and Lebow (2014, p.35) argue, target nations are persuaded that such alignment exists, where "it is in their interest to do what you want them to do".

The importance of understanding the audience applies at micro, meso and macro levels, and to the inter-relationships between these levels. These factors determine how much attention influence efforts are given in the first instance, and how such efforts are interpreted and acted upon.

This has consequences for research, including for Target Audience Analysis undertaken and the planning, implementation, monitoring and evaluation of influence operations, and counter-influence programs. Appendix C provides an example of how these basic requirements are undertaken in the planning of social media influence campaigns.

The three main sections outline fundamental principles leading to deeper understanding of these target audiences at the micro, meso and macro levels.

Micro

At the micro level, grey zone influence is predicated on the observation that influence involves people. It follows that insights from the science of human thought and behaviour (psychology) and the sub-discipline that relates to how thought and behaviours are influenced by the real, implied or imagined presence of others (i.e., social psychology) may offer pertinent insights into the processes through which interactions between people shape thoughts, feelings and behaviours to ultimately effect or stymie influence (Turner, 1991).

Situational awareness and social influence: what type of influence?

Although grey zone or malign influence is often discussed as a single phenomena, the psychological literature highlights subtle differences in the nature and goals of influence, the form of influence, as well as its effects on the target. Delineating these is key to an initial assessment of influence and grey zone situational awareness. Table 1 provides an overview of the different forms of social influence. It can be seen that influence differs based on its goals (shape an initial response; reinforce a response; change a response; Miller, 2013), targets (can target thoughts, feelings or behaviours), the form of influence (informational or normative; Turner, 1991) as well as its effects on the audience (from private, internalised acceptance to public superficial conformity; Kelman, 1958).

It is clear from the above that influence is multifaceted. Its effects are shaped by aspects of the audience (or perceiver), the characteristics of the influencing agent, as well as the broader context in which at an influence attempt is delivered and interpreted. To understand influence at the micro level, we look to how influence is conveyed: from a source to an audience, characteristics of the audience, as well as the interaction between the two. Figure 1 provides a summary overview of the key principles of this section.

Table 1. Overview of different goals, targets, forms and effects of social influence.

Goals of Influence	Definition
Shape an initial response	Occurs when people have no prior knowledge of the topic; do not have an existing pattern of responses relating to the topic.
Reinforce a response	Aims to strengthen already held convictions and patterns of behaviour.
Change a response	Seeks to alter already established patterns of behaviour.
Targets of Influence	**Definition**
Cognitions	Influence that attempts to target people’s thoughts or attitudes.
Emotions	Influence that attempts to target people’s emotional responses.
Behaviours	Influence that attempts to directly shape people’s behaviours.
Form of Influence	**Definition**
Informational influence	Influence attempts that seek to provide evidence of reality “how things are”.
Normative influence	Influence attempts that seek to provide evidence of the opinions, beliefs or expectations of others.
Effect on the Audience	**Definition**
Private “true” acceptance	Occurs when people internalise (take on) and accept the desired response, and enact it privately.
Public conformity	Occurs when people publicly appear to hold particular attitude or behavioural stance but privately believe something different.

Social influence is shaped by basic psychological needs

Figure 1 shows that central to understanding influence is to appreciate how it interacts with basic psychological processes and needs. There is broad agreement within the psychological sciences that people are driven by three fundamental basic needs: the need to have mastery or control over one's environment, the need to belong, and the need to be autonomous (see also Deci & Ryan, 2000). Table 2 provides an overview summary of the needs and their application to the grey zone context. Each of the needs locates and discusses the psychological processes of influence through a different lens. Specifically, the need for mastery reflects a need to form accurate opinions about ourselves and the world around us. This need is primarily related to how aspects of cognition (i.e., people's internal thought processes) shape how people seek out, and respond to, information in the world around us. The need for mastery treats influence as a primarily cognitive phenomenon (in the minds of the individual person or audience member). Yet, influence is not purely informational in character. Its effects are shaped by and also shapers of our sense of how we fit into the world; who "I am" and who "we are" (i.e., identity) and who "we" stand with and against. The fundamentally social aspect to influence is therefore reflected in the need to belong, whereby group memberships and identities determine who will be listened to or dismissed, how information is processed within and between groups. Finally, influence in the grey zone is about a contest for power and power often constrains free will. Our analysis of the need for autonomy reflects how influence attempts may be seen to impede the need to act with self-determination, with implications for how deeply internalised any resultant attitudinal or behaviour change may be.

In the sections that follow we expand upon the basic arguments anticipated above and reflected in Figure 1. The overriding proposition is that people will be motivated to pursue goals and relationships that allow them to fulfill the basic need for mastery, belonging and autonomy (see also Cialdini & Goldstein, 2004). As such, these needs relate to both the processes that make people susceptible to influence (i.e., speaking to our nature as fundamentally social beings), as well as helping to explain why we want to influence others (i.e. to change the thoughts, perceptions, attitudes, perceived norms, and behaviours of others). We adopt the basic needs as a framework to organise the current and most credible evidence on this topic from the psychological sciences.

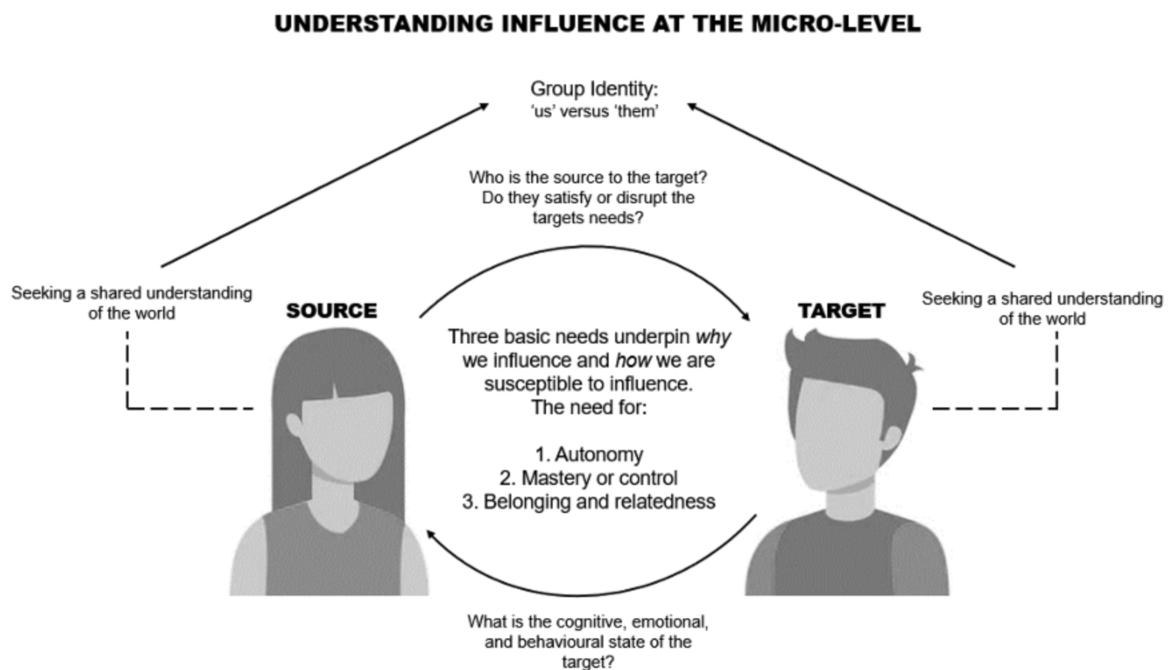

Figure 1. Overview of influence concepts and principles at the micro level.

Micro

Table 2. Overview of basic needs, definitions and relevance to grey zone influence.

Basic need	Definition	Relevance to grey zone influence
Need for mastery	Subjective feelings of competence and control within one's environment. Reflects a need to form accurate opinions about ourselves and the world around us.	This need shapes the functional effects of informational influence – people are susceptible to informational influence (and seek to influence others, in turn) because it aids the mastery need.
Need for belonging and relatedness	People have a need to feel connected to others and to be part of groups which give them positive self-value (self-worth).	This need shapes the fundamental effects of normative influence – people are susceptible to normative influence (i.e., care what valued others think and expect) because they want to maintain their valued relationships and commitment to groups.
Need for autonomy	People have a need to feel like a causal agent with respect to their own actions.	Influence attempts which appear to be coercive or constraining of an individual's (or group's) free will, may produce reactance and be counterproductive. "True" (private) internalised attitude change is fostered where the influence is experienced autonomously.

Social influence is shaped by the need for mastery

People have a fundamental need for mastery – that is, the need for a subjective feeling of competence and control within their environment (Table 2). The need for mastery reflects a need to form accurate opinions about ourselves and the world around us. This universal need for mastery can also differ in intensity between people (i.e. it is shaped by an individual differences component) and is achieved differently in different situations (i.e. there is a contextual component). These factors mean that the way that we achieve mastery may differ between people and across different situations, as outlined below.

People all have a fundamental need for mastery, that is, the capacity to understand, make sense of, and predict their environment.

People can differ in the degree to which they need/seek mastery

Although all people are motivated by a need to organise and understand the world around them in a way that generates meaning, people can differ in the degree to which they are motivated to access and process information. One of the most extensively researched ways that this has been conceptualised in the literature on persuasion is as an individual difference in need for cognition. Need for cognition captures the extent to which people are inherently interested in and enjoy effortful cognitive activities (e.g., Cacioppo et al., 1996). People high in need for cognition have a greater tendency to gravitate towards in-depth argument and reflection to make sense of the people and world around them (akin to what Pennycook et al., 2015, refer to as analytic thinking). On the other hand, people who are relatively lower in need for cognition are more likely to rely on others as well as cognitive heuristics (rules of thumb or short-cuts) to achieve this need (akin to intuitive thinking; Pennycook et al., 2015).

Need for cognition and thinking styles (i.e., a general tendency to use more analytic modes of reasoning) may shape the goals, type and effects of influence outlined in Table 1. For instance, people higher in need for cognition may be more attentive to and influenced by (well-constructed) informational influence, while people lower in need for cognition may be more susceptible to normative influence (as a heuristic; see Table 1).

The tendency to enjoy effortful cognitive tasks also shapes the degree to which people internalise and accept the message in a way that is deep and enduring. There is some evidence that the attitudinal change that occurs for people higher in need for cognition endures over time (Haugtvedt & Petty, 1992). The same study also reported that, when a counter message was presented after the initial persuasive message, people high in need for cognition displayed attitude resistance, while people low in need for cognition accepted the counter message and reverted to their initial attitude (Haugtvedt & Petty, 1992). There is some evidence that mood affects whether or not people are motivated to engage deeply with messages: people in a positive mood process messages in a way that will lead them to maintain that positive mood (i.e., they will process deeply if the message is positive but superficially if the message is seen as negative or threatening; see Hullett, 2005).

The mechanics of influence can differ for people based on differences in how they think. People who inherently enjoy more effortful cognitive activities and routinely adopt more analytic modes of thinking will be more motivated to deeply engage with messages while people who adopt more intuitive "gut-feel" modes of cognition will be more influenced by heuristics.

Well-designed influence strategies should consider that some people will process the information deeply and systematically (high effort), while others will process the message relatively quickly and superficially (low effort).

Deep versus superficial processing: fulfilling the need for mastery under different conditions
What is the mode or medium of the influence attempt? How much time will the audience member have to engage with the message? There are some situations and contexts that lend themselves better to achieving mastery goals than others. The most prominent and extensively researched model of persuasion is the elaboration likelihood model of persuasion (Petty & Cacioppo, 1986). The elaboration likelihood model suggests that, influence/persuasive attempts are shaped by time and opportunity to engage with the message. The insights of this model suggest that the affordances of the influence setting or context are likely to shape the form of processing that takes place and, in turn, how mastery needs are satisfied.

When a person has time and capacity to process a message deeply, this is associated with a central processing route. Central route processing involves high effort and thoughtful consideration of the message presented, as well as its relation to existing knowledge. Effective cognitive or behavioural influence via the central route is dependent on the quality of the information presented, and the influence itself tends to be more enduring (i.e., more deeply internalized per Table 1; see Petty & Cacioppo, 1986).

On the other hand, where a person does not have the motivation or time to process an influence message deeply, then peripheral processing occurs. The peripheral processing route is reliant on cues and heuristics present within or relating to the message (i.e., repetition, attractiveness of the source, norms; Petty & Cacioppo, 1986). When engaging in peripheral processing, people do not attend to the substantive argument of the message but instead rely on accessible cues from the message to form a judgement.

Influence works differently in different situations or media. Conditions that offer the opportunity for deep engagement (e.g., conversations) will tend to be associated with central processing and will therefore need to present high-quality arguments to be successful. Conditions that do not provide people time or opportunity for effortful processing (e.g., online media campaign) will be associated with peripheral processing, in which case heuristic cues will be more influential than presenting deep argumentation.

Heuristics and peripheral cues are therefore key to many influence campaigns (including online campaigns) although the online environment may well have a balance or both central and peripheral processing (SanJosé-Cabezudo et al., 2009).

Table 3 provides an overview of eight common types of heuristics relevant to peripheral processing and their application to grey zone influence (adapted from the work of Cialdini, 2001). While peripheral processing may be more relevant to situations of mass exposure and influence, it is conceptualised as a lower effort route to decision making and thus tends to be less enduring. In peripheral processing, the content and presentation of the message itself is significant. As summarised in Table 3, messages containing moral-emotional language (e.g., words like 'honour' and 'hate') increase the spread of moral ideas amongst ingroups, increasing the opportunity for influence (Brady et al., 2017). As such, emotion targeted influence may be a more powerful source within social groups than mere cognitive influence. Furthermore, some limited studies suggest disinformation and misinformation can spread easier and faster than factually correct information (Vosoughi, Roy & Aral, 2018). Emotional reactions to true and false news may differ (Vosoughi et al., 2018), once again highlighting the effects of emotions in influence campaigns.

Importantly, social media tends to provide heuristic rich information: longer posts may be more persuasive (even if they are inaccurate), those posts with more "likes" convey a norm or consensus of opinion that people may use to inform their own decisions.

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Table 3. Summary and overview of common heuristics and application to grey zone influence.

Heuristics	Definition	Application to grey zone influence
Emotions (direct and indirect)	'Mood as information' - emotions can act as positive or negative cues guiding judgements and evaluations. This can occur directly (i.e., some objects/experiences are already linked to a specific emotion through association/ experience) or indirectly (if one is in a positive emotional state, they are more likely to hold favourable opinions and vice versa). A 'good mood' also decreases likelihood of critical engagement with information.	Emotive messages will cue particular appraisals (understandings) of the situation more effectively than cold cognitive messages.
Attractiveness/liking	Attractive people are often perceived as being more likeable, trustworthy, and intelligent by increasing positive affect. People also tend to agree more with those they like; this may not only include attractive people, but those who look like and think like them.	Attractive and/or likeable sources (e.g., 'influencers') are likely to be more effective agents of influence.
Familiarity	The 'mere exposure effect' – when information is presented repeatedly (and from multiple sources), people become more likely to accept it. A consistent source is more persuasive.	Repeated exposure to a message from the same and/or different sources will exert greater influence, despite the strength of the content.
Expertise/authority	People tend to associate authority figures with having correct opinions.	Messages ostensibly presented by an authority or authority figure will be more influential than those which do not.
Message length	Longer written messages are perceived as being more valid or "correct". This invokes the feeling that the justification/argumentation is more extensive.	A longer message can be more persuasive than will a short message.
Consistency	The 'foot-in-the-door' technique. People tend to want to want to behave in a way that is consistent over time. Deferring to pre-existing opinions not only reduces doubt but provides guidance as to how to respond to future events.	People are likely to comply with a request if they have already complied with a smaller request.
Scarcity	Resources that appear to be becoming scarce or more difficult to attain become more attractive.	A message or opportunity delivered under time pressure may be more influential than one that is longstanding/available.
Consensus	'Social proof' – we look to what the majority view is in order to inform our own stance.	Communicating that a majority supports a particular position will be more influential.

Our analysis thus far has focused on the cognitive underpinnings of influence in terms of the attributes of people (i.e. their need for cognition) and particular situations (i.e. whether the situation would allow for deep or superficial processing). This analysis treats influence as a primarily cognitive phenomenon (i.e. linked to our internal thoughts and need to feel competent in our environment) but does not adequately address the social and relational aspects of influence. Influence, after all, is not just about changing thoughts – it is about reshaping people's definitions of the world and their place in it. With this observation in mind, the next section complements the focus on the cognitive to more deeply consider the social bases of influence.

