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Inter Populum

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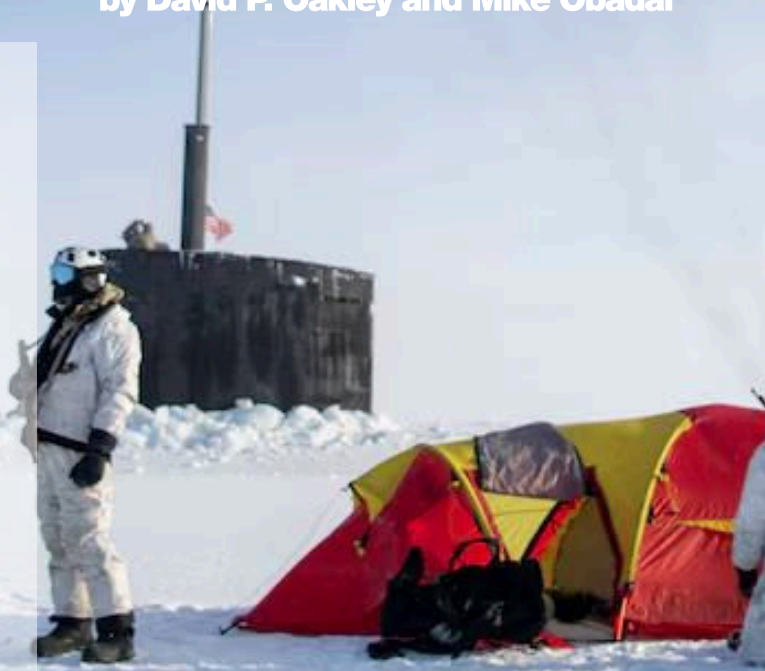
Want "Strategically Minded Warfighters?" Then Make "Intellectualism" a Military Value

by David P. Oakley and Mike Obadal



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ASU Arizona State University

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Synthesizing the Relationship Between Gendarmerie-type Forces and SOF

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ABSTRACT

Recent international military deployments have shown the prevalence of population-centric task settings. For Special Operations Forces (SOF), engaging with local populations is part of their nature. The undisputed existence of a separate Civil Affairs branch within SOF proves the military relevance of knowledge and skills on the civilian domain. Bridging the gap between police and military, gendarmerie-type forces (GTF) also have a strong societal focus. The rise of population-centric missions has increased the popularity of GTF, since they can conduct critical public order tasks for which the military is not traditionally equipped. This article aims to analyze if collaboration between SOF and GTF could be beneficial. Based on two empirical cases, namely the village stability operations program in Afghanistan and SOF in a civilian law enforcement role, occurring public order issues will be unraveled. These insights are then used to fuel a discussion on how collaborating with GTF could help SOF overcome such problems.

KEYWORDS

population-centric operations; village stability operations; civilian law enforcement; public order; gendarmerie-type forces; inter-agency approach

Introduction

Recent international military deployments have shown the prevalence of population-centric task settings. The invasion of Iraq in 2003 confronted the U.S. and its coalition partners with serious public order issues caused by the dissolution of Saddam Hussein's power structure. In the years following the Kosovo War, the European Union (EU) established the European Union Rule of Law Mission in Kosovo (EULEX) to support the peace process and strengthen the rule of law in the newborn country.[1] Winning the hearts and minds of local populations through reconstruction and development activities was a key element of NATO's strategy in Afghanistan to weaken the Taliban's position.[2] The UN-led Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) also pursued a

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strong security sector reform logic to help get the African nation back on its feet.[3] More recently, Russian Federation hostilities in Ukraine have deliberately targeted built-up inhabited areas to create social disruption, forcing the Ukrainian armed forces and their allies to focus on investigating war crimes, managing refugee streams, and addressing subversive elements.[4]

For Special Operations Forces (SOF), engaging with local populations is part of their nature. During World War II, under the Office of Strategic Services (OSS), the U.S. government deployed specially trained military agents deep within enemy territory to gather strategic intelligence and organize local resistance groups.[5] Although large-scale conventional force structures dominated the military landscape during the Cold War, SOF proved invaluable in proxy wars around the globe, often training and professionalizing indigenous warring factions in far-off places to support overarching geopolitical objectives.[6] The existence of a separate Civil Affairs (CA) branch within the SOF community proves the military relevance of civilian knowledge and skills.[7]