Social influence is shaped by the need to belong

Humans are motivated by a need to belong, that is, the need to seek and maintain strong relationships with individuals and groups (Leary & Baumeister, 1995). One of the primary ways in which this sense of belonging has been conceptualised and studied in the psychological sciences is through the lens of identity. Although people often think of themselves as unique or idiosyncratic individuals there are many contexts in which people think of themselves in terms of group memberships with a shared social identity. Thus, identities exist at multiple levels of abstraction: they shape who we are as idiosyncratic individuals ("me and I"; individual identity), but also as members of groups ("we and us"; social identity) and even members of the human race (human identity; Tajfel & Turner, 1979; Turner et al., 1987). These identities become relevant in different situations implying that identity is relevant at all levels of analysis (micro, meso and macro). From this broad approach are derived two primary implications about the nature and effects of influence.

People have a fundamental need to belong, that is, a need to have and maintain relationships with other people and groups. This need to belong is often expressed via commitment to groups, that is, social identification. Group memberships ("we and us") can become the lens through which we perceive the world. Under these circumstances, social or group identities are far more important to understanding collective behaviour than cognitive or idiosyncratic attributes.

Influence occurs within and between people who share a group membership (identity)

A social identity analysis of influence places group memberships at the center of social influence (Turner, 1991). Our analysis above touches on the idea that one of the ways that people can achieve a sense of control and mastery of the environment is to know what relevant others believe and do (i.e. the consensus heuristic; Table 3). In fact, the situation is more complicated than that because while people are motivated to do and say the "right" things (reflecting an ostensible mastery need), they are also motivated to share an understanding of the world with the people around them reflecting a relatedness need (Festinger, 1954, see Figure 1). In this way, mastery needs interact with relatedness needs to shape who is listened to and accepted as appropriate sources of the world around us.

A key insight derived from the social identity approach is that ingroup members (that is, people with whom we share a social identity) are more persuasive than outgroup members (McGarty et al., 1994). Put differently, it is primarily where source and target share an identity (a social categorical relationship: "us" versus "them"), that influence will be mutual and will flow within the group (intragroup). Importantly, this is not a cognitive short-cut or heuristic in the terms considered above (Table 3). Such identities become a basis for perceiving a shared reality and in doing so are key to meeting mastery needs but also act to foster our sense of who we are, who we stand "with" and "against" (belonging need). A key implication is that, if in that context, the source of the message/influence is perceived to be an outgroup member, then they will be seen as less subjectively valid sources of "truth" than would an ingroup member.

People with whom we share a social identity (ingroup members) are seen as more important and valid sources of reality than are outgroup members. Conversely, information can be discredited if it is seen to come from an outsider. Influence can gain greater traction when it appeals to a common sense of "we" and "us". Grey zone situational awareness should seek to identify and describe the group memberships at play in each situation to map the fault lines of influence.

Group norms shape "our" values and how "we" can be persuaded

A second implication is that when a group becomes salient or relevant in a particular context, group members take on the norms, values and perceptions of the group in that context (Turner et al., 1987). When a given identity is salient (meaningful, relevant) to a context, people self-stereotype and in doing so take on group norms for how "we" think, feel, and act - in this way, our thoughts (cognitions), feelings (emotions), and actions (behaviours) are socially influenced (Thomas et al., 2009). If I am at a sporting match then my identity as a supporter of a sporting team is likely to be more relevant to shaping my perception of the group memberships in that situation. The sporting team identity will also be associated with normatively prescribed behaviours (jumping up and down, calling out), emotions (elation when we win, frustration when we lose), and beliefs (the referee is against "us"). If I am at work then my professional identity becomes relevant and my perceptions of what is normatively accepted and valued within that professional context will shape my values, feelings and behaviours (working quietly, attending meetings). Thus, group memberships are a primary way in which social influences "out there" shape and affect mass behaviour as a form of persuasive influence (Turner, 2005).

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Social identities are linked to group norms, that is, informal rules that shape emotions (what “we” feel), cognitions (what “we” think”), values (what “we” value) and beliefs (what “we” believe) of group members. Group norms explain why group members act in ways that are similar to each other but different to members of other groups. An effective way of exerting mass influence (across members of a group) is to shape the norms of the group.

A further important implication is that identities and norms in combination act to buffer the group from outside interference but also define “our” attitudes and values. It is well known that attitudinally congruent messages tend to be more influential than attitudinally incongruent messages (e.g., Taber & Lodge, 2006). The social identity account helps us to understand why this is the case: attitudes and values are both cues to the identity of the source (Hogg & Smith, 2007) – when someone relays a message or value that is inconsistent with one’s own group then they are immediately perceived as an outgroup member and their message is disregarded. Indeed, people are sensitive to cues that denote the membership of message sources, even in relatively anonymous environments (e.g., online; Lea, Spears & de Groot, 2001). On the other hand, where messages are tailored in such as a way that they align with the underlying attitudes and values that are held to be important by group members, they tend to be more successful. For instance, Luong et al. (2019) framed messages about fracking in a way that drew upon liberal and conservative values (respectively) and found that messages that adopted liberal language and values were more persuasive with liberal group members and messages that adopted conservative language and explanations were more persuasive for conservative group members.

Language provides important cues to identity. Messages that are crafted to draw upon (align with) the subjectively important values and attitudes of group members will be more influential than messages that use language of the outgroup or authority.

Such group norms also define who may be listened to as “an authority” and who is not. Returning to the example above, a fan of a sporting team would not be influenced by the football tips of a work colleague (who has no expertise on that topic) but that same colleague may be a source of influence in a work setting when that professional identity and its associated norms are salient. Turner (2005) argues powerfully that there is no way of determining the validity or value of information independent of the social context in which it is perceived. He suggests (p.3):

“The same information which persuades one group will fail to persuade another. One group’s expert is another’s crank. One does not accept influence from experts because of the information they provide (if one is not an expert, how can one judge its quality?), but accepts the information as valid because one defines them as an expert….” Building upon a de-contextualised analysis of influence as a display of “facts” or mere information from a source to a target, Turner (1991) suggests that influence is primarily about who is defined as an expert versus not and these definitions stem from the group memberships that are at play in that situation.

Finally, group norms also shape how information is shared and debated within a group, and the level of critical engagement with content per se (Levine, 2018). For instance, Postmes et al. (2001) demonstrated that groups can differ in the degree to which they emphasise the reaching of agreement (consensus) versus critical engagement. Groups that see critical engagement as important to “who they are” tended to make better decisions than those groups who endorsed consensus norms.

Group norms affect who is deemed to have authority (or not) and also help to determine how information is processed within the group (e.g., some groups emphasise “critical thinking” or not being a sheep as a defining aspect of their group membership). A particular narrative or influence message will be more influential if it adheres to the ways that group members typically regulate the flows of information within the group (e.g., telling a leader, elder or ruler before other people are consulted).

We seek agreement with the groups we are a part of, establishing social norms by reaching collective agreement (consensus). The cumulative insights of the mastery and relatedness sections then lead to the conclusion that cognition (thought) and social influence are inextricably linked.

Social influence and the need for autonomy

The need for autonomy reflects the basic need to feel that one’s decisions are self-directed and self-determined (Ryan & Deci, 2000). As seen in Table 1, influence functions as a means of social forces exerting beliefs, opinions and values (normative influence) and evidence of reality (informational influence) onto one another in search of agreement, ultimately leading to changes in thoughts, emotions and/or behaviour. However, any such (informational or normative) influences will be bounded by the degree to which people feel that they are encountering a message or influential agent of their free will, versus via coercive means. In this respect, people want to feel that they are playing an active role in the selection, exposure and (possibly) exchange of information. Linking with our analysis of identity, this need can exist at the level of the person (i.e. personal identity, see Ryan & Deci, 2000) but also exists in terms of the autonomy and self-determination of people as group members (Thomas et al., 2017). An analysis of the need for autonomy in the influence domain, then, points to an additional key element: it is necessary to further examine the power dynamics and relationship between a source and audience to understand the nature and effects of influence.

People have a fundamental need to feel that their individual and group interactions and decisions are self-directed and freely chosen. People are likely to be more open-minded to influences that are invited relative to those that have been encountered via force.

Legitimate authority and coercive power.
Turner's (2005) three-process theory of power suggests that there are three paths to power (defined as akin to influence, getting people to do what one wants). Our analysis of the need to belong highlights that group members will freely and autonomously take on the norms, values and attributes of groups to which they are identified and, in that way, group members can shape what is seen to be real and true. This is the path for persuasion-based influence – power through people rather than over people. However, his three-process theory of power suggests that there are two other paths: one based on authority and another based on coercion.

Authority can be understood as the capacity to influence because people believe that it is right and appropriate for this person, organisation or institution, to exert influence on certain matters. Inherent to this definition of authority is that people will voluntarily comply with the decisions of authorities where those authorities are deemed legitimate (Tyler & Lind, 1992). Legitimacy refers to "the belief that authorities are entitled to be obeyed" (Tyler, 1997, p.323). Legitimacy is particularly important because a legitimate authority will be obeyed without rewards or the threat of punishment per se. Indeed, for influence to be accepted and internalised as a deep, privately held conviction (see Table 1), authorities must establish a sense of legitimacy in terms of their relationships with groups and group members.

However, 'legitimacy' is an attribute that one can make about authorities or leaders. Linking with our points above, who is deemed to be a legitimate authority is itself a product of influence, because it is itself based on norms that a specific person, role or group has the right to prescribe attitudes or behaviours (Turner, 2005). The degree to which an authority has the right to prescribe private beliefs will also depend on the nature of the group and the scope that it affords the authority in question. Importantly, this form of authority-based influence is predicated on a shared identity between the authority and the group members who are the targets of influence (Tyler, 2001).

Coercion, on the other hand, is a form of influence that is exerted across group boundaries, when there is no a priori shared identity between the influencer and target (Haslam, 2004). Coercion is antagonistic to the need for autonomy, frustrating the need to be seen as competent and in control (Tjosvold & Sun, 2001). Turner (2005, p.13) suggests that coercion is inherently a conflictual attempt at control adopted only when other forms of influence are not available – it is the "power one uses when one? does not have power", that is, when persuasive and authority-based paths to influence are not available (see also Kumar, 2005). Whereas persuasive normative influence and authority-based influence are forms of power exerted through people, coercive influence reflects power over people, by virtue of capacity to deliver on threats. It may be effective in exacting short term and/or superficial changes in the target but the maintenance of any such changes involve continued coercion and/or surveillance which further constrain the freedom of the target and frustrate needs for autonomy. For example, coercive strategies have been observed to be counterproductive to compliance, provoking hostility and aggression while reducing willingness to engage in co-action (Hausman & Johnston, 2010).

People will accept and enact the vision of an authority (as a form of authority-based influence; Turner, 2005) when that authority fosters a shared sense of identity between themselves and the group. Coercive tactics makes salient disagreement with and difference from the source (i.e. an intergroup divide), promoting private rejection even if it elicits public conformity.

Deductive paths to shared identity: identity leadership and change.
Our analysis thus far focuses on the shared relationships between authority and groups, as well as the strategies that leaders can use to position themselves relative to the group and shape the thoughts, feelings and beliefs of people based on persuasive or authority-based influence. Yet our analysis is also limited on two points: first, it has tended to discuss the role of identities as entities that already exist and we have not yet directly addressed the influence processes via which new groups may form. Second, influence does not simply flow "top down". Group members themselves play an active role in communicating, contesting and shaping group norms (Postmes et al., 2005). In that sense, social influences can be deductive (i.e. group members can 'take on' the norms and values of a group that they identify with based on information available in the social context) or inductive (i.e. group members can directly influence each other through social interaction, Postmes, Spears, et al., 2005; Postmes, Haslam et al., 2005). Both routes to identity-based influence provide a basis for engaged, autonomy-supportive influence and cooperation (even in multi-party negotiations; Swaab et al., 2008) but the process is quite different.

What are the processes through which a higher order identity can be used to shape effective persuasive and authority-based influence? Haslam (2004) highlights that – even in negotiation situations where negotiators can choose between coercive threats and persuasive promises – finding ways to identify and craft a higher-order shared identity between two conflicting groups is the most positive way to manage conflict and promote cooperation. Importantly, the most successful strategies will build a higher-order identity based on recognition of meaningful sub-groups: for example, Australia and New Zealand may be two separate democratic nations, with their own strengths, roles and perspectives, but they share a commitment to (and identification with) a rules-based order.

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An effective way of exerting influence is to craft a higher-order social identity between two groups but these should still incorporate meaningful recognition of the strengths and unique attributes of the sub-groups.

Research on identity leadership – that is, the process via which a leader or authority is able to actively shape followership via a sense of shared social identity ("we and us") – highlights four key dimensions that inform the construction and maintenance of a shared social identity between leader and follower (e.g. Steffens et al., 2014). These are summarised in Table 4.

Authority-based influence will be more effective where that authority is seen to represent the unique qualities of the group, actively seeks to benefit the group (versus themselves or other groups), cements the reality of the group, and delivers structures that improve the lives of group members.

Inductive paths to shared identity: grassroots influence and change.

The inductive pathway of influence suggests that influence can flow horizontally such that the characteristics of individuals within the group actively influence and shape a novel, emergent or new group. Under these circumstances, idiosyncratic attitudes and beliefs (i.e., aspects of a person's personal or individual identity) – shared with other group members via interaction, discussion and debate – form the basis for shared self-definition (i.e., social identification; "we are a group who oppose vaccination"). This inductive pathway to social identity formation implicates a critical role for (online and face-to-face) interaction as the engine room of psychological group formation.

Smith, Thomas and McGarty (2015; also Thomas et al., 2010; Thomas, McGarty & Mavor, 2009) developed these insights and applied them specifically to understand the role of grassroots, novel or 'emergent' social identity formation in the context of social movements. They propose that new shared social identities develop when people are motivated to communicate their opinions and ideas about how the world should be. That is, alongside identities based on nation, ethnicity or community, people can also identify with groups based on their opinions (opinion-based groups, Bliuc et al., 2007). Thus, people can be pro-vaxx, or anti-war and, when they do identify with such groups, all of the consequences of such psychological commitment apply: people will tend to be persuaded by people who share their group membership (ingroup members) and behave in line with group norms (e.g., vaccinate one's children, disseminate anti-war information).

Moreover, when people discuss their opinions about "how things are" (i.e., the status quo, the prevailing norms and standards) and "how things should be" (i.e., their desired social change, how things could or should be), and these are aired, shared and validated with other people through social interaction (discussion and debate), it forms the basis for novel, emergent social identities based on those opinions (e.g., pro- or anti-vaxx; pro- or anti-war). Through communicating ideas about some desired state of affairs, "people can convert those ideas from subjective personal perceptions to socially validated and socially shared cognitions" (Smith, Thomas et al., 2015, p. 544), and in doing so form new identities that provide a psychological basis for influence and co-action.

Table 4. Dimensions of effective identity leadership.

Identity leadership	Definition	Application
Prototypicality	Being one of us. An authority that represents or encapsulates the unique qualities that uniquely define that group.	An authority that is seen to represent the unique qualities that define the group will be more influential.
Advancement	Doing it for us. A leader or authority who is working to promote our collective interests and goals.	An authority that is seen to be seeking to advance the shared interests of the group will be more influential.
Entrepreneurship	Crafting a sense of us. Leaders actively seek to develop and maintain a sense of "who we are", as well as define group norms, values and beliefs that provide meaning to group members.	An authority that is able to bring people together in such a way as it crafts a sense of who "we" are and who we are not will be more influential.
Impresarioship	Making us matter. The capacity of a leader to deliver concrete outcomes for the group.	An authority that delivers structures, events and activities that help to organize the group's existence will be more influential.

Influence is not merely top down but can also flow horizontally between citizens who, together, can discuss and debate how the world should be. Such interactions are important because they provide the basis for group formation (i.e., inductive social identity formation), that is, such influence processes enable new groups to form, to bring about, or challenge a desired state of affairs.