Gendarmerie-type forces (GTF) also have a strong societal focus. Originating from the Napoleonic era to maintain law and order in weakly controlled rural areas, GTF bridge the gap between police and military functions.[8] GTF are mainly a result of Europe's turbulent state-building process, and as such, did not firmly take root in Anglo-Saxon or Scandinavian countries. [9] Prominent examples include the French Gendarmerie, Italian Carabinieri, Spanish Guardia Civil, Austrian Federal Gendarmerie, and Netherlands Royal Marechaussee. The rise of population-centric missions has increased the popularity of GTF, as they perform critical public order tasks that traditional military forces are not equipped to handle, such as crowd control, combating organized crime, and reorganizing local police forces.[10]

Since the 2022 Russian invasion of Ukraine, Western militaries have refocused on "traditional" warfare. At the same time, they continue to learn from Security Forces Assistance (SFA) experiences in Iraq and Afghanistan. The U.S. and UK are leading the way by institutionalizing dedicated SFA and warfighting units within their force structures. This is not the case for most other Western militaries. Consequently, a gap in military SFA capabilities could arise for them. Historically, SOF have filled such capability gaps.[11] Interestingly, for western states with GTF, however, there may be an opportunity to leverage these forces to complement SOF in bridging the SFA gap.

This article analyzes the potential collaboration between SOF and GTF, assuming that most special operations require non-SOF support to address the changing international security environment.[12] Scientific contemplations on the dynamics of the Grey Zone, as well as Hybrid Warfare, point to disrupting public order and stability through non-military means and approaches.[13] At the same time, the literature stresses that SOF units often lack sufficient knowledge of policing and legal aspects critical for population-centric engagements.[14] Moreover, strategic thinking on the future role of CA tends to be quite military-oriented, focusing on the traditional task dimensions of initial entry, reconnaissance, engagement and influence, and support to resistance.[15] Based on two empirical cases—Village Stability Operations (VSO) in Afghanistan and SOF in civilian

law enforcement roles—this article will identify knowledge gaps and explore how collaboration with GTF can address these challenges.

SOF and Public Order Tasks

This section discusses two well-documented cases in which SOF were actively involved in population-centric activities. First, a combined analysis of Mark Moyar's study on Village Stability Operations (VSO) in Afghanistan is conducted. Second, John Alexander's research on the concept of "convergence," referring to SOF being increasingly used for civilian law enforcement tasks, is scrutinized.[16]

VSO

Moyar, former director of the Office of Civilian-Military Cooperation at the U.S. Agency for International Development, extensively studied SOF deployment in Afghanistan. His research focuses on two counterinsurgency (COIN) programs: VSO and Afghan Local Police (ALP). These programs contemplate direct enemy-centric anti-terrorism efforts, with an indirect population-centric approach to securing the Afghan populace.[17] This section discusses his findings along two lines. First, the origin and rationale of the VSO and ALP programs will be described. Second, the main public order challenges that have emerged in relation to these programs will be explained.

VSO Origin

In support of the VSO concept, experts were asked to analyze the history of Afghanistan, paying attention to societal evolution in general and security-related developments in particular. This analysis showed that, in a matter of decades—starting with the communist coup in 1978, followed by the Soviet intervention in 1979, and the internal struggle that began when the Soviets left in 1989—Afghanistan's traditional rural system of politics ceased to exist. Under this system, the central government funded local elites to keep the countryside quiet. With this funding, local militias could be established under community control (i.e., shuras or jirgas) and regulated by a tribal code of rules. What remained after the Soviet era was a country torn along ethnic and religious lines, with various warring factions fighting for self-interest, opportunistically coalescing and switching sides. With the support of Pakistan, the radical Islamist Taliban gained the upper hand in this domestic power play and, as of 1996, took control of most of the country. Granted refuge by Taliban rulers, the U.S. government decided to go after Osama bin Laden, founder of the terrorist organization al-Qaeda, in Afghanistan as retribution for the 9/11 terrorist attacks. The U.S. deployed SOF to Afghanistan to ally with the Northern Alliance, which was a partnership of different ethnic groups fighting the Taliban. With a combination of SOF operators giving military advice and directing air support, the Northern Alliance was able to overthrow the Taliban regime in a matter of weeks. After this regime change, Western countries sent troops to Afghanistan under NATO command to help the U.S. with its global fight against terrorism but also to prevent Afghanistan from becoming a safe haven for extremism again.