Summary and overview of micro-level influence

Our analysis of influence highlights the interplay between thought and context, but also the interaction between the content of the influence-attempt, characteristics of the source and audience member as well as the relational qualities that explain who source and audience are two each other. Influence involves more than just cognitive information processing (i.e. as reflected in the need for mastery). While the need for mastery examines the cognitive pathways to and factors in influence, the relatedness need highlights a core social dimension. Influence flows within group boundaries and, in this way, identity is the conceptual and psychological link between social context "out there" and effects on the thoughts, feelings and behaviour of people. The need for autonomy signals the need to understand not only the group memberships at play but also the role of power.

Identities are multi-faceted and apply at multiple levels. Every person has multiple identities – spanning micro, meso and macro – reflecting a variety of ways in which individuals are connected with the social world and vice versa. Each of these needs (mastery, relatedness, autonomy) can ostensibly relate to people as individuals and/or group members (i.e. members of communities, organisations, and nations). Effective situational awareness must take into account the factors identified here.

Meso

Group factors and the civil sphere

The success and failure of influence campaigns, as well as the unintended consequences that may derive from them, are shaped by group level factors and other meso level variables. Groups play a key role in legitimising and promoting beliefs, cultural codes, myths, ritual action, symbolic frames, and values (Turner, 2012). Associations, communities, informal networks and other civil society institutions critically direct how influence attempts are interpreted and the interactions and communicative acts that follow. The status and operations of groups are also relevant for societal resistance to malign foreign interference.

As much as individuals are driven by the basic psychological needs, those needs are all social and reciprocal in nature, and must be understood within social contexts. For democracies, there's a special arena of sociality that privileges pro-social, rule-based, truth-oriented meanings, what we refer to here as the civil sphere. Specifically, the civil sphere is that part of democratic societies constituted by values, emotions and practices of solidarity that facilitate social integration and public debate. As Alexander (2006, p.3) notes, the premise of the civil sphere is that 'societies are not governed by power alone and are not fuelled only by the pursuit of self-interest'. Meso factors in this sense relate to the civil sphere in that they involve symbolic ideals, the sense of togetherness and conceptions of the 'good life'. The civil sphere is directly consequential for influence as it allows for an appreciation of the ways in which communication and interpretation is contextual and contingent (Alexander, 2019). By examining the meso level, analysts attain key insights into why some attempts at influence will succeed in their aim, for example bringing about either social and political change or social disorder and cultural conflict, whereas in other instances similar campaigns fail or achieve only marginal effects.

The outcomes of influence campaigns are varied because individuals do not only act rationally but rather interpret messages in the context of group attachments and social context.

Meso analysis and social structure

The meso level is important for understanding how influence at the micro level of interpretation may develop in ways that result in the shaping of social structures (Turner 2012). Social structure is constituted by the accepted arrangements, institutions and patterns of behaviour that frame socialisation, provide social life with meaning, and effect the direction of social change. Social structural factors include norms, relationships, folk beliefs and accepted everyday practices. These operate beyond individual cognition and the immediate variables of social interaction. At the same time the relatively informal, bottom-up and convention-based nature of social structure differentiates it from macro factors: official dimensions of the social system, including the laws and institutions of the state (Serpa & Ferreira, 2019).

Whereas micro level analysis is the domain of Psychology, and the field of International Relations dominates analysis of the macro as it relates to issues of national and international security, the disciplinary area of sociology is the main intellectual area that engages in the analysis of meso factors. Sociology is the social science of social structures, societal trends and collective action. With its focus on groups and civil sphere dynamics, including how this can result in unintended consequences, meso level research is typically more controversial than the micro and macro. Comprehending the meso level requires relevant empirical evidence and detailed contextual analysis as social structure is complex and teemed with paradoxes. For example, the meso level is an intermediate space that connects the micro and macro, but it also actively shapes both (Lizardo, 2017). Social structure restricts and directs social behaviour and in doing so produces social order. However, it is simultaneously a resource for social actors and groups to bring about social and political change. While social structure is a feature of all modern societies and has some key principals that underpin its operation, its characteristics and dynamics also differ across groups, societies, and time periods. This cultural dimension is particularly significant for understanding influence transnationally.

Comprehending the meso level requires empirical evidence of social structure as it is subject to change and differs across societies.

Societal attachment and new forms of influence

Social conflict and political contestation is not new, but challenges to social and political stability today are distinctive. Meso factors are significant for understanding such conflict and the way it is exploited politically through social influence campaigns as they often relate to a weakening of cultural attachment. This includes how emergent alt right domestic extremist groups have justified political violence by their relative sense of deprivation and reimagining of national identity (Bauman, 2017; Fukuyama, 2018). Such groups have attained latent support through growth in public sympathy for conspiracy theories, something that demonstrates not only an incredulity towards democratic traditions but traditional notions of fact and truth (Osborne, 2021). The promotion of these sentiments frequently occurs through protagonists of new digital media genres such as online influencers (Baker & Rojek, 2019).While each of the above examples are shaped by various specific strategic interests and international relations, they all can also be broadly understood as being heavily shaped by some similar trends in social structure: declining trust and deference to modern narratives, knowledge and authority and an increasing sense amongst the public that the direction of social, political and economic change in recent

decades is failing to bring about a better society. Other social influence directly relates to increased societal attachments, such as those related to greater identification with past historical eras in nations that are strategic competitors to the West. These new identifications with the past frequently naturalise conflict over geopolitical borders and exclusive economic zones.

Social influence threats relate to changing levels and types of societal attachments and associated group identities

Having introduced the reader to the broad relevance of meso factors for social influence, the section below will outline the major meso level considerations for exerting and resisting influence. This is not a review of the vast empirical sociological insights relevant to understanding contemporary influence but rather an outline of the principal ways that meso factors are significant for policy makers and practitioners in attempting to curb malign interference or strategically engage in influence campaigns for positive outcomes.

Influence is multidimensional

A large part of the complexity in recognising and addressing malign foreign influence campaigns is that they are often closely intertwined or overlap with social structural factors, typically pre-existing social and political disenchantment. In this regard, policymakers and commentators often lack an appreciation of the multidimensional character of influence, assigning influence campaigns as the primary source of trouble. This denies the way that such messages interconnect with existing grievances or domestic narratives. When such a narrow diagnosis is undertaken there is a danger that associated mitigation strategies will be designed poorly and misapplied. To avoid such errors, it is best to see publics as being constituted by self-aware and reflexive actors and avoid value judgements that promote a view of either the audience being an undifferentiated mass or that certain groups are uncritically open to influence.

Even in cases where influence seems to be operating in a top-down linear fashion, there is typically an indigenisation process at play in which groups have understood and act upon messages in ways that relate to local conditions, cultural codes and established practices. From this perspective acts that appear deviant are frequently connected to past traditions and involve an attachment to society in ways that may not be obvious, but which significantly shapes the nature, impact and consequences of the influence. This multi-dimensional understanding of influence is particularly important for understanding how it operates cross culturally. In foreign contexts, messages will more likely succeed and avoid adverse unintended consequences if they can key into local cultural traditions.

The effects of influence campaigns should not be assessed independent of broad social and political factors that direct behaviour of groups.

Measuring multiple effects of influence campaigns in the post-truth age

Influence effects need to be assessed in relation to their potential for multiple effects, including potential latent consequences of influence attempts. For example, when influence campaigns seek to advance an extreme relativist comprehension of knowledge and prompt scepticism of claims to rational thought, this causes cascading and cumulative effects that are not whether publics subscribe to the certain beliefs or messages being forwarded but rather the consequence of a deluge of disinformation and misinformation might be publics becoming disenchanted with the notions of truth, with the associated questioning of expertise being something that is consequential for deference to state institutions.

The use of social media for exerting such influence is itself significant. Sociologists and media studies scholars have often highlighted how web 2.0 facilitates challenges to the role of experts and affords discourses of a 'post truth' world (Fuller, 2018). Post-truth discourse advances the idea that 'what one wants to believe is more important than what can be proved' (Monod, 2017, p. 151). Post-truth in this sense is not the rise of deception and lies but advancing the notion that ideas and beliefs should no longer require traditional degrees of plausibility or proof, that different knowledges are equally valid, and as such become only judged in relation to their perceived political orientation (Harsin, 2015). Ideas are still ranked but traditional measures of accuracy no longer have the same level of affect informing the grading process (Monod, 2017).

Countering such post-truth influence is more complex than looking to dispel certain claims and requires more social structural considerations. Often this involves engaging in the same media genres and rhetorical techniques used by advocates of post-truth culture rather than just relying on traditional communication forms and modern rationalist argument (Piltch-Loeb et al., 2021). The design of counter social influence campaigns also needs to account for the possibility that conflict has become an end or goal in itself, devoid of any clear position or goal. In such scenarios, advancing rational arguments are unlikely to be effective. Rather, evoking messages that are infused with symbolic meaning, such as those used for reconciliation purposes and advocate unity over division, may be required to bring about positive change. More upstream mitigation measures though are also significant in avoiding such circumstances, including public awareness and education programs that build general digital media literacy skills and advance cosmopolitan comprehensions of social and political change (e.g. Braddock, 2022).

Countering disinformation campaigns in the post-truth age requires strategic symbolic forms of communication that moves beyond the traditional confines of rationalist argument.

Meso

Avoiding unintended consequences of unity rhetoric
To successfully curb social influence disruption and positively influence populations, it is important to appreciate that social conflict, and even periods of social crisis, are part of a healthy society. While some forms of conflict may create pathological rifts in the social fabric, other instances and types of conflict enhance group cohesion (Wieviorka, 2013). This occurs by conflict creating release valves and initiating resolution processes that safeguard against the destructive aspects of social conflict. Episodes of conflict also frequently promote cultural discourses that underpin social cohesion and unity.

The clear lesson of the Cold War in terms of social policy is that demanding strict social consensus and national unity can easily go awry and lead to the identification and persecution of citizens as 'outsiders' in ways that undermines the moral authority of the state and civil society groups. The recognition of cultural diversity is important in this regard, keeping groups that might be labelled as being on the 'periphery', attached to the 'centre' of the society (Shils, 1975).

Influence attempts can fail to appreciate minority groups and unintentionally advance marginalisation.

Successful influence campaigns need to recognise diversity in values spheres
Social influence campaigns not only need to account for cultural difference as it relates to minorities but those generally considered as part of the 'centre' of society (Shils, 1975). Sociologists since Max Weber (1958a [1917]; 1958b [1919]) have pointed to society being constituted by a variety of different value spheres. These are subsections of society, often orientated to institutions, vocations, and professions, which make the everyday meaningful and create distinctive ways in which groups attach themselves to national society. If social influence campaigns target an undifferentiated mass of people in ways that encourages the conflation or undermining of different value spheres, this can result in a loss of meaning and attachments to the collective, an environment widely believed to promote fundamentalism and extremism (Gustafsson & Krickel-Choi, 2020).

Successful influence campaigns target or are inclusive of diversity within mainstream society.

Resistance to malign influence through supporting quality journalism and public sphere institutions
Maintaining avenues and spaces for respectful rational argument and discursive conflict resolution is an important measure for addressing malign influence campaigns that seek to create an environment of continual social conflict over the most basic of ideas and facts. What makes certain social conflict destructive, resulting in pathological rifts between groups, while other types of conflict eventually result in group cohesion (Wieviorka, 2013) is typically the social setting in which conflict occurs. Support for quality media and the public sphere more broadly is an important way in which policymakers can encourage conflict to result in social cohesion by helping to determine the social relations through which conflict is mediated (Wagner-Pacifici & Hall, 2012). Habermas famously defines the public sphere as 'a realm of our social life in which something approaching public opinion can be formed' (1974, p. 49). The public sphere is a critical dimension of civil sphere, underpinning its democratic and egalitarian character. In a broad sense the public sphere is the space that is available for all to engage in public debate and the sharing of politically salient information. This commonly refers to discursive spaces created between competing ideas presented both in situ and via the media, and also includes physical locations used for public gathering – such as coffee shops and town halls (Adut, 2012; Habermas, 1974). For example, studies have shown that societies that have a strong publicly funded television and radio, a situation that allows for investment in quality journalism, have greater voter turnout and less corruption (de Vreese & Boomgaarden, 2006; Van Aelst et al., 2017). By advancing trust in mainstream sources of knowledge, the public sphere can limit feelings of alienation developing and related types of cultural sentiments that often prompt the seeking of destructive mechanisms for dispute resolution, including using violence.

Societal resilience to malign influence can be enhanced by supporting and protecting the media and other institutions and spaces in which rational and respectful debate is undertaken.

Supporting cultural production to build societal resilience and exert influence
The diminishing of cultural fields can be destructive to the civil sphere and as such weaken democracy and national resources for exerting influence. By cultural fields (Bourdieu 1993) we mean a zone of social activity in which the creation of cultural products is undertaken. Cultural fields are important for the ability of groups to hold the power of government and industry to account. As outlined above, in the Cold War the obsession with national security in the U.S. threatened cultural fields through a demand for social uniformity and simplistic patriotism. This included an undermining of the traditional role of intellectuals as defenders of civility and tradition (Shils, 1956). Since the end of the Cold War the greater challenge to the relative autonomy of cultural fields comes from neoliberalism (Harvey, 2005) rather than directly from state authority (du Gay 2000). For example, recent mobilisation efforts in the West have found that deference to global free trade and economic profits can override the willingness of groups to support national security strategies.

A re-engagement of the state with groups actively involved in the production of culture (e.g. cultural industries, education, heritage, arts) is an important part of a national social influence strategy. This includes through re-establishing the types and levels of funding to these areas found during the Cold War. National culture can be an active force in building resilience to malign influence and being an important cultural basis for building partnerships in the Indo-Pacific region. However, by being largely driven by neoliberal rationales, cultural production

in Australia and other Western nations is open to being funded by foreign actors in ways that work against our national interest. At the same time our competitors are less susceptible to such social influence as their form of state capitalism facilitates a whole of society approach to Defence.

Financially supporting cultural fields in ways that allow them to have a relative autonomy from neoliberal economics will build resilience to foreign interference and maximise the ability of governments to exert influence.

Civil society and positively managing conflict

Support for civil society is an effective measure for exerting influence through providing a mechanism for positively managing conflict. Civil society is a key dimension of the civil sphere but specifically relates to the role played by community-based organisations, networks and activities of a social group that are not officially managed by the state. Such organisations range from sports clubs and religious institutions to political movements and unions. While these different types of entities are distinctive from each other in many ways, they all constitute civil society in that they provide an organisational space for shared participation in civic activities (Calhoun, 1993) and facilitate interaction between fellow citizens from various backgrounds (Edwards & Foley, 2001). This diversity and interactive dimension of civil society differentiates it from the more culturally homogenous and typically vocationally focussed nature of value spheres and cultural fields (see above).

Sociologists have empirically highlighted how a vibrant and healthy civil society has structural benefits for groups and that these mechanisms render destructive forms of conflict less likely to originate. Civil society can also play a role in initiating constructive social and political movements that hold power to account. The institutional context of civil society for such forms of societal protest and justice discourses are important in making civil society groups orientated to productive as opposed to destructive outcomes (Alexander & Smith, 1993). One way that civil society groups do this is by creating an infrastructure for social movements, with conflict more likely to have an orderly character. As Wagner-Pacifici and Hall (2012) point out, for conflict to have a productive resolution the parties involved need to coordinate and cooperate.

Civic organisations provide the meeting rooms, sports fields, groups, church halls and other settings with their associated rules and norms of interaction, which allow parties to negotiate and cooperate. In a sense civil society provides the spaces and norms necessary for disputes to be initiated and carried out in a civil manner. These entities often provide a model and discourses that can be drawn on by other groups and the government. This is evident in various post-conflict societies where civic organisations have played a key role in engendering political stability (Orjuela, 2003). Pinckney et al. (2022), for example, demonstrates that the presence of civil society greatly enhances the likelihood that social conflict in non-democratic states will lead to democratisation. Using the resistance movements in Africa from 1990 to 2015, Pinckney et al. (2022) show civic organisations, such as 'trade unions, religious organisations, and professional organisations have the durable mobilisation infrastructures rooted in everyday social networks that are needed to generate and sustain democratic transitions' (Pinckney et al. 2022, p. 4). Highlighting the direct importance of civil society to public sphere narratives, Hynes-Bishop (2022) argues that in the case of Colombia, the discourses associated with small local civil society activity was critical for the success of the civil war peace process in that it offered new ways of conceptualising the conflict and the enemy for both sides.