The U.S. and coalition troops soon found themselves entangled in an intricate web of warlords, militias, ethnic groups, and local communities. When NATO troops drove

insurgents out of a given area, the Afghan National Police (ANP) often proved incapable of preventing their return. The government-controlled ANP lacked the local knowledge, social ties, and, at times, the commitment needed to gain community support and develop sufficient situational awareness. Due to this poor performance, and inspired by COIN successes in Iraq, the SOF community became increasingly interested in the development of local security forces. Brigadier General Edward Reeder, Commander of the Combined Forces Special Operations Component Command-Afghanistan, first introduced the idea of community self-defense, arguing that enhancing local security would thwart insurgents more effectively than anti-terrorist direct-action missions. Reeder's successor, Brigadier General Austin Scott Miller, embraced this vision and persuaded other senior commanders to adopt it. Miller coined the more population-centric approach, Village Stability Operations (VSO).

Departing from the assumption that improving living conditions at the local (i.e., village) level would undermine the insurgency's foundations, U.S. SOF teams were deployed in significant numbers to rural Afghanistan to empower local communities to participate in securing and developing their own areas actively. It is worth noting that the above-mentioned insights were not revolutionary; they had already been articulated by former British military officer and COIN expert Robert Thompson in his landmark book, which emphasized the trinity of "clear, hold, and build." [18] Over time, however, the practical realities of counterinsurgency as experienced during the 1950s and 1960s were oversimplified into a "hearts and minds" narrative.[19] The failure of this narrative underscored the inconvenient truth that hard security is a structural component within the "hold" phase of counterinsurgency.

The interconnection between security, governance, and development forms the heart of VSO. On one hand, development initiatives can only succeed when security and good governance are in place. On the other hand, security and development depend heavily on effective governance practices and structures. VSO aims to comprehensively address these three core aspects by focusing on two primary measures: (1) building a trusted and committed local security apparatus and (2) reintroducing shared community decision-making through shuras. The Afghan Local Police program was established to support the first objective, while the creation of shuras aimed to build viable governance systems capable of constructively addressing security and development issues in communities often plagued by ethnic and tribal rivalries.

SOF Challenges

Moyar identifies several weaknesses in the VSO/ALP program, which can be categorized into two main challenges.[20] The first challenge pertains to insufficient public order expertise. While the military professionalism and ascendance of SOF were critical in gaining community support for the VSO approach, the more complex task of mobilizing local support after the fighting proved less effective. SOF non-military knowledge and skills were underdeveloped because selection and promotion processes did not explicitly consider criteria such as "the comprehension of foreign operational environments, the influencing of foreigners through interpersonal communications, and the solving of

complex and ambiguous problems through creativity, flexibility, intuition, and judgment."[21]

At a broader level, the study shows that public order knowledge was primarily confined to the Civil Affairs (CA) branch, yet nearly all SOF elements in Afghanistan were involved, either directly or indirectly, in community-centric governance and development tasks. Moyar emphasizes that "these subjects [governance and development] deserve to be taught in depth to SOF beyond the civil affairs community." [22] In addition, rural residential areas formed the center of gravity of the VSO program. This aligns closely with the traditional indirect approach of building defense capacity from the bottom up, adhering to SOF's core principle of local empowerment. [23] However, villages and local communities are part of an overarching public order system.