Civic organisations also work to feed information from citizens to governments and in turn aid the effective implementation of government policies at the local level (Putnam, 1995). In a cultural environment characterised by cynicism, if not hostility, towards the state, centrally organised government programs are typically met with scepticism that render them ineffective. In such cases, civil society organisations are more trusted sources of knowledge and as such are a valuable resource for addressing social problems in contemporary society in that their independence matters. In the US, for example, programs run through local companies and local government have had success in advancing counter narratives and upstream support for democratic processes and providing preventative measures of political extremism and violence (e.g. Braddock, 2022). This provides an alternative to punitive institutional and combative narrative of the criminal justice system, approaches that risk labelling and emboldening those that discursively support political violence (Miller-Idriss, 2022). However, neoliberal government policies have recently threatened the independence of civil society organisations independence from the state, lessening its potential role in maintaining social order.

In the contemporary social and political environment, civil society groups can be effectively engaged to exert influence to diverse audiences and initiate conflict in ways that constructively holds power to account.

Social capital and societal attachment through interactions with diversity

Other benefits of civil society that sociologists have pointed to are lower minority group unemployment, reduced crime rates and higher quality schools (Putnam, 1995), all of which tend to reduce competition over resources and values and thus lessen social conflict. Robert Putnam describes this inclusive aspect of civil society as the promotion of 'social capital': "features of social organization such as networks, norms, and social trust that facilitate coordination and cooperation for mutual benefit" (1995, p. 67). Social capital establishes community attachment because "networks of civic engagement foster sturdy norms of generalized reciprocity and encourage the emergence of social trust" (Putnam, 1995, p. 67). Incentives for individual opportunism is reduced as people contemplate the others in their networks or as people consider the 'we' as well as the 'I'. In Putnam's words, "Members of associations are much more likely than non-members to participate in politics, to spend time with neighbours, to express social trust, and so on"

(1995, p. 73). Whereas civil society generally relates to those within a group with a shared interest, Putnam (1995) describes how social capital is inclusive of a 'bridging' function, being more outwardly focussed, establishing social bonds between individuals in otherwise diverse groups.

Such interactions address perceived depravation that has been pointed to as an important sentiment amongst the groups from which extremists emerge. While inequality is an important macro measure for addressing the potential for extremism, humans are quite poor at assessing perceived levels of inequality and injustice, something that creates imagined exaggerations of depravation and a sense of victimhood. Attempts at building social capital are important in this regard to counter disinformation and political extremism as studies have highlighted how humans conceive of themselves in reference to those in who they have close contact.

The idea of influence occurring through the lived experience and the embodied and experiential opportunities for meaning-making provided to groups is consistent with early media and communication research that emphasised the significance of peers. Katz and Lazarsfeld's (1950) book *Personal Influence*, for example, highlighted the continuing fundamental significance of interpersonal relationships for shifting beliefs of the audience despite the emergence of mass communication. In effect media messages have most impact when they also align with communication within small, intimate groups, whether that be person to person sharing of opinions and attitudes or person-to-person communications networks. In both cases personal communication is often significant as a mediating factor for attempts at exerting influence through the media, whether it be mass media or a more niche digital form. As online and digital media has become ubiquitous in our lives, there is a need for more analysis of 'personal influence' that comprehends the interconnections between media messages and engagement with social groups, and small group communication (Couldry, 2014).

Encouraging commitment to local groups and meaningful personal interactions between individuals of different groups can discourage political extremism through attachment to diverse social identities.

Volatility of meaning in times of disaster and crisis

Influence campaigns have the potential to be most significant and detrimental during times of disaster and crisis. In such episodes, social mechanisms work somewhat differently, with symbolic frames and narratives taking on a heightened significance. While times of disaster and crisis can have the effect of bringing about social unity, as seen in the relation to the Covid-19 pandemic they may also bring about competition between groups in ways that disrupt the trust they have in state institutions and other groups. In Turner's terms (1974), disaster and crisis are associated with periods of 'liminality' where exceptions to existing dominant norms and cultural processes are frequently permitted. While these 'anti-structural' responses are typically temporary, they can become an event that embeds and normalises particular social structures, including through becoming associated with the sacred remembrance of these events.

Such events in Sewell's (1996) sense, can be considered to have causal characteristics, bringing about new societal directions and futures. As Wagner-Pacifici (2017) highlights in cases that include the September 11 terrorist attacks, fundamentally what is at stake in events, are identities, loyalties, social relationships, and our very experiences of time and space. The danger of disinformation campaigns via social media is heightened during such times, particularly if traditional media and communication sources have been disabled. The loss of trusted news and information sources is particularly consequential, as research has highlighted that traditional media sources generally attain greater significance during such periods. However, studies have also shown that these periods also have significant potential for counter narratives to emerge from them, highlighting the potential of positive influence campaigns. For example, using various historical cases including the Suez crisis and Iraq wars, Smith (2005) has argued that it is the genre that develops in the national public sphere during times of crisis, rather than political or economic interests, that influences whether contemporary nation-states decide for or against using military means to address security threats. Similarly, West (2008) outlines how in the Australian public sphere circumstances and media practices allowed for a counter narrative to emerge in response to the narrow nationalist rhetoric that immediately followed the Bali bombing terrorist attack. This counter narrative worked to dampen hyper critical voices of the Indonesian state and promote a dialogical sense of joint suffering, something that has resulted in ongoing productive joint security operations between the two countries.

Malign foreign interference can be most destructive during times of disaster and societal crisis, however, such events and periods are also ripe for counter narratives to be encouraged.

Generations and message targeting

Societies are increasingly plural with rapid social and political change making generations an increasingly important source of group identity (Corning & Schuman 2020). The generational divisions and identities though differ across societies and can also often be overstated in the popular imagination (West & Aarons, 2016). Generational thought can also see diversity within age cohorts being overlooked. For influence campaigns to correctly identify target audiences, age is a critical factor but the complexity of generations also mean that assumed generational characteristics can result in unintended consequences. For example, while young people tend to be more cosmopolitan in their worldviews than older generations (Beck & Beck-Gernsheim, 2009), Miller-Idriss (2009) has identified that the way in which this is advanced in the German education system, often creates a backlash amongst young people who want to have a sense of pride in being German, an important factor contributing to the making of radical right-wing groups. For this reason, generational target analysis for

social influence campaigns needs to be informed by strong empirical evidence.

Both youth and elderly citizens though are major groups targeted by influence campaigns. Rates of criminal and deviant activity across the lifecourse (Benson, 2012) suggest that adolescent children and young adults might be particularly open to influence effects as they are yet to establish firm identities embedded in vocational and marital arrangements, and as such are more open to engaging in deviance. For this reason, nations that have large populations under the age of 30, much of Africa and many Pacific nations for example, face particular security issues. In the cross-cultural context it is particularly important that youth is not associated with being pro-Western or politically progressive, with various cultural contexts demonstrating a cultural turn amongst youth towards conservatism. For example, as Saefullah (2022) outlines, in Indonesia in the 1990s, youth subcultures were largely secular and multicultural, largely mirroring new left Western politics. In contrast, much youth subculture today is orientated to an Islamic revivalism, with rising intolerance towards religious difference (Laksana & Wood, 2019). In the West it is the 'ageing population' with the overrepresentation of those born in the two decades following WWII that potentially poses a far greater risk in relation to disinformation. For example, older adults were the most likely to be exposed and also share fake news during the 2016 U.S. election (Brashier & Schacter, 2020). While research has consistently shown that political attitudes remain largely stable as individuals age (Peterson, Smith & Hibbing, 2020), there is some evidence to suggest that the elderly are particularly susceptible to disinformation, being more likely than other groups to experience fear and panic as a consequence of their exposure to fake news (He et al., 2019; Rocha et al., 2021). This in part relates to lower levels of digital media literacy amongst older adults but it also potentially reflects greater anxiety about societal change.

Young people are a significant influence target due to their openness to identify with and engage in various forms of deviance while older adults are more likely to experience fear and panic from exposure to fake news.

Macro

Influence at the macro level typically focusses on actions at the scale of national and international actors, and the environments (national political and social systems, strategic environments) in which these actions take place.

In this section, we examine influence as a concept and a practice by foregrounding the following questions:

- How do nations (or aligned groups of nations) attempt to exert influence – what actions do they undertake, across the spectrum from competition to conflict, with malign or benign intent?
- What makes a nation influential, and how are nations influenced: what conditions lead to influence occurring, or not?
- What national characteristics, capabilities and cultures affect a nation's capacity to, vulnerability to, and resilience to, influence? What informs foreign policy and other whole-of-government decisions related to influence actions? What factors, processes, social groups, social networks and political cultures lead to nations doing what they do?
- How is influence embedded in systems of relationships? What aspects of the international system facilitate and/or constrain influence? How does this vary according to the capabilities and characteristics of nations, of regions, of groupings, of other actors?

International relations theory provides a bases for conceptual development of influence at a macro scale. For clarity and expediency, and following Sussex (2022) three main approaches suffice: realism, liberalism and constructivism.

Realism in International Relations foregrounds nation states as the primary actors and understands relations between these actors as occurring in an environment largely absent of universalizing moral or legal systems that impose constraints on actors' behavior). While constraints and cooperation may and do occur, power, in its many forms but predominately material power – economic and especially military power – are the main, if not sole, determinants of how nations act in their own interests.

Liberalism similarly identifies the nation-state as a, often the, primary actor in international relations. Yet, where realism tends to understand power in relative terms – a competition in which one's gain is another's loss -- liberalism foregrounds the potential for mutual gains for nation states who enter in international relations. This is clearly evident where relations are cooperative, such as in joint security arrangements, co-development projects, international agreements on matters such as addressing environmental concerns or non-state threats. Gains are also possible through competitive economic relations, based on the idea that free and open trade encourages efficiencies in global markets. In other words, liberalism views free and open global trade as benefitting all economically, with the additional value arising out of economic interdependence being that nations that are intertwined have more to gain from stable and peaceful economic competition than they do from conflict.

Liberalism sees cooperation as being optimized where parties abide by agreed, understood, universal rules and norms. What this international order is, who gets to decide how it operates, who gets to participate in it, and whether (or to what extent) it operates as one order or a multipolar network of interdependencies and contests – these are ongoing questions that are going to define and shape liberal international relations for some time.

Constructivist frameworks are based on the notion that identities and ideas are essential aspects of international relations in that they underpin how nations form their understanding of the world, their place in it, and the nature of relations between states. Ideas and identity also drive decision making that leads to action by nation states in the international arena.

Constructivist approaches allow for multiple, different interpretations of strategic circumstances and international events, and are therefore especially useful when seeking to understand, and shape, influence. The emphasis is on a greater range of actors and factors than realism's emphasis on material power and liberalism's emphasis on globalised diplomatic institutions and trading networks. In the parlance of defence, it includes all the 'dimensions of national power' – typically understood as diplomatic, informational, military and economic (DIME), or including financial, intelligence and law (DIMEFIL) or as six domains: political, military, economic, social, information, and infrastructure (PMESII). Moreover, constructivism includes these dimensions of power as acting in concert with one another (see section below on characteristics and capabilities).

In addition to incorporating multiple dimensions of national power, constructivism includes consideration of the multiple actors in the environments in which national actors act. This is necessary in an international system comprised of many nations, many of whom are engaged in multiple and various relationships, as well as non-state actors – NGOs, trans-national corporations, international crime syndicates, and extremist political and terrorist groups. This extends the conceptual range of actors, and audiences, engaged in international influence operations beyond nations and international institutions. It also foregrounds a greater diversity of influence discourses, and greater variety of influence campaign objectives.

Constructivism has an important focus on the role of identities and cultures in shaping how groups understand the world and act in it. This draws into sharper focus the diversity of views and range of approaches to international relations and foreign policy by various nations, challenging over-generalised assumptions about shared values, priorities and strategic mindsets. The risk here is that analysis can be based on stereotypes about national character, myths and motivations (Sussex, 2022). Avoiding this requires deeper and more sophisticated knowledge and understanding of the national cultures and histories.

In practice, these three main frameworks for understanding influence at an international and national scale can be utilised in concert as a means to consider the multifactorial elements of influence.

Realism underscores how some elements of influence are intrinsically bound in national material power. Assets like geographical size and position are virtually fixed. Economic heft and prospects, due to natural resources, population growth and productivity, are less fixed but remain undeniable expressions of the extent, and limits, of national power. Realism also grounds analysis in the cold, hard questions about interests and power.

Liberalism's emphasis on international interdependence highlights not only the material benefits of global systems of trade, but also the practical necessity for many states (namely, those that are not by themselves powerful enough to deter adversaries) of collective security arrangements. This draws attention to the role of international cooperative institutions, practices and norms, and the value of participating in, employing, and shaping these institutions as a means of exercising influence in the world.

At the intersection of these three paradigms lies the potential of combined explanations and multiple perspectives (itself a constructivist idea). Multiple points of view can be productive when they align, when various frameworks of understanding result in supportive conclusions. They can also be useful when they act as handbrakes, through the provision of opposing arguments that, while introducing complexity, may guard against over-reach through over-simplification.

Influence activities across the spectrum from cooperation to conflict

International Influence efforts include a range of activities, strategies, and goals. While typically there is a tendency to delineate between the various forms of influence activities, our arguments are that (a) activities need to be integrated into an overall grand strategy and supported through whole of government approaches to statecraft, and (b) that certain underlying principles regarding how influence operates can be applied to influence activities across the spectrum from cooperation to conflict. The range of influence activities outlined here should be read with these arguments in mind.

International influence efforts include benign, ordinary, normative and even beneficial activities, such as the various forms of diplomacy (public, cultural, elite and so on), nation branding, soft power, engagement, partnership, and activism for international agreements and 'global public goods' (Kaul, et al, 2003). Such activities are founded in liberal approaches to international relations in that they are examples of both beneficial competition and cooperation.

International cooperation is an often over-looked but essential and ubiquitous aspect of international relations, increasingly so as globalisation has progressed. Recent challenges to internationalisation, such as national populist politics, supply chain challenges due to the COVID-19 pandemic, and emergent coercive economic practices (of which, more are below), have shaped globalisation, and sharpened the need for robustness through a mixture of increased sovereign capability and more diverse international commerce.

However, international cooperation remains essential for addressing international problems. Some of the basic requirements for contemporary life, such as international communication and transport, are government by international agreement. Many of the world's most intractable tribulations, including climate change and environmental degradation, the plight of refugees and displaced persons, transnational criminal activity, and the threat of nuclear conflict, can only be meaningfully addressed involving international institutions and relationships. This remains the case even though attempts to address such issues are inadequate, inevitably entwined with domestic political requirements and geo-strategic considerations. International cooperation remains both imperfect and essential. Its results vary. Its successes, even when significant, are often impermanent.

Participation in international cooperative efforts, in addition to having intrinsic merit, is also a means to develop positive relationships and an enhanced reputation. The opposite is also possible: obstructionism or direct opposition to international collaboration can be deleterious. As such, cooperation, or lack thereof, impacts on all other aspects of international relations, from government negotiations and security partnerships, to cross-cultural people-to-people ties, to international marketing efforts.

Beneficial competition is evident in activities that seek to develop a nation's strategic narrative and its national brand, in order to enhance its soft power[3]. Such activities include: cultural and public diplomacy activities undertaken by ministries of foreign affairs; promotional and marketing efforts engaged in by the non-government sector (both commercial and non-profit); and campaigns by those organisations, like national tourism and marketing agencies, that act across the public-private sector.

Nation branding and soft power is an area of international influence where the macro, meso and micro levels of society are interwoven in several ways. In Nye's formation, soft power is an outcome of the appeal of a nation's culture, political values, institutions and foreign policy. Therefore, individuals, groups, communities, institutions, society and government all are potential contributors or detractors to a nation's soft power and therefore its reputation and relationships, and

[3]For the sake of conceptual clarity, nation branding refers to what a nation does while soft power is something a nation has; nation branding and strategic narratives contribute to soft power.

Macro

therefore its influence. One implication of this, as Aronczyk (2013) points out, is an implicit soft nationalisation of society, wherein individuals, civil society and the private sector are (inadvertently or deliberately, and for better or worse) charged, or burdened, with the role of representing the nation.

Influence, in this view, is a whole of nation effort. As such, it carries obvious benefits and risks. Where cultural products are associated with national identity, they can be targeted as sites for influence in various forms including consumer boycotts, online targeting via fan-based networks, and advocacy campaigns. Additionally, the involvement of the private sector as a vector for influence includes the appeals of attractive consumer products, cultural attractions, and the like; it also creates the conditions for economic coercion.

Strategic competition and coercion
In principle, if not always in practice, it is possible to distinguish between liberal competition as an essential, and valuable, aspect of international relations, and strategic competition that operates outside diplomatic and trading norms and seeks advantage through various forms of malign and coercive statecraft. Deliberately falling below the threshold that provokes military responses, these forms of strategic competition are characterised as liminal or grey zone conflict (Killcullen, 2000); when they are used in combination with kinetic forms of combat, they can be included as aspects of hybrid warfare.

Coercive statecraft – political interference and economic coercion
Strategic competition includes forms of coercive diplomacy, which seeks outcomes through threats, demonstrated resolve and actions short of conflict such as sanctions and embargoes (George, 1991). In diplomatic theory, the concept of coercive diplomacy (Bjola & Kornprobst, 2013) typically refers to the use (or threat) of military or economic power but includes 'forceful persuasion' (George, 1991, p.4).

Coercive statecraft includes covert and non-attributable efforts to deceive and coerce, to weaken nations through interference in the information environments (Bjola & Pamment, 2018), domestic affairs, and political processes of sovereign nations, and to otherwise seek advantage outside of international norms. The practice of interfering in the domestic affairs of a sovereign nation has a long and storied history. It was a key feature of the Cold War, involving both sides of that struggle in various forms (Rid, 2020, inter alia). In the post-Cold War era, there have been numerous examples of attempts to target democratic systems and processes. Reports on these campaigns have sought to analyse: (a) the identity of the responsible actors (who), (b) the campaign products and activities (what and how), (c) the strategic goals of the campaign (why), and (d), most problematic, the outcomes and impacts of the campaign (what effects).

Of these campaigns, the most infamous, and most studied, case study of malign foreign interference is the Russian operation to target the 2016 Presidential campaign. The who, what and how, and why of this campaign is well established: a Russian effort using online disinformation targeting groups based on pre-existing grievances, and amplifying strategically useful narratives throughout the media ecosystem, to undermine confidence in the electoral process, or affect the election result, or both. But ascertaining the effect of the Russian campaign is more fraught due to the many actors and variables. The difficulties and possibilities of assessing the impact of online foreign influence campaigns, including case studies of some seminal research in this field (Hall Jameson, 2018; Mazarr, et al., 2018) are discussed further in the companion report on influence indicators.

Economic influence and coercion
Economic influence includes benign forms, such as the provision of development assistance and access to markets, as well as official economic sanctions and other types of economic coercion. Official sanctions are imposed through formal processes, typically through international bodies like the United Nations, and openly target a country to deter it from a course of action or compel it to a preferred alternative course of action. Economic coercion, on the other hand, is not 'sanctioned' by international law, and as such may be subject to disputation at international agencies such as the World Trade Organisation. Economic coercion may include punitive actions such as increasing tariffs, additional customs or quarantine requirements, restrictions on visas and licences to trade, cancelation of contracts and the like. These actions may be accompanied with an official explanation to offer the appearance of legitimacy, although such pleasantries may be dispensed with where a sterner message is intended.

While the overall purpose of economic influence is generally consistent – to deter or to compel – the strategy may vary according to the nature of the targeting regime. Sanctions against autocratic regimes are more likely to target elites and key decision makers. Against democracies, economic influence has to also consider the impact on public opinion. Gueorguiev, McDowell and Steinberg (2020) outline how publics can react rationally, based on a calculation of material interests, to either resist economic coercion or give in to it, or can react against economic coercion on the basis of identity.

In addition to public opinion, economic influence is also subject to the economic resilience of the targeted nation: the more resilience, the greater the capacity to resist economic coercion. Resilience includes several possible attributes, including the size and diversity of the domestic economy, the diversification of other sources of international trade and investment, and the exposure of the coercing nation to the negative consequences of their actions.

Economic coercion differs from military strategies of deterrence primarily in that they do rely only on (although they do not preclude) the threat of future violence. An additional

purpose of economic coercion may be to demonstrate the coercer's capacity and willingness to other nations, to deter them from acting in ways that might see them similarly targeted.

Coercive actions suffer from two great uncertainties: the intent of the actor, which is often disguised or hidden behind a façade of acceptable behaviour, and the interpretations by the target country that shape their response. Jervis, Nebow and Stein (1985) conclude that participants almost never have a good understanding of each other's perspectives, goals or specific actions:

Signals that seem clear to the sender are missed or misinterpreted by the receiver; actions meant to convey one impression often leave quite a different one; attempts to deter often enrage, and attempts to show calm strength may appear as weakness (1).

Deterrence, coercion, competition and cooperation, in this view, is contingent on interpretation by the target. In the next section we consider these targets – audiences and/or publics – and develop the conceptualisation of the macro level of interpretation and its relationships to the constituent meso and micro levels.

Influence efforts between nations exist across the spectrum from cooperation to conflict. They include benign, ordinary, normative and even beneficial activities. They include covert and non-attributable efforts to deceive and coerce, to weaken nations through interference in the information environments and to otherwise seek advantage outside of international norms. They include forms of coercive diplomacy, which seeks outcomes through threats and actions short of conflict such as sanctions and embargoes.

National characteristics and capabilities

Influence is in part a measure of a nation's characteristics and capabilities. In Dahl's (1957) seminal definition, these are considered the 'base of power' – not a complete accounting of how power works, but a foundation for some of the ways in which an actor, in this case a nation, may seek to project power.

Characteristics refers to geography and demographics as well as less tangible features such as reputation, status, identity and strategic narratives. Capabilities refers to dimensions of national power including diplomatic, informational, military and economic (commonly referred to as DIME) and occasionally including financial, informational and legal dimensions (known as DIMEFIL). Military power, supported by economic power, typically is referred to as hard power, whereas ideational and reputational dimensions can be referred to as soft power, and the combination of these has been named smart power (Nye, 1990). To these, Miller adds 'ambitious interests' as a characteristic, referring to levels of determination and commitment regarding the use of its capabilities to achieve foreign policy goals (Miller, 2021), related to the 'national will to fight' (McNerney, 2018), although the latter may also refer to defensive operations.

National characteristics and capabilities may be, and often are, measured and utilised as indicators of national power. This is discussed further in the Indicators section. Here, the point needs to be made that where these measurements of separate dimensions of power are combined to form an aggregate value, and this deemed to be an indicator of a nation's total power, this is conceptually inadequate for a number of reasons.

First, these characteristics and capabilities refer to what seminal political theorist Robert Dahl (cited in Long, 2022, at 61ff) refers to as the base or source of power, which is only one of four ways to conceptualise power (and thus influence). The other three factors to consider include (1) the means or instrument of power (how power can be exercised, such as through threats and promises) as well as (2) the amount (how much) and (3) the scope or range (how far) of power. These factors are variable, contingent and contextual, as discussed in the section on relationships, below.

Second, it may be misleading unless the dimensions of national power are aligned strategically and integrated operationally. The importance of integration of the DIMEFIL dimensions of national power is explicitly stated in the Australian Government's (2023) defence strategic review, which outlines an approach which focusses on aligned activities in the name of combined statecraft. A recent Joint Doctrine note on Defence Strategic Communication from the UK Ministry of Defence (2019) (UK JDN 2/19, discussed further below) makes a related point when it outlines how all aspects of defence activity – training, acquisitions, deployments, missions, publications – communicate, but that what message these activities communicates will vary according to how various audiences interpret them.

A third reason that aggregated measurements of national dimensions of power are, while useful, problematically inadequate is that these lead to the assumption that larger states matter more than smaller states – that, in the oft-cited realist maxim from Thucydides' Melian Dialogue: the strong do what they can and the weak suffer what they must. However, smaller states that are relatively lacking in the traditional forms of material power may possess specific resources that create opportunities for influence (Long, 2022). Such resources may be material, such as valuable commodities, such as small Gulf states with large hydrocarbon reserves, or strategic locations, such as pivotal positions in global transport systems (such as Panama and Singapore). Resources may be ideational, such as a moral authority to intervene due to a reputation as a good global citizen, or the legitimacy to speak on behalf of, or be an interlocutor with, assemblages of nations with similar interests.

Macro

In the case of material assets, small states can exercise influence through threats to withhold, or promises to grant, access to these resources. The extent of the influence is therefore dependent on the context – influence is contingent on the extent to which the resource is desired. In the case of ideational assets, influence is additionally derivative, based on the salience of the issues and the strength of the relationships, of which more are detailed below.

Pacific Island nations, for example, enjoy a combination of material and ideational resources. Materially, though small in land area, population and economic heft, they are also 'large ocean states' (Long, 2022, p. 62) comprised on small islands spread out over wide ocean spaces. Their large marine territory covers a large proportion of the ocean, including valuable fisheries and shipping lanes. The strategic importance of the positions of these islands has been evident since the Second World War. Ideationally, Pacific Island nations can speak with considerable moral authority on matters such as the exploitation of ocean fisheries and climate change, being directly exposed to the negative effects of both. The colonial histories and ongoing neo-colonial experiences also align them with nations and people with similar heritages, and impacts their relationships with former colonial powers and present great powers.

A nation's influence is a product of its characteristics, its capabilities and its 'ambitious interests' (Miller, 2021). Characteristics refers to tangibles such as geography, and demographics, as well as less measurable features such as reputation, status, identity and strategic narrative/s. Capabilities refers to dimensions of national power including diplomatic, informational, military and economic (commonly referred to as DIME). Therefore, influence involves whole of government and whole of nation approaches.

Relational influence – major, middle and minor powers[4]

Major powers
The actions of, and relationships between, major powers has typically been at the foreground of international security concerns. This is understandable. Great power conflict or the threat thereof resulted in wars, hot and cold, in the twentieth century, and has re-emerged as a driver of international strategic instability. Moreover, major powers act differently. They "seek special privileges and "their pretensions may influence the external conduct of the power structures." This situation has not changed. Great powers exercise more influence than ordinary states, and leaders of great powers assert their right to rule on the basis of their ability to maintain order, which they describe as in the common interests. (Lebow, 2016, pp. 7-8, citing Max Weber).

Middle and minor powers
The focus on major powers often leads to a characterisation of nations according to the relationship relative to the major power/s of the day: either as ally (or 'strategic partner') or challenger, or non-aligned (Mazarr, Blank, Charap, et al., 2022). However, the focus on major power relations is insufficient. Most nations are not major powers, so considerations of how influence operates for most nations requires a wider view. Long's (2022) categorisation, while designed for small powers, can applied more broadly to include powers of greater or lesser standing including middle powers such as Australia. The conceptual framework (see Table 5, below) includes four characteristics of influence (base, means, amount, and scope) and further develops the basis for analysis by considering each of these characteristics in terms of a state's relationships – both with larger powers (derivative) and with powers of similar stature (collective).

Table 5 Three categories of power (From Tom Long (2022), p.61

	Particular-Intrinsic	Derivative	Collective
Base (source)	Resource inherent to a small state.	Relationship with a great power.	Relationships with other powers.
Means (instrument)	Threat / promise to withhold or grant.	Lobbying, framing, patron alliance, manipulation.	Institutional, ad hoc coalitions.
Amount (extent)	Contextually dependent.	Potentially great.	Depends on coalition.
Scope (range)	Directly related to resource, plus linkages.	Issue specific.	Narrow for ad hoc coalitions, diffuse for institutions.

[4]The classification of major, middle and minor powers is imperfect but useful. The categorization is imprecise, and contextual: New Zealand, for example, could be categorized as a minor power globally, a middle power in the Indo-Pacific, and a major power in the South West Pacific. An indicative example of how Indo-Pacific powers are categorized is provided by the Lowy Institute's Asia Power Index (Patton, Sato, and Lemahieu, 2023).

The base of derivative power is the relationship between a small state and a greater power. The means, amount and scope of power will vary according to the specific influence goal, the degree to which interests are aligned, and the importance of the issue for the greater power (Long, 2022, p. 63). While creating opportunities for amplification of a small states' concerns, derivative power is likely therefore to have a narrow scope, restricted to specific areas of mutual interest, and control over the outcomes of influence efforts are limited.

Collective power is based on various types of relationships with near-symmetrical powers. These relationships can be established and practiced through dedicated regional institutions, through issue-based groupings, and can occur on an ad hoc basis. Acting in concert, smaller powers seek to access larger audiences for their influence efforts, demonstrate greater relevance for shared concerns, and increase the resonance of arguments, especially those centred on morality or survival.

Organising collectively, smaller states attempt to garner enough diplomatic support for their causes to influence greater powers, in which case collective power resembles a more complex version of derivative power. Where there are obvious differences in power or status within the collective, the capacity to act collectively may benefit from arrangements, such as institutionalised modes of cooperative decision-making that reduce both the perception and the practice of power asymmetry.

In sum, four aspects of relationality apply to the conceptualisation of macro influence:

1. Relativity: some nations are not major influences globally, but may be regionally.
2. Networks: the numbers, strength and types of connections contribute to influence.
3. Issues: influence is contingent on the issue in question.
4. Dynamism: influence relations are not fixed; some relationships (on some issues) are more stable than others

A nation's influence is relational, in that it varies depending on the number, strength and type of relationships. Relationships are:

- embedded in complex networks of multiple connections;
- asymmetric and complicated, varying according to issue or context;
- dynamic, although some are more stable than others.

Orders of effects

Conceptualising the effects of influence efforts is, inevitably, both complex and essential. The complications arise for several reasons – only one of which is that actions can have micro, meso and macro effects, which involve various means of measurement, assessment, analysis and evaluation. Here, we focus on three aspects of effects that have clear consequences for the conceptualisation of influence at a macro level: the conceptualisation of targets; of messages, and of impacts.

Targets of influence efforts may be discretely, specifically defined – either key individuals or significant groups – yet the effects of influence efforts are not typically limited to those targets in isolation. Individuals and groups sit within and are constitutive of larger, networked systems of influence, including socio-cultural, economic, and political systems. Effects should therefore be conceptualised at the level of the target/s and of the wider system/s.

Influence effects are the result of influence messages. Messaging, broadly defined, includes deliberate communication efforts but also includes all other activities that will send messages, even where those messages are not the primary motivation of the activity, and even where those messages are subject to multiple interpretation. This is articulated in the United Kingdom Ministry of Defence (2019) Joint Doctrine Note on Strategic Communication (JDN 2/19). This JDN redefines strategic communication from "'advancing national interests by using all Defence means of communication to influence the attitudes and behaviours of people" to "advancing national interests by using Defence as a means of communication to influence the attitudes, beliefs and behaviours of audiences" (3-4, emphasis added).

JDN 2/19 makes explicit the multiple orders of effect that defence actions have:
*Every Defence action, and inaction, has **communicative effect.** Everything we do, or do not do, communicates a message that will be perceived differently by a multitude of target audiences, be they friendly, supportive, neutral, opposing or hostile; both at home and abroad. Differing perceptions of our activities will influence the attitudes and behaviours of those audiences. The military is one of the four levers of UK national power and its use, or non-use, is one of the most powerful forms of messaging available to government. (UK JDN 2/19)*

UK JDN 2/19 lists some of the activities that will "send a message", including:

- the acquisition and use of defence assets;
- the location and types of training exercises;
- support for social causes;
- publication of research and reports, and
- engagement with international partners.

Moreover, UK JDN 2/19 notes that "the messages that is received will vary by audience" (UK MOD, 2019, pp iii – xiii). The implication here is that effects should be conceptualised as potential results of all defence activities, and that these effects will be subject to multiple interpretations. The consequences of this in terms of how indicators of influence are developed are discussed further in the indicators section of the report.In military doctrine, effects-based operations (EBO) have a primary focus on the achievement of the desired end state and are contrasted with approaches that focus

on immediate outcomes of actions. Outside of EBO, effects are typically described in more general terms as being first order (direct, without intervening mechanism between the act and the outcome) and then second and third order effects (sometimes fourth, fifth and further orders are added) as the relationship between the action and the consequence becomes less immediate and less direct, and more diffuse.

The inevitability of second and third order effects, however understood, means that indicators or measures of effect need to take these into account. This means that a wider range of impact measures, a greater number of affected people/groups/institutions/nations, and a wider time frame can and possibly should be considered. This is addressed in the companion report on Influence Indicators.

Influence effects range from the direct and immediate, through the adjacent and persistent, to the systematic, long term and wide-reaching (also known as first, second and third order effects). Messaging, and interpretation of messages, occurs in ways that are unintended, unavoidable, yet predictable. Target audiences and tactical objectives cannot be the only considerations when planning and evaluating influence activities.