Interestingly, VSO proponents and supporters lacked sufficient knowledge on incorporating the VSO program into a comprehensive public order system involving the district, provincial, and national levels. Consequently, public order successes at the community level could not be effectively leveraged and were often frustrated by administrative and judicial deficiencies higher up Afghanistan's governmental structure. Moyar argues:

> "One of the most important lessons of VSO and ALP was that permanent village stability required building partner capacity beyond the village level. The Afghan government needed capacity at the district and provincial levels in order to sustain the ALP once the Americans departed, and it needed capacity at the regional and national levels to manage the provinces and direct national programs and resources." [24]

Finally, VSO teams received information from regular U.S. intelligence organizations. These were not attuned to public order tasks because enemy-centric activities predominated their operational focus. The fine-grained human terrain analyses required to properly fathom the social dynamics of a local community could simply not be delivered. In his study, Moyar states:

> Targeting the enemy was a clearly defined and clearly attainable activity [of U.S. intelligence organizations]; an individual could be defined either as hostile or not hostile and an individual's location could be specified with precise grid points. Analyzing partner-nation leaders, on the other hand, lay outside the experience of much of the intelligence world, and the predominant collection resources were not aligned with that mission. It required subjective analysis of complex problems, with few clear-cut answers.[25]

Numerical capacity is a second major challenge. The fractal VSO approach of sending small SOF teams to residential areas and villages asked for a large investment in troops. Given Afghanistan's vast geography and the scarcity of SOF, expanding the VSO footprint was inherently problematic. To address this, senior commanders could not be fastidious about which units to use. Ideally, CA officers would augment the regular SOF teams, but this preferred configuration was only possible in limited numbers due to the relatively small size of the CA branch. As a secondary measure, regular SOF teams without

CA support were sent to the villages. Furthermore, when VSO efforts gradually took root and community demand increased, the U.S. military was forced to allocate regular troops to the program to meet the growing needs. Moyar explains that such capacity-driven compromises affected VSO efficacy:

> For the U.S. conventional forces assigned to VSO and ALP, governance and development expertise varied widely. Some of their personnel had been engaged in governance and development during prior tours in Iraq or Afghanistan and possessed experience in redirecting intelligence assets to the human terrain. But the conventional officers assigned to VSO and ALP had not been handpicked for the mission, so some of those selected lacked relevant experience. Most of them did not receive significant pre-deployment training in governance or development, resulting in complaints that the conventional forces personnel assigned to VSO and ALP were not adequately prepared for their jobs.[26]

Acknowledging this problem, Wilkins states that "with quality as the goal, future SOF leaders should abstain from the temptation to employ conventional infantry forces to amplify irregular warfare programs."[27]

Apart from delivering sheer numbers, VSO capacity also involves committing resources over an extended period of time. The success of the program hinged on a high level of trust between the local community and the VSO teams. In short, if locals feared that the Americans would abandon them too soon, they would not actively oppose the Taliban insurgents for the sake of their own security. This divergence of interests made it increasingly difficult to sustain unity of effort within the VSO program. This principal-agent problem of divergence has been noted by other scholars.[28] Following this reasoning, it becomes clear that the political priority of reducing the number of Western troops—focusing on an end date instead of an end state—placed a significant strain on the VSO program.[29] In this respect Moyar concludes:

> Plans for large-scale U.S. troop withdrawals from Afghanistan coincided with plans for expanding the ALP, which multiplied the burdens on coalition forces assigned to VSO and required accelerated transition of ALP sites to the Afghans. Experience showed that prolonged coalition presence as long as two years was usually required to build enough local capacity to ensure successful transition.[30]

SOF and Civilian Law Enforcement

Alexander has written a monograph on the growing participation of SOF in law enforcement operations, both domestically and internationally.[31] He points to four developments that have fueled this trend. First, he explains that America's global war on terrorism has resulted in a growing number of deployments aimed at preventing extremist groups from finding sanctuary in internally divided and weakly governed countries. The previous account of the VSO program in Afghanistan is a typical example of this phenomenon. Alexander uses the term "overseas contingency operations," where SOF are typically used to strengthen the local security apparatus, capture suspects, collect evidence, and acquire intelligence.[32]

Second, the fight against international terrorism has exposed the nexus between terrorism and organized crime. Illegal drugs and arms trafficking are major funding sources of terrorism. In a transnational chain of interlocking criminal activities, organized crime syndicates and extremist groups consciously join forces.[33] As a result, the clear divide between external and internal security has gradually eroded.[34] Traditionally, external security has been the responsibility of the military, whereas internal security has largely been allocated to the police. SOF are increasingly called upon for domestic law enforcement tasks because of the merging of these two domains.[35]

Third, the level of violence exerted by organized crime groups is dramatically rising, triggering an arms race with law enforcement agencies. With the establishment of specialized units (e.g., SWAT), police forces are increasingly adopting a military way of operating and organizing, a phenomenon known as the "militarization of policing."[36] SOF have played a central role in training these units.