National responses to malign influence – resilience and vulnerabilities

A nation's capacity to resist, counter, and otherwise respond to influence is related to its internal characteristics and capabilities, as well as its actions at a macro level. These include public trust in democratic institutions and norms, the strength of civil society, levels of social cohesion, and the health of the information environment. Many of these are (also) meso level factors, and the connections between the macro and meso level are intrinsic to understanding how malign influence occurs and how it can be addressed.

The areas of macro activity related to resilience to malign influence covered in this section are: monitoring, regulation, and institutional and cultural capacity development.

Monitoring
Macro levels of influence resilience include the capacity to identify, through monitoring agencies, four main attributes of malign influence campaigns. Firstly, identification can include the recognition of problematic content, often referred to as narratives, and of the strategies that these content types seek to exploit. This typically takes the form of a characterisation or categorisation of the content in question.

Identification, secondly, can also include measures or indicators of the reach or pervasiveness of the campaign – the size of the audience reached is one form of reach; another is the number and type of platforms such as social media, online news sites (marginal or mainstream), and key individuals such as opinion makers and influential commentators, and ultimately the cross over into formal political discourse as evidenced in, for example, speeches and formal communications by political decision makers, in governments and parliaments or similar.

Thirdly, identification can include efforts at attribution of the source or the accelerant (through targeted and/or paid distribution) of campaign, either to a single actor – foreign or domestic – or a network (loosely or tightly coordinated) and its motivations - paid or voluntary, ideological or commercial or otherwise.

Finally, and most difficult, is the identification of the effects or impacts of malign influence campaigns. This is difficult for numerous reasons, including: the contingent and complex nature of mediated political environments; the heterogeneity of individual's media diets (due to personalisation of online content through recommender algorithms), and the limited access to relevant data. Demonstrating causality is impossible. However, probabilistic estimates and reasonable assumptions can be cautiously inferred. This is necessary, else planning and evaluation is unbounded by analysis.

Regulation
Regulation of influence efforts can take multiple forms, targeting different aspects of governance and political systems. For the purposes of concision, here the regulations are summarised according to whether the influence efforts are targeting individuals, institutions and infrastructure, or the wider public.

Influence efforts that target individuals are exemplified by direct actions to coerce or entice individuals who are positions of power or have access to confidential or classified information. Most nations have various laws that prohibit such activities, the punishments can be severe where a criminal conviction ensues. In cases where criminality or even impropriety is not necessarily occurring, such as in lobbying efforts, regulations can aim for transparency and accountability either to a representative body, such as a parliament, or to a statutory independent investigative agency.

Influence efforts that target institutions, such as universities, unions, industry groups, think tanks, non-government organisations and the like, can face similar regulatory requirements. For example, Australian universities have requirements to safeguard national security interests when engaging in research with foreign partners. Additionally, regulations may monitor and restrict foreign investments and veto foreign companies' activities where these are deemed to pose security risks.

Influence efforts that target the wider population, principally through mediated communication networks including news services and online social networks, can also be met with regulatory efforts by governments. However, this is far from straightforward and varies considerably based on the political

system in question, especially its free speech protections (see O'Hara & Hall, 2021). In more authoritarian systems, governments have greater powers to restrict public speech, and will do so to limit both foreign interference and domestic political opposition using the same or related sets of laws that are ostensibly aimed at protecting trust in political institutions and political stability.

At the other end of the scale are political systems in which free speech is prioritised and self-regulation by industries (such as the news media and technology companies) is given greater emphasis. This is exemplified by the United States, where free market and free speech protections dominate. A pertinent example of these protections in operation is the protection provided to social media platforms via the Communications Decency Act (1996), specifically Section 230 which prohibits treating social media platforms as though they are the publishers of the content which third parties (that is, the users of the site) post, thereby exempting them from most laws that would otherwise apply to harmful content such as defamation laws. (The Securing the Protection of our Enduring and Established Constitutional Heritage Act (2010) (SPEECH Act) protects United States-based companies from defamation penalties incurred outside the United States.)

Between the authoritarian and free market / free speech models, the European Union model seeks to balance the benefits of an open media and communications with protections of individual privacy and a more pre-emptive and interventionist approach to harm prevention.

Institutional and cultural capacity
Macro level aspects of resilience to influence include national institutions, as well as what are referred to here as national cultural characteristics, such as trust and literacy.

Some national institutions that limit the impact of malign foreign influence do so through the preservation of the integrity of political and economic systems. Independent electoral commissions, for example, can act to ensure that elections are fair, and are deemed to be fair, thus increasing trust in electoral processes and the legitimacy of outcomes of these process. This limits the opportunity for foreign influence efforts to either undermine the electoral processes or public faith in the outcome. Similarly, institutions that act transparently to operationalise the laws and regulations mentioned above (such as those regarding corruption or foreign investment) can both limit risks in these areas and preserve trust through accountability, openness, and independence. Nations can enhance their efforts to mitigate malign influence through institutionalised coordination of efforts, and integration of these efforts into a national security strategy. Managing risk of malign economic influence can also be supported through national institutions that support diversification – and, in recent parlance, 'de-risking' (Gewitz, 2023) – of export markets, international supply chains, and sources of foreign investment. The aim in these cases is to enhance economic resilience and economic security.

Programs to develop critical digital literacy among the wider population can also be a means for nations to address concerns about the impact of malign influence operations. Institutional support for efforts that address information disorder (misinformation, disinformation and mal-information) can also include provisions for fact-checking, pre- and de-bunking and the like. Moreover, institutional support for a mainstream press that is professional (that is, required to meet certain standards and is subject to professional oversight), diverse, and independent can also be counted among the ways trust in a mediated information environment can be promoted.

Finally, resilience to influence can include macro-level support for programs that outreach to groups that are either of special interest or have special needs, or both. A ready example is diasporic communities that may have limited literacy in the dominant language/s of the nation, and who may have ongoing significant ties to foreign nations that make them appear a more valuable target for influence efforts.

A nation's capacity to resist, counter, and otherwise respond to influence is a produce of its internal characteristics and capabilities. These include public trust in democratic institutions and norms, the strength of civil society, levels of social cohesion, and the health of the information environment.

Discussion and Implications

Overview and Relevance

This report draws on behavioural and social science theories and models to enhance current comprehension of influence. This knowledge can be applied to the planning, conduct and evaluation of influence operations. Specifically, the report can be used to improve:

- incorporating influence theory and models and indicators into experimentation and war gaming;
- facilitating the planning, implementation, and evaluation of influence campaigns;
- developing sovereign capabilities for influence campaigns;
- directing the development of counter-influence strategies;
- framing training for influence awareness and resilience; and
- enhancing diplomatic engagement.

The analysis of influence advanced in the report is concerned with Australia's national interest but also shared regional security interests as it relates to a peaceful and stable Indo-Pacific, one that is open and inclusive; where sovereignty and the rights of all states are respected; and where the rule of law is upheld. As outlined in Australia's 2023 Defence Strategic Review, diplomatic efforts, regional partnerships, and domestic resilience will be key factors in promoting regional stability and Australia's National Defence. From this perspective, better and more comprehensive awareness of the mechanisms and effects of influence make effective regional partnerships more likely to be realised.

Influence is positioned then as having a dual strategic relevance. It is comprehended as something used by Australia's adversaries to engage in foreign interference. However, for Australia it can also be a constructive basis for building resilience to such acts by safeguarding social cohesion, trust and democratic assuredness.

Major Conclusions

The report outlines insights at the micro, meso and macro levels that can inform the development, management and evaluation of influence efforts. These insights are listed in the Executive Summary. Across the micro, meso and macro chapters of the Report, five major conclusions have been made regarding how influence strategies should be shaped or responded to:

1. The role of advanced target audience analysis needs to be emphasised

Influence is conditioned upon comprehending with specificity who is encountering the message, with what worldview, and via what source/medium. Within any advanced diverse society there exist group memberships that may be in tension across the local community as well as civic, political, cultural, and national spheres. Grey zone tactics feed off the increasing extent and nature of the divisions between these groups and spheres, with fragmentation of traditional group identifiers and a waning of associated solidarity mechanisms in contemporary liberal democratic societies. Influence that seeks to further entrench division will often identify and target these fault lines, if not seek to create such fault lines where they did not exist.

In this fragmented environment, counter influence campaigns that seek to build positive effects need to be undertaken in highly targeted ways with specific outcomes in mind. While influence is an outside threat, attempts that appear to come from "the outside" will mostly be less influential than messages that appear to originate from within the group. Similarly, influence attempts that seemingly originate from within the group will often fail if they contravene or are otherwise inconsistent with the key norms, values and beliefs that are defining of the group ("who we are"). Rather than conceptualising influence as a grand project directed towards societies at large, influence attempts are more likely to be successful if implemented in niche ways, with attention being on aggregated and cumulative effects. (This is discussed further in the companion 'Influence Indicators' report.)

A related implication is that influence campaign strategies will rarely attain success unless they are tailored to the local cultural contexts of the society in which the audiences reside. Appreciation of cultural context is, in many regions, not well developed. Research into nations that have not been of major economic importance is currently not at a level required to inform the design of targeted influence campaigns. Such empirical knowledge is significant; what works in one instance will not necessarily work in others. Comprehending cross-cultural differences and appreciating local cultural context, including how societies are constituted by various segments and divisions, is a critical dimension of designing influence strategies and campaigns.

2. Empirical accounting for intervening variables

Influence is often comprehended in simple, linear ways that are inadequate for comprehending how these processes operate in the complex real world. This is often the case due to a lack of account for intervening variables that are a prominent feature of audience processes related to interpretation and meaning making. Such variables include many of the elements of social relationships and information environments that are discussed in this report.

One of the risks of such linear thinking includes influence campaigns appearing to their producers as being meaningful and consequential while appearing to target audiences as largely transactional and/or inconsequential, which promote outcomes that are contrary to those intended.

For this reason, influence campaigns not only need to be designed in targeted ways but appropriate methods should be used to monitor and measure their effects. This assessment is critically important as not only can miscomprehension of influence result in poor strategic and social policy but a poorly designed influence campaign looking to build societal resilience may actually promote societal disorder and undermine public trust.

Approaches to address these concerns are the subject of the companion report on influence indicators.

3. Promoting the resilience of societal structures

Existing analyses of influence, especially recent reports, focus on online behaviour. Although the online world is a key enabler of mass influence, it is also the case that influence achieves its effects through aspects of people's identities and interactions that also relate to their "offline" world. Resilience to undesirable influence can involve targeted educational initiatives such as those that aim to increase media literacy in the population or programs that seek to counter the spread of radicalisation and growth of political extremism and violence. However, social structural issues are significant when addressing vulnerabilities to malign influence. Many of the structural factors that play a preventative role to malign influence have been weakened by neoliberal economic and social policies. While general notions of social inequality are typically discussed in the public sphere as enablers of extremism, this report focuses on threats more directly involved in the interpretive acts associated with influence such as failures to protect quality journalism, challenges to the autonomy of civil society groups from other spheres of power, and the benefits derived from an inclusive national identity.

Addressing such structural factors is significant as the security threat within democracies comes from both those traditionally conceived as being marginalised and those who are part of the dominant culture. This includes approaches to professionals, such as academics, judges, and journalists, at levels not seen since the Cold War.

4. Influence and national distinctiveness

The growing security literature on influence is overwhelmingly orientated to its exertion by Great Powers. More understanding of influence is needed in relation to a range of nations and societies, and the distinctive role and strategies they can employ in resisting and exerting influence. For Australia, this involves better comprehending distinctive issues of national solidarity and the various cultures and politics of the Indo-Pacific as it relates to influence, including Australia's reputation and ties as a distinct Middle Power. While US and European research on influence strategies and campaigns has some relevance to understanding the threats and opportunities in the Australian context, the different geo-political and strategic context needs to be considered. Similarly, a view of influence that is limited to the return of Great Power competition can fail to appreciate the ways in which influence attempts occur in ways that involve various nations, with influence attempts not just stemming from those with vast economic power. Bipolarity in viewing influence can also blind us to comprehending that strategic competition can also exist between nations within security alliances.

5. Influence as multidimensional and cumulative

The report explores influence and demonstrates its dynamics across three levels of analysis: micro, meso, and macro. This approach illustrates how influence has different dimensions, involving cognitive, emotional, and behavioural variables that are frequently not considered simultaneously, if at all, when influence is analysed from one level. The overriding recommendation is that it is strategically beneficial for influence to be defined and operationalised as being multidimensional.

This multidimensional understanding of influence moves beyond something that is "done to" or "done by" people, with the report arguing that influence is best strategically understood as "working through" people. From this perspective, influence has cumulative effects, occurring through interactions between the micro, meso and macro levels. To advance this cumulative understanding of influence we need to move beyond a comprehension of influence that is bound to any one effort or campaign. Rather, empirical indicators that are specific to measuring and monitoring influence at different levels are required to comprehend how influence attempts have multiple effects, both immediate but also cascading and enduring, considering both current and previous influence attempts, as well as other from sources of social and political change that shape social structure.

At the micro level, this cumulative effort relates to the ways in which primary psychological needs of mastery, relatedness, and autonomy, which are important for psychological wellbeing and motivation, are being met. This framework helps to explain who will be more influential, when and how as well as why some people more than others will seek out certain information. The concern of the meso level is not foundational

Discussion and Implications

needs but how rapid changes to civil identification and communication practices, that underpin a sense of community, have left people more open to malign influence. The macro also accounts for cumulative dimensions of influence by considering the ways in which various forms of diplomacy, partnerships, and international agreements, as well as past covert and non-attributable efforts to deceive and coerce, shape the ability of nations to be persuasive.

Influence as it relates to security and grey zone tactics are not reducible to any one set of actions or behaviours. Rather influence simultaneously involves a combination of micro, meso and macro factors and how they interact with each other. As such influence is best understood as a process – or series of processes – through which the environment, ranging from personal interactions, groups and (inter)national institutions, is subtly shaped in ways that, at a cumulative and system level, achieve more than the sum of their individual parts. Although the three levels have been described above as separate it should also be understood that there exists considerable overlap and interconnection. Similarly, while disciplinary tradition will see micro, meso and macro analysis occur separately, in the development of policy and practice relating to influence campaigns it is important that all three levels are simultaneously considered.

Appendices

Appendix A: Types of grey zone influence activities

This section outlines some types and examples of influence activities at various levels, from Grand Strategy and Nation Branding (long term and foundational) to strategic campaigns and operations (which include a series of actions involving a number of actors) and tactical and micro-targeted (shorter-term and focussed).

It is important to warn against conceptually aligning the strategic with only the macro, the operational only with the meso, or the tactical with only the micro. Instead, the emphasis ought to be on the integration between the strategic, operational and tactical aspects of influence; how these levels are intrinsically combined in influence networks or systems.

Additionally, influence can have malign intent, benign intent, or it can have benign intents for some while being indifferent to or hostile towards others.

Examples below illustrate the variety of levels and intentions of influence. It is imperative to underline that these types are not categorically distinct or mutually exclusive. As the examples suggest, there are blurred lines where intentions are unclear or mixed. Such blurriness is unsurprising, given that ambiguity (or 'greyness') is a defining element of the complex and uncertain contemporary strategic environment.

In support of grand strategy

Influence activities in support of general foreign policy aims are foundational to a nation's outlook and its interests. They involve many aspects of government, and non-government sectors like civil society and the private sector, engaging many dimensions of national power including military, diplomatic, economic, and informational and integrating them into 'statecraft' – the aligned pursuit of national interests.

In its more benign manifestations, these dimensions of national power may be deployed to project an overall image that is favourable, even flattering. Typically, activities aimed at achieving such positive images are referred to as Nation Branding, and the type of influence aimed for is characterised, initially in the sunnier climes of the immediate post-Cold War period, by Joseph Nye (1990), as soft power – the power to persuade through attractive and positive examples, contrasted with hard power – the power to influence through force. Soft power has been compared with more malign forms of influence, referred to as sharp power (Walker, 2018). Nye himself updated his view to account for post-post-cold war realities to advocate a combination of hard and soft power into 'smart power' (Nye, 2009).

Regardless, of the type of power involved, the aim is to identify and pursue national interests. At its most ambitious, this may be referred to as Grand Strategy. Major powers, and those who seek to be great powers, may aim to shape geopolitics in significant ways. The Cold War was characterised by such efforts; more recently, great power geopolitics is resembling earlier struggles. While most nations are not major powers, all nations may seek to shape their relations with other nations, especially with major powers and with those they are most closely engaged with or impacted by. These foreign policy goals are typically long-standing, although they will change due to change in domestic political circumstances or strategic developments. For example, with the collapse of the Soviet Union, for some time Russian foreign policy was based on accommodation and engagement with the West, especially integration with Europe. In 1996, then Foreign Minister Yevgeny Primakov announced a major shift in Russian foreign policy. The Primakov doctrine, which has shaped Russian policy ever since, emphasised the break: "Russia left the path of our Western partners … and embarked on a track of our own" (Rumer, 2019, p.4). The general aims of this policy include pursuit of a multipolar world and hence the end of United States' unilateral power; Russian primacy in post-Soviet space; opposition to NATO expansion, and partnership with China. This general policy aim is supported by specific aims via campaigns, such as the Internet Research Agency (Ebbott, et al., 2021) and information operations elsewhere, as well as by ongoing actions in Ukraine encompassing hybrid warfare (kinetic warfare in all domains, including cyber, as well as information operations.)

Some strategic shifts can be profound – such as the shift from militant imperialism in the name of a 'Greater Asian Co-Prosperity Sphere' to an international policy that eschews military force outside of national defence, enshrined in Article 9 of the Japanese Constitution at the insistence of t he United States occupying authority in the aftermath of their defeat in their World War 2 surrender. Others can be more subtle, such as to-and-fro in Japanese foreign policy between Prime Minister Shinzo Abe's 'values-oriented diplomacy', which was introduced during his first period in office in 2006-7, was resurrected at his return to the leadership in 2012, and remains influential, and Prime Minister Yasuo Fukuda's 'synergy diplomacy', which replaced it in the intervening years. These are not mere branding exercises; they set the priorities for international relations' activities at various levels. Abe's values-oriented diplomacy includes support for the principles of the global rules-based order, the development of the Quad as a security partnership, and the regional concept of the ' Indo-Pacific'.

As is typical of middle powers, Australia's foreign policy is shaped by its relationships, its circumstances and position within the international system, as well as by its capacities and decisions. Though settings and situations shift, Australian foreign policy, as Allen Gyngell (2017) notes, has since the Second World War rested on three main pillars. First, the alliance with the United States is Australia's main security guarantee. Second, engagement via multilateral institutions is a means to affect international affairs in its own and in global interests. The third is engagement with the region, through

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trade (especially with East Asia: China, Japan, South Korea), development and humanitarian assistance (especially in the Pacific, but also on occasion with significance in South East Asia, such as Indonesia after the 2004 Tsunami) as well as through diplomatic efforts, population movements, and cultural exchanges. These pillars can be in tension, for example when security and economic relationships are misaligned. They can also be mutually reinforcing, such as when Australia was instrumental in supporting multilateral efforts towards reconciliation and political stability in Cambodia.

In pursuit of specific foreign policy goals
Australia's contribution to Cambodian peace, reconciliation and development via the Paris Peace Accords are an example of how general foreign policy goals (multilateralism, and regional engagement) are supported by a specific foreign policy campaigns and activities (in this case, diplomatic activism, support for the Paris Peace Accords, and provision of security and constabulary assistance during the subsequent elections).

Other examples may be more self-interested yet remain benign. Nation Branding and soft power activities typically fall into this category. Public diplomacy efforts, promotion of national export industries, marketing campaigns touting a nation as a destination for tourism, education, or migration, and the hosting of international sporting, trade and diplomatic events are examples of benignly competitive efforts in support of nation branding.

Sharp power, however, involves operations in pursuit of specific, often identifiable, or inferred, foreign policy goals in ways that interfere with the sovereignty, territorial integrity, domestic politics or social cohesion of another nation. Such operations may be in support of kinetic and cyber warfare, either overtly or remaining covert and deniable -- at least below the threshold that is likely to provoke kinetic military responses. The most noted recent example of this type of influence campaign is the Russian attempts at foreign interference in the 2016 United States Presidential election, conducted by the Internet Research Agency, operating out of St Petersburg under the direction of the Russian Government.

Russian efforts at malign foreign interference align closely with its grand strategy mentioned above. Its efforts at interfering in democratic processes aim to undermine United States primacy through the election of candidates more favourable to Russia's interests, and through destabilising democracy and undermining trust in political institutions. Similar activities in NATO countries additionally seek to undermine support for pro-Europe (and by proxy pro-NATO) policies by promoting nativist populism.

More directly, influence operations in Georgia, Ukraine, Belarus and the Baltic states support their strategic goal of primacy in these post-Soviet nations – although these efforts have been more successful in some places (namely, Belarus) than in others.

Some operations may target a single event, such as an election or referendum. Others are ongoing yet similarly aim to influence domestic political outcomes. Harold, Beauchamp-Mustafaga and Hornung (2021), for example, categorise three types of interference in Taiwan involving information campaigns: ongoing efforts aimed at deepening division and depressing confidence in democracy; more discrete and time-bounded efforts to interrupt a scheduled event like an election or a visit by a head of state, and opportunistic attacks aimed at amplifying an adversary's misstep.

Whether acting with malign or benign intent, influence efforts are – in theory – aligned with a nation's overall grand strategic goals. In practice, this is a significant challenge and requires coordination between various arms of government and integration of influence activities across all dimensions of national power.

Ideally, efforts of civil society and the private sector would also support national goals. This is difficult for centralised governments who exercise closer control over businesses and wider society; it is more difficult for liberal democracies.

Unofficial but aligned with foreign policy
The challenge of coordination and integration is made more problematic by unofficial and unauthorised efforts undertaken by loosely organised groups bound by shared identities, values, or objectives. These groups can be highly visible and very active, if unreliable, even problematic; their activities have become more possible and more prevalent with the popularisation of the internet 2.0 (the interactive internet in which individual users can create, curate, and distribute content).

Influence operations not officially endorsed by governments may be aligned with foreign policy and therefor supported informally, such as by the relaxation of restrictions on accessing international social media sites (Harold, Beachamp-Mustafaga & Hornung, 2021). These unauthorised efforts may include organised activities including propaganda networks – groups that engage in deliberate efforts to both shape perceptions and actions through targeted messaging, and to co-opt their targets into actively spread these messages via their own networks (Wanless & Berk, 2021). This increases the reach of the messages and adds a level of personal endorsement which may result in the message being more favourably received. These types of campaigns involve groups ranging from the more institutionalised (such as political and civil organisations and religious groups) through to the less formally-constituted (such as ethno-nationalist networks) and even to loosely coordinated online networked publics (sometimes called 'affinity networks') of individuals connected via shared interests, ideologies and outlooks. Such groups and their activities are difficult to control, even by the members themselves, and may exceed what is considered appropriate and undermine influence efforts elsewhere.

An illustrative example occurred from January 2016, when moderators of the discussion forum Baidu Dibu urged over 20 million users to target the Facebook pages of the Taiwanese presidential candidate Tsai Ing-Wen and Taiwan media outlet Apple Daily, and other supporters of Taiwanese independence. The Dibu Expedition struck a chord, trending on social media platforms such as WeChat, QQ and Weibo, where it garnered more than 610 million views (Lui, 2019). This combination of fandom, nationalism and digital communication strategies and modalities (including memetic imagery, shared shibboleths and argots, irony, and performative outrage) constitute a form of transnational discourse that at least impacts on diplomatic relations, and may be incorporated into national strategic discourses.

Associated with domestic politics

Influence efforts also includes campaigns, or loosely organised networked online activities, associated with domestic politics. These are plentiful, and common. They are a routine characteristic of political communication in contemporary democracies and associated with a great range of causes and groups. In many ways, current influence efforts are manifestations of the political public sphere and civil society's engagement with institutional government that has evolved over centuries.

Influence efforts, especially those associated with social media, have also been associated with new forms of political activism in politically repressive societies, and responses by political elites in those societies against activist groups and (other) political opponents. A prime example is the 2011 Arab Spring. In its early phases, activist networks used social media platforms, especially Facebook, Twitter and YouTube, to share content, organise, motivate, publicise events, and shape narratives in order to place political pressure on repressive regimes. As events progressed, these same social media platforms became used by these same repressive regimes and their supporters to identify and target activists. One illustrative experience is that of key Egyptian activist (and former Google employee) Wael Ghonim, who was an early advocate for social media as a vector for popular democratic uprising, what he called 'Revolution 2.0' (2012), and who soon thereafter became a vocal critic of Facebook's laissez faire response to the use of its platform as a vector for disinformation campaigns targeting pro-democracy activists.

Domestic influence campaigns can thus range from benign – the cut and thrust of robust debate that characterises democratic politics -- to malign, based on deception or base manipulation, or used as tools for surveillance and repression. The distinction between these is sometimes moot, based upon political preferences and attitudes towards free speech and the responsibility for truth and trust in political campaigning.
In other cases, it is less equivocal: the most notorious example to date involving social media is probably the case against Facebook (through its parent company Meta) for its role in facilitating genocide by the Myanmar regime against the Rohingya people.

Domestic influence campaigns are significant for understanding foreign influence efforts in a number of ways. Domestic campaigns targeting identity-based or issue-oriented affinity networks, such as those aligned around controversial and socially divisive concerns, create or highlight how such groups can be exploited by outside actors. Foreign malign interference operations can, and have, infiltrated such groups through adopting false online identities and impersonating normative group behaviours, seeking to influence group attitudes and behaviours.

Also, foreign actors may engage with the same commercial third-party actors used by domestic political actors, such as social media platforms, advertising and political marketing companies, including so-called 'Black Op' PR agencies specialising in fake news production (including through automated content creation tools using artificial intelligence), troll and sock puppet accounts, hashtag targeting and other tools of disinformation and political manipulation (Ong & Cabañes, 2018).

Appendix B: From propaganda to persuasion, from mass to social influence

Though centuries of transformation, in important ways much has remained unchanged regarding the role of propaganda, even as media and communications technologies have advanced. For the purposes of understanding the present set of techno-social conditions, the developments of the 20th century merit some attention. Ethno-nationalism and new political ideologies replaced or absorbed religion as the main driver of propaganda narratives, but the requirements to morally justify war remained.

The need to motivate entire populations increased as warfare extended from the battlefield to the whole of society, especially with the advent of the long-range bombers targeting cities, industries, infrastructures, and civilian populations with destructive force. The means to motivate societies (and undermine opponents) also increased its range and speed, firstly through the use of aircraft to distribute printed material, and then through the inventions of the radio, then the television, the satellite, the internet, and the mobile smartphone – making communication ubiquitous, instantaneous, and personal.

The methods of motivation also developed through the rise of the advertising and public relations industries and growing scholarly communities examining the psychological effects of mass communication on mass populations. Early media scholar Harold Lasswell (1927) for example defined his research focus as "the management of collective attitudes by the manipulation of significant symbols" (p. 627). The early assumptions were that publics could be directly influenced,

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en masse, through persuasive messaging, and that this could be of benefit to society as a means to unify and educate mass populations, for the social good.

Attitudes towards such mass influence efforts changed significantly through the interwar years, and propaganda became a pejorative term, for a variety of reasons. The deployment of graphic 'atrocity stories' by the patriotic British press against the German adversaries, later found to be exaggerated, resulted in a generational slaughter and subsequent distrust of propaganda. Adolf Hitler pointed to the success of British propaganda and, with Goebbels, based the Nazi Party's propaganda efforts in part on it: in Mein Kampf, he wrote "Propaganda, propaganda, propaganda. All that matters is propaganda" (cited in Taylor, 2003, p. 241).

Propaganda efforts accelerated during World War Two, with many tactics and narratives emerging that may resonate today, such as: the use by Japan of historical experiences of European colonialism in Asia to promote a negative view of interventions by non-Asians; the claims by Germany to be restoring their 'rightful' place in the world, and that German actions were a 'defensive war' against aggressive attempts to encircle them, and efforts to promote discord between the Allies through narratives that depicted the British as governed by corrupt elites who would, for example, 'fight to the last Frenchman' (cited in Taylor, 2003, p.45).

In the post-war period, propaganda was further discredited as it was blamed for the popular support for the German and Japanese regimes. Campaigns against propaganda were required to redeem these nations and bring them (back) into the fold. Propaganda became associated with totalitarian regimes' activities aimed at limiting the freedoms of their citizens and contrasted with the free speech and public debate celebrated in democracies.

In the decades that followed, three further developments shaped attitudes toward propaganda.

First, the rise of mass advertising as a driver of consumer culture, especially in the United States, prompted concerns about the role of 'hidden persuaders' (Packard, 1957) targeting ordinary people and everyday life:

The use of mass psychosis to guide campaigns of persuasion has become the basis of a multimillion-dollar industry. Professional persuaders have seized upon it in their groping for more effective ways to sell us their wares – whether products, ideas, attitudes, candidates, goals, or states of mind (3).

Second, the experience of the Vietnam War resulted in two lessons: for governments, that coverage of conflict needed to be controlled lest political support diminish (which it did); for citizens, that robust investigative journalism is a requirement for holding governments to account (which it was).

These two developments broadened the concept of propaganda beyond totalitarian regimes, to include the use of media and communications in democratic, free market societies to shape coverage, promote narratives, frame debates and undermine opponents.

A third development provided an alternative, and much less bleak, view of how influence operates by challenging the basic idea that people are easily and directly influenced by propaganda, advertising and the like. Research in the fields of media and communication studies demonstrated instead that people actively engaged with the messages they received, interpreting and interrogating them in complex ways that deny easy analysis.

This 'limited effects' theory was summed up as "Some kinds of communication on some kinds of issues, brought to the attention of some kinds of people, under some kinds of conditions, have some kinds of effect" (Berelson, 1959, p. 1). The concern of media effects researchers then and since, and one of the underlying premises of this report, is that it is difficult, but necessary and to some degree possible, to identify and analyse the 'some kinds' of communication, of issues, of people, of conditions.

More recently, contemporary media and communications technology has shifted from the centralised, mass broadcast model to the distributed, digital network formed from the combination of the internet, the World Wide Web, the platforms (such as social media sites), the devices people use, and people themselves.

This techno-social system has several characteristics that distinguish it from earlier times. One is the capability for any online user to create, curate, engage with and distribute content. The large number of active users producing and circulating content results in the added difficulty of monitoring, moderation, and regulation.

In the United States, regulation is further limited by free speech protections including the 1996 Communications Decency Act (Kosseff, 2019), although these protections are challenged elsewhere (O'Hara & Hall, 2021). Together, these characteristics result in content that is created outside of the typical norms and regulations governing the professional knowledge industries such as journalism, academia, government bodies, and other institutions such as think tanks, commercial research organisations and non-government organisations. The consequence is that content aimed at influence can be created anywhere, by anyone. Attribution is often difficult (without some specialised training) and uncertain, and impersonation is easy.

In addition to increases in unregulated content, the new media system is characterised by increases in connectivity. Where broadcast models of communication are essential from one point of origin (a television channel, a radio station), internet-based communication is a large, complex and

dynamic network comprised of unevenly grouped clusters of connections. It is a complex adaptive system of interdependent actors, and as such resists forms of centralised control (Bousquet, 2008).

A further important characteristic of contemporary digital networks is their capacity to target specific people, and groups, made possible using digital marketing methods. Audiences – or as they are more typically nowadays called, 'users' or 'publics' – are identified and targeting for messaging that can be tailored to them based on their identity, their preferences, their affiliations and other attributes. Appendix D goes into further detail about how this occurs.

A consequence for influence efforts is that it has become possible to target those individuals and groups based upon, and using messages that align with, pre-existing values, interests, world views and social identities. This process, known as surveillance capitalism (Zuboff, 2018) or platform capitalism (Smicek, 2016) combines the acquisition, accumulation and analysis of a user's personalised data with the capacity to target that user online via programmatic advertising, tailored search results, or curated content on social media feeds. This is done using a range of algorithms and databases that are confidential, highly prized assets.
The promise of such digital marketing methods is to get the right message to the right person at the right time, to make influence bespoke. Although, as Aral (2021) notes, there is considerable conjecture about how successful digital marketers are at keeping such a promise.

In sum, these characteristics of contemporary information environments result in information excess and attention scarcity, such that the information economy has been renamed, by Davenport and Beck (2001), the 'attention economy'.