Fourth, Alexander notes that military assistance is provided to countries destabilized by pervasive criminality to fight the crime-terror nexus. [37] For example, in Colombia and Mexico organized crime groups have infiltrated all of society's arteries. With near impunity, they profit from a variety of illegal activities that pose a direct security hazard to the United States. [38] Based on bilateral agreements such as Plan Colombia and the Mérida Initiative, materiel support, military advice, and SOF training are used to disrupt organized, often drug-related, crime in the countries of origin.[39]

SOF Challenges

The growing involvement in law enforcement, both at home and abroad, presents several challenges for the SOF community—the most prominent being a lack of judicial procedural expertise. Knowledge of the legal aspects of mission execution, as well as details of criminal prosecution, is paramount when operating under civilian rule of law. Citing Alexander:

> In police academies across the country, recruits receive extensive instruction on civil and criminal law regarding the necessity for, and process of, obtaining warrants. Likewise, they are carefully schooled on the preparation and delivery of testimony in courts of law. They learn in excruciating detail all of the pressures that may be brought in cross-examination by defense attorneys. Unfortunately, SOF operators receive no such training and education. When asked how they learned about the conduct of raids that were bound by warrants and other legal constraints, or how they learned to give testimony in court, all stated they had none. Everyone interviewed for this project, who was involved in these operations, indicated they learned the process by trial and error after they were engaged in the process.[40]

The issue of personal liability makes bridging this knowledge gap even more important. When conducting law enforcement tasks, individual SOF operators must be protected from legal prosecution. To avoid lawsuits, police forces maintain detailed training records to

prove that individual officers are professionally up to date. Within the SOF community, however, training repositories are mostly focused on the hard skills associated with direct-action operations.

The second challenge concerns a lack of expertise in the collection and processing of biometric evidence. Correctly handling evidence is a part of every police officer's DNA. Improper conduct may lead to evidence being ruled inadmissible in court. When it comes to evidence collecting in a military expeditionary context, SOF are mostly the first security actors on the spot. In Iraq, they mostly relied on eyewitness testimony in court. Alexander states the following:

> The main testimony by these American troops is to place the suspect at the scene and confirm the existence of weapons, explosives, or other contraband found at the site of the apprehension. This witnessing is often accomplished by having photographs of the SOF personnel and suspects at the scene with the material that was taken into evidence.[41]

However, such an approach is legally questionable in today's domestic law enforcement context. Advances in biometrics, including DNA, iris scans, and facial recognition, have made forensic evidence a dominant factor in court trials. However, such an ap legally such an approach is questionable in today's domestic law enforcement context. Given that SOF personnel will likely continue to be involved in isolating and protecting vital evidence in different operational contexts, more intensive training in forensic science and producing evidence is paramount.

Third, Alexander mentions the notion of preparedness. Where the Posse Comitatus Act strictly restricts the use of federal military forces on U.S. soil, the Patriot Act, which was introduced after the 9/11 terror attacks, made it much easier for the U.S. government to address the terrorist threat militarily within its domestic boundaries. The Patriot Act, being a temporary legislative measure, was repealed by the U.S. government in 2019. Still, the whole endeavor shows that in the event of a major domestic security contingency, legal changes are made easily, implying that SOF should be prepared to shift between external and internal security task settings without compromising operational readiness and performance. Alexander argues as follows:

> if significant escalation occurs and/or the advent of terrorist attacks in which the actors strike multiple targets with the intent on holding buildings of other facilities, then it may be necessary to consider employing SOF elements domestically. Posse Comitatus Act, acknowledged, it would be better to contemplate these options now rather than being called in after the event has unfolded. It is the expansion of the drug cartels that could easily force such a scenario.[42]

Discussion

The VSO and law enforcement cases make clear that public order tasks can be troublesome for SOF. In a sense, they show that SOF have become victims of their own success. Generally speaking, in the event of an extraordinary security situation, SOF are the first to

be called upon. The SOF label, after all, signifies the ability to conduct special tasks that regular security actors cannot undertake. However, the notion of being "special" has evolved over time. Originally, during World War II, Special Forces had to execute missions unsuitable for regular military units, such as reconnaissance operations deep in enemy territory, hit-and-run assaults, sabotage, and supporting partisan groups.[43] Defense analyst Michael Fitzsimmons formulates the core specialty of SOF as follows: "They are stealthy and capable of operating independent of support and therefore can often penetrate denied areas that would be inaccessible to other forces."[44]

Based on their key characteristics of being team-based, versatile, self-reliant, extremely fit, and highly professional, the range of SOF missions has broadened and diversified as the years passed.[45] Ruling SOF doctrine lists a related mixture of enemy-centric and population-centric core activities, namely direct action, counterterrorism, foreign internal defense, unconventional warfare, special reconnaissance, psychological operations, CA operations, information operations, and counter-proliferation of weapons of mass destruction.[46] In today's environment, where asymmetric threats dominate, SOF remains a crucial part of the security response.[47] Interestingly, many of these new "hybrid" threats stay below the threshold of officially declared war. State and non-state adversaries use propaganda, military activities, economic pressure, social provocations, cyberattacks, and political influence to exert power.[48] However, the ambiguous and multifaceted nature of hybrid threats has led to the conclusion that SOF alone cannot address such security challenges.

The required expertise—spanning social media dynamics, cyber tactics, languages, foreign cultures, religions, and global micro-regions—is so diverse that it simply cannot all be found in one single organizational entity.[49] Consequently, strategic thinkers argue that to truly leverage SOF's capabilities in a hybrid context, a customized collaborative multi-agency approach is needed. [50] The aim is to create a synergistic mixture of different complementary specialties, including SOF. Content-wise, public order plays a pivotal role in countering hybrid aggression. Stable societies, built on credible and legitimate governmental institutions, are less vulnerable to hybrid aggression than poor, politically unstable states, where chaos and anarchy create a window of opportunity for malicious actors to engage in subversive activities.[51]

Knowing that hybrid conflicts require an interagency approach—where SOF and other elements collaborate to safeguard, improve, or restore public order—highlights the value of gendarmerie-type forces (GTF) as promising partners. GTF occupy the middle ground between military and police. It is important to note that the military police (MP) branch and GTF, while similar, are not the same. Both entities are trained and equipped to execute key policing tasks in support of overarching military operations, including: (1) policing the force, (2) mobility support, (3) detention, (4) security, and (5) stability policing. What sets GTF apart is their additional domestic role in maintaining public order under civilian law, such as border control, rural policing, high-risk security, combating organized crime, riot control, and addressing cross-border economic crime.[52] Having their roots in Europe's nation-building process following the French Revolution, GTF were primarily introduced in countries under Napoleonic rule. As such, GTF are not common

assets among all Western militaries. Today, countries such as France, Italy, Spain, Portugal, the Netherlands, Romania, and Poland have incorporated GTF into their forces.[53]

GTF are seen as valuable tools for addressing the security gap in modern policing contexts, both nationally and in international conflicts.[54] Civilian police forces are ill-suited for coping with situations of open or simmering armed conflict.[55] Due to their military training and heavier equipment, GTF offer a robust alternative, capable of seamlessly cooperating with regular military troops when violence reaches its peak. However, despite their paramilitary characteristics and combat potential, GTF are not a typical fighting element. Their primary goal is restoring order, focusing on de-escalating violence. This restrained use of force makes GTF ideal for population-centric activities.

According to retired Air Force Colonel Michael Dziedzic, the security gap for which GTF can be used manifests in three ways: (1) a deployment gap, (2) an enforcement gap, and (3) an institutional sustainability gap.[56] A deployment gap refers to the time lag in deploying an operational civilian police contingent during peace processes following armed conflict. This time window is particularly risky due to the high likelihood of hostilities reigniting or lawlessness taking hold in a war-torn region lacking a functioning local security apparatus and where weapons are readily accessible. An enforcement gap refers to the lack of capabilities to address activities that fall between major combat operations and non-violent community policing. To fill this security void in the aftermath of armed conflict, robustness, scalability, and a broad law enforcement repertoire are crucial to properly deal with political-criminal power structures, rogue intelligence organizations, warlords, fanatical religious groups, or global terrorists trying to actively undermine the peace process. Opposed to the first two gaps, the institutional gap does not primarily refer to a post-conflict public order void. The institutional gap concentrates on the issue of creating sustainable security within a country. This requires a long-term perspective of political development, comprehensively addressing the complete legal chain, from law-making to enforcement, justice administration, and imprisonment. Delivering justice for all citizens mitigates the risk of simmering public discontent that can lead to institutional collapse and conflict. It is important to add, however, that institutional gaps do not only emerge in weak states. The blurring of internal and external security has also created institutional judicial vacuums in Western countries with well-established legal systems.[57] As such, improving national security frameworks in response to domestic concerns such as pervasive criminality, refugee streams, and radicalization and extremism, has become a major point of concern in many developed nations.[58]

GTF and SOF

Peter Neuteboom offers an overview of the activities that GTF can execute to help bridge the different security gaps.[59] He differentiates between formal public order (e.g., crowd and riot control), law enforcement (e.g., criminal investigations), and miscellaneous activities aimed at signaling, preventing, or deescalating social disturbances (e.g., advise and training). Based on this repertoire and the accompanying set of equipment, GTF could be a useful partner for SOF too. For population-centric tasks, it might, for example, be worthwhile to have a provost marshal office in the SOF command and control structure to provide

decision-making support with expertise in law enforcement and public order. Another approach could be augmenting SOF teams on the ground with gendarmerie specialists to enhance performance through policing knowledge and specialized skills, techniques, and equipment. The strategic use of non-lethal weapons, for instance, could help SOF to be coercive, while preventing the risk of public sentiment backfiring. To improve SOF scalability, partnering with GTF is an intriguing option. Combining GTF and SOF resources creates a far larger base for population-centric operations. This numerical advantage could be exploited in several ways. For example, a phased approach might allow SOF teams in VSO-like settings to be relieved by GTF units if the security situation stabilizes. Alternatively, the two forces could work in complementary roles. A good example in this respect is the recent contingency that took place in Afghanistan at Kabul International Airport. Many countries deployed a national SOF element to execute a Non-Combatant Evacuation Operation (NEO) when the Taliban retook control over the country. The television images showed that these relatively small units were overwhelmed by massive crowds attempting to gain access to the airport to escape the country. GTF, with their training and equipment for crown control, could have provided both the mass and tactics needed for dealing with such crowds. Such a partnering force would have given SOF far more leeway in conducting pinpoint actions, such as escorting national citizens to safety.[60]

Tactical collaboration between SOF and GTF requires, above all, joint training programs to foster integration, interoperability, and interdependence.[61] Additionally, former Principal Deputy Director of National Intelligence David Gompert suggests investing in a more flexible force structuring approach to better deal with today's multi-faceted and uncertain security environment. More precisely, he proposes a basic design of a core combat nucleus (i.e., SOF) complemented with additional capabilities.[62] These complementary elements are schematically presented in two concentric circles: core joint capabilities and regular service building blocks. Core joint capabilities refer to supporting elements that are likely to be needed by the combat nucleus during deployment. Regular service building blocks, while less critical, can also be called upon but may require more preparation time. Given the increasing focus on population-centric tasks with a variety of judicial complexities, GTF could reasonably be included in SOF's primary support circle of core joint capabilities. Establishing such a formal interrelationship would enable both communities to strengthen their collaboration and grow together.