The consequences include on one hand, the capacity for people to choose which information, and sources, to pay attention to. This is supported by, and contributes to, a greater percentage of the population now being open to change, contesting accepted beliefs and questioning the authority of experts and institutions.

On the other hand, the logic of attention economy supports the targeting of people based upon what they are mostly likely to pay attention to, and ideally to engage with and act upon.

Appendix C: Online social network influence operations: typical campaign elements

Although variations are evident, and although historical data is limited, and although campaign tactics are evolving and dynamic, it is possible to suggest a broadly applicable set of elements that combine to form the basis of online and social media influence campaigns. These are: research, profiling, predicting, targeting (people, message, timing), persona creation, connection, communication, influencing, reviewing.

What follows here is an ideal type of such a campaign, comprised of these constituent elements and presented as a staged order of activities. Actual, empirical case studies of campaigns may vary in that some elements are minimised, or not observable as the data is not available, or are de-prioritised, or that the order of activities is scrambled, the events are repeated in an iterative process, and so on. In short, campaigns can be considerably more disordered than this idealised outline.

The first stage involves research: the gathering of data on target individuals and groups for the purpose of understanding them psychologically (their identities, values, vulnerabilities, desires) and socially (their connections, affinities, affiliations). This is analogous to Target Audience Analysis.

Research at scale has a long history in the fields of marketing and advertising, typically undertaken through surveys, interviews, focus groups and in situ observations. Referred to as 'advertising engineering', this included recommendations that families should be studied weekly for years (Root & Welch, 1948). In 1980s-90s hacking cultures, research included 'trashing' – literally going through the garbage outside the offices of, for example, phone companies to find discarded information (old manuals, carbon papers with credit card details, scrap paper with log ins or passwords) that they could put to use to penetrate the system (Gehl & Lawson, 2022).

Contemporary, digitalised forms of research include versions of these earlier practices. Hackers search emails and databases. Online surveys, forms, and applications such as quizzes and games are all used by digital marketing agencies to gather data. Digital media corporations store the digital traces of activities undertaken online or using digital devices including web searches, commercial transactions, locations and movements, photographs, social media engagements, fitness data like heart rates and oxygen levels, and so on.

Subsequent stages – profiling, prediction and targeting – follow research. Data, accumulated at scale into identifiable databases, are used to profile individuals and create what Shoshana Zuboff (2019) refers to as 'prediction products' – calculations used to target advertising at the people most likely to be persuaded, using the messaging most likely to be persuasive, at the optimum time and via the optimum communications channel. This is the promise and premise of the digital advertising industry – referred to as surveillance capitalism (Crain, 2021; Doctorow, 2020; Zuboff, 2019) and platform capitalism (Srnicek, 2017).

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The same underlying principle informs the targeting of individuals and groups and the shaping of messages used in online influence campaigns. Additionally, profiling can be used to develop personas and create online profiles and social media pages and groups for the purposes of group identification with the targets.

The advantages of the creation of personas that appeal to group-based identification are twofold. First, appearing to share the group identities, values and motivations as the intended targets increases the likelihood that the messengers will be trusted as reliable and relatable sources of information and opinion, and that messages will be given attention and positive consideration. This basic premise also holds true when the messenger is presented as having expert opinion based on specialised knowledge as long as this expertise appears to have the interests of the targeted audience at heart, and that it aligns with the targets' aforementioned identities, values and motivations. This is a long-held assumption of influence campaigns, including those that construct deceptive personas, groups, and organisations: an aspect of the public relations industry that has been decried as unethically deceitful and manipulative in seminal texts such as The Hidden Persuaders (Packard, 1957), Toxic Sludge is Good for You (Stauber & Rampton, 1995) and The Merchants of Doubt (Oreskes & Conway, 2012).

The second advantage of group-based identification is more closely aligned to the structure and function of online social networks, based on the notion that individuals often connect with like-minded others in 'social selection networks' based on 'homophily' – shared interests, values and worldviews (Aral, 2020; Prell, 2012) – known also as 'affinity networks' (O'Connor and Weatherall, 2019; Gehl and Lawson, 2022). Thus, by appearing to share identities, values and motivations, it becomes possible to create or join online forums, groups and the like where target communities gather and socialise.

In short, performing an online persona generates opportunities for connection via online networks to online social groups, and this connection creates the opportunity for successful communication with these groups, based on shared group interests, values, and worldviews, resulting in the desired influence effects.

Homophilous groups are particularly important for understanding how online influence networks operate. Homophily, as Prell (2012) outlines, occurs in two ways. One is dependent on the organisational settings and focus: actors will be drawn to such organisations and seek membership of it based on those settings and focus. Typical examples include sporting clubs, formal religious organisations like churches, mosques and temples, political organisations and organised social activism like non-government organisations. The other type of homophily arises out of similarity without formal organisation, based on shared backgrounds such as age, education, ethnicity, family ties, cultural identities and the like. Social media networks provide opportunities for both kinds of homophily to occur: organisations can create groups which members can join; recommendation algorithms suggest 'friends' based on shared interests, and – principally – shared connections. These friend-recommendation algorithms are a form of 'induced homophily', based on triadic closure – the connection of two people who have a mutual strong relationship with a third person (Aral, 2020; Asikainen et al., 2020; Kossinets & Watts, 2009). They are one of the principle means by which social media platforms seek to create connections between users and encourage ongoing engagement on the platform.

There is considerable evidence suggesting that these algorithms are successful in creating meaningful connections: since about 2013, for example, romantic relationships formed from connections recommended by algorithms have surpassed those arising out of introductions by friend and family (Rosenfeld, et al., 2019). Moreover, homophily in online networks appears to be quite strong. When based on ideology, ethnicity, opinions, gender, age, behaviours and country of origin it appears at times to be stronger than offline networks (Aral, 2020; Wimmer & Lewis, 2010).

The role of these selection networks, self-organised groups sharing strong ideational bonds based on expressed beliefs and observed behaviours, and how they can become influence networks, shaping individual opinions within the group as members are influenced by group attitudinal and behavioural norms, are crucial for understanding online influence campaigns.

O'Connor and Weatherall (2019) for example, outline how this penchant for agreement within selection networks, including specialist expert groups such as those compromised of members of a scientific community, can lead to conformity of beliefs within that group and polarisation between groups with opposing views. This aligns with social psychological concepts outlined in the micro section of this report.

Along these lines, Jeffrey's rule (O'Connor & Weatherall, 2019) suggests that the relationship between individuals affects the credence one gives to information, even within scientific communities where evidence is ostensibly considered rationally, or at least free from biases based on interpersonal relationships.

Jeffrey's rule posits that beliefs depend on an individual's degree of (un)certainty, and is thus subject to motivated reasoning, especially confirmation bias, resulting in information from those with whom one has strong ties, such as from within a selection network, is more influential than that from elsewhere. This can, at scale and over time, lead to strongly held beliefs becoming more entrenched within these groups. Some extreme versions of this process develop into manias, what Bernstein (2021) refers to as the delusions of crowds.

[The alternative, wherein less connectivity and communication (temporarily), and more diversity, within groups, can improve reasoning and result in more scientifically accurate results, is known as the 'Zollman effect' (O'Connor & Weatherall,

2019, p. 61). This aligns with the principles of the 'wisdom of crowds' (Surowiecki, 2004) which specifies the conditions required for such wisdom: "independent individual analysis, diversity of individual experience and expertise, and an effective method for individuals to aggregate their opinions" (Bernstein, 2021).

The notion that trust, based as shared social identity, has a pivotal role in shaping influence is prevalent in strategic communications theory and public relations practice. The use of 'third-party advocates', in which an advocate with a pre-existing standing and a favourable reputation in a community is deployed to endorse a group's position or product, is a common tactic in commercial marketing and political campaigns (such as candidate endorsements). Similarly, trust based on shared membership of and participation in affinity networks online can be the basis for effective persuasion.

As O'Connor and Weatherall neatly summarise: "one way to influence the opinions of members of a group is to find someone who already agrees with them on other topics and have that person share evidence that supports your preferred position (138, original emphasis).

Two examples – the first unsuccessful, the second, apparently more successful – serve to illustrate the point.

In the first, pro-democracy protests in Hong Kong were subject to an online campaign which utilised a pre-existing marketing spam network comprised of Twitter accounts that had previously tweeted content in a variety of languages and on a range of topics, "from British Football to Indonesian tech support, Korean Boy Bands and pornography" (Uren, Thomas & Wallis, 2019, p.6). Although this ensured that the content reached a large potential audience, there was no evidence that this audience was interested in (or in many cases, one suspects, able to understand) the content, as the content did not come from a recognisable, let alone trusted, source. In other words, the "accounts did not attempt to behave in ways that would have integrated them into – and positioned them to influence – online communities" (p.4).

The second, much more widely documented, example is the Russian Internet Research Agency (IRA), especially its efforts to affect the 2016 Presidential election campaign in the United States (see, inter alia, Dawson & Innes, 2019; Gehl & Lawson, 2022; Howard et al, 2018; Jamieson, 2018; Jankowicz, 2020). One of the defining characteristics of the IRA's campaign was the use of multiple false online identities through which they were able to infiltrate, or to instigate and develop, social media groups based on existent communities of interest. Using personas, IRA agents developed relationships with American citizens based on apparent, but confected, homophily. Once these relationships were developed, a process taking months or years, based on shared views about, for example, gun control, race relations, immigration, LGBTI rights, or even mundane localised community matters, IRA agents would 'narrative shift', "from banal to pro-Russian views but also switched abruptly between different political positions according to current Russian operational priorities, or even just to create confusion" (Dawson & Innes, 2019, 250).

Appendix D: Discussion of select key terms

In this section, select key terms relating to social influence are discussed regarding their common usages, which vary. Ambiguous, imprecise and inconsistent definitions are a common feature of many of these key terms as they appear in research and in defence documents. This is a problem without clear or easy solution.

Rather than propose yet another set of definitions, this report offers some contextual commentary on these terms to illuminate some of their nuances and variations.

Influence, Interference, and Propaganda
Variations of the use of the term influence occur based on
(1) which elements the term is used to describe and
(2) the malign or benign intentions of the influence actors.

Regarding the first, definitions of influence can refer to three main elements. They can denote characteristics or capabilities (one has influence, or a 'sphere of influence'); actions or efforts (influence operations, campaigns, and similar attempts to influence); or the effect/s (the change in attitude, behaviour). All these elements are discussed in the report as they are all relevant and are not mutually exclusive.

While it is possible to use influence to mean any or all these three elements, this can lead to imprecision and therefore confusion in practice.

The second variation in use regards influence as being either malign, or benign, or neutral. These are mutually exclusive definitions: influence cannot be both benign and malign. If it is associated with manipulation, misinformation or coercion, influence will be seen as a pejorative term describing undesirable, even hostile actions.

In the literature, it is common to see influence operations used to describe activities (more than actors or effects) that have malign intent or which target opponents.

The RAND Corporation for example defines influence operations as "the collection of tactical information about an adversary as well as the dissemination of propaganda in pursuit of a competitive advantage over an opponent" (RAND, n.d.).

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NATO's Strategic Communications Centre of Excellence has offered a definition of an Information Influence Operations as "the organized attempt to achieve a specific effect among a target audience, often using illegitimate and manipulative behaviour … one or more actors have planned and conducted an operation that serves the interest of, for example, a hostile state" (Pamment & Smith, 2022, p.7).

The Carnegie Endowment for International Peace similarly refers to influence operations as 'organized attempts to achieve a specific effect among a target audience" but includes a wider range of actors and less hostility: "a variety of actors—ranging from advertisers to activists to opportunists—employ a diverse set of tactics, techniques, and procedures to affect the decision making, beliefs, and opinions of a target audience" (Thomas, Thompson & Wanless, 2020, p.1).

Some definitions of 'legitimate' influence refer to it in contrast with interference. For example, in his introduction to the National Security Legislation Amendment (Espionage and Foreign Interference) Bill 2017, then Australian Prime Minister Malcolm Turnbull outlined the legislation's focus on "activities that are in any way covert, coercive or corrupt. That is the line that separates legitimate influence from unacceptable interference." (Turnbull, 2017, para 9).

Nevertheless, there are indications that the term is becoming more pejorative in its connotations. A RAND report, for example, notes that many "view influence pejoratively, equating it with manipulation, disinformation, or propaganda" (Paul et al., 2023, p. 1). These negative connotations are likely reasons for other terms, such as strategic communications (see below) or engagement, to sometimes be preferred, although these terms are, similar to influence, problematically imprecise.

Grey zone and hybrid warfare

The grey zone is typically understood to refer to activities operating "beyond those associated with routine statecraft and below means associated with direct military conflict between rivals" (Hicks and Friend, 2019, p.4). There are 'shades' of grey zone operations – lighter shades blend with forms of coercive diplomacy (see below) and darker shades blur to combine with elements of hybrid warfare.

Hybrid warfare, in earlier definitions, referred to "a range of different modes of warfare, including conventional capabilities, irregular tactics and formations, terrorist acts including violence and coercion, and criminal disorder" (Hoffman, 2007, p.14). Its meaning has expanded to include a much broader view: "the blending of conventional and non-conventional methods to achieve political-military objectives by both state and non-state actors" (Aoi, Futamura & Patalano, 2019, p. 701).

Complexities around the meaning/s of grey zone and hybrid warfare have arisen due to use in different contexts, such as adoption of the terms from Russia-Ukraine conflicts for use in describing activities designed to affirm sovereignty in contested areas of the Indo-Pacific. Terms such as 'non-War military operations' and 'quasi-warfare operations' as used in Chinese military planning documents, contain elements of both grey zone and hybrid warfare (Insisa, 2023).

It is no surprise that the terms grey zone and hybrid warfare are characterised by ambiguity and amalgamations – such is their nature.

In this report, for the sake of clarity, grey zone refers to that which remains below the threshold for conflict, including coercive statecraft to shape strategic environments and deter hostile actions, and hybrid warfare refers to the combination of military with other means of conflict, including cyber and – especially -- influence operations. As the report focusses mostly on situations short of conflict, most of the report is concerned with the grey zone and strategic competition.

Strategic communication/s

Strategic communication has various meanings in defence and security discourses, and a related but broader meaning in the communication industries and related scholarly fields.

For the latter, strategic communication is related to the fields of public relations and advertising. Its emphasis is usually on being institutionalised, organised, and targeted.

Institutionalisation refers to strategic communication being typically undertaken by a large organisation such as a company, a government department, or a civil society organisation such as non-government organisation, political party or similar. Being organised refers to the process of strategic communication, which is structured and planned along prescribed lines. Targeted refers to part of this planning, which identifies and seeks to understand those significant individuals and groups that campaign success is depended upon.

A typical outline of strategic communication planning, by Botan (2021), suggests it includes:

"two minimum characteristics. First, research is conducted about the environment and the situation in which a campaign is to be carried out. This research has to assess, again at a minimum, the current opinions of the significant publics including an assessment of how the purpose, or goals, of a proposed campaign comport with the reality on the ground. Second, a plan is developed encompassing available resources, timing, sequencing of steps, and assignments that takes into account both the goals of the organization and the feelings, needs, and attitudes of the publics. This plan is the actual strategy." (p.7)

(Some further notes on how social media influence campaigns incorporate research into campaign planning are included in Appendix D.)

In military parlance, the term strategic communication is similarly used to denote communication activities that are coordinated and planned. Some of the variation in

terminology arises from the question of what is, or is not, strategic communication.

In some definitions, strategic communication supports other activities, including defence operations but also public affairs and diplomacy. Strategic communication in this sense has a supporting role.
Recent definitions of strategic communication from the United Kingdom and NATO (which uses the plural term, strategic communications) characterise it differently. Rather than being in support of other activities, the UK and NATO define strategic communication as "using all means of communication – comprising actions, images and words – to appropriately inform and influence an audience's attitudes and behaviours through a narrative-led approach in pursuit of the desired end state" (NATO, 2023, p.3).

The crucial distinction is that the former sees strategic communication as supporting other defence activities, whereas the latter sees all defence activities as being means of strategic communication. Additionally, the latter, more extensive, conceptualisation of strategic communication includes those activities that may not be undertaken as communicative acts in the first instance, that have other reasons for occurring but nevertheless have an impact:

"Everything NATO and its partners say and do, or omit to say and do, has intended and unintended consequences. Every action, word and image sends a message, and every member of the military is a messenger, from the individual soldier in the field to the theatre commander" (NATO, 2023, p.20).

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