Conclusion

This study aimed to analyze the collaboration potential of SOF and GTF. Because this topic is relatively underdeveloped in academic literature, empirical cases of U.S. SOF dominate this work. In particular, the case on SOF and domestic law enforcement has a strong United States focus because of its connection with the war on drugs strategy. It is therefore uncertain whether the U.S. experiences with employing SOF domestically or in expeditionary roles to combat drug-related crime are directly applicable to other Western countries. Despite this bias, security literature in general paints a convincing picture of internal and external security merging. It emphasizes that law enforcement and public order will no longer be the sole responsibility of police forces; increasingly, the military will also have to play its part. Indeed, the VSO and domestic law enforcement case make clear that

SOF are already actively involved in tasks where military and policing activities intertwine. Although population-centric behavior is, generally speaking, a well-developed SOF trait, the cases also bring to the fore that many of today's task settings have a strong civilian law enforcement dimension for which SOF are less prepared. To maximize the unique capabilities of SOF in a civilian law enforcement context, this article introduces GTF as a promising enabling partner. GTF conduct public order tasks daily under civilian law, but, owing to their semi-military status, also possess the knowledge and robustness to manage social disturbances in contested environments in collaboration with military units. This dual-headedness makes GTF an ideal complementary partner for SOF, as civilian law enforcement techniques, tactics, equipment, and knowledge can, in a plug-and-play fashion, be added to the operational portfolio under varying circumstances. Lastly, it is interesting to note the similarities between the 19th-century origins of GTF and the realities of contemporary COIN and SFA missions. In a way, one could argue that the call to add GTF to SOF's operational repertoire marks a modern-day, expeditionary return to the early state-building logic that gave rise to GTF.

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Educating the Irregular Warfare Practitioner

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ABSTRACT

This article addresses the challenges faced by the United States in maintaining a consistent approach to irregular warfare (IW), which has historically been characterized by a "boom and bust" cycle of investment and focus. Despite recent advances, such as the establishment of a Department of Defense (DoD) Irregular Warfare Center and the development of curriculum guidance, the U.S. risks under-preparing IW practitioners. The article emphasizes that IW practitioners are not limited to military personnel but include a broader spectrum of professionals across diplomacy, intelligence, law enforcement, and the private sector. It explores key concepts and knowledge areas that IW practitioners need, which are often excluded from traditional military education. These include the historical context of IW, social science theories such as identity theory, regime typology, resource mobilization, and the role of nonviolent action in gaining legitimacy. The article concludes by recommending measures to integrate history, social sciences, and practical IW lessons into more comprehensive education programs for this diverse group of practitioners, breaking the cycle of neglect in IW education.

KEYWORDS

irregular warfare; professional military education (PME); competitive statecraft; identity; resource mobilization; selectorate theory; non-violent action

Introduction

Military scholars and practitioners often speak of a "boom and bust" cycle that characterizes the U.S. approach to and investment in irregular warfare (IW).[1] "Boom and bust" refers to the notion that the United States and its military have found themselves involved in warfare characterized as 'irregular' throughout history. When one generation begins to develop knowledge, expertise, and capability in fighting irregular conflicts, political, strategic, and budgetary pressures shift the focus back to conventional or traditional warfare. As a result, valuable lessons learned are removed from curricula and relegated to the archives—or so the narrative goes.

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Over the last five years, however, there have been reasons to think that the country and the Department of Defense (DOD) might have taken measures to break this cycle. There is undoubtedly a renewed focus on conventional warfighting capability in the wake of the wars in Afghanistan, Iraq, and other conflicts once associated with the "Global War on Terror."[2] However, there are also encouraging signs for IW, including the establishment of a DOD Irregular Warfare Center (IWC), a recognition of IW's importance in recent defense strategies and other documents, and even the creation of a "Curriculum Guide" on IW for professional military education (PME).[3] Despite these efforts, the United States is still at risk of failing to maximize its potential for competing and campaigning through IW. Two related reasons for this risk stand out: first, a failure to correctly identify IW practitioners, and second, a failure to educate them in a way that imparts the concepts, perspectives, and wisdom needed to be effective.

This article explains who IW practitioners are and what key concepts they should be taught to make them better equipped to develop strategic and operational approaches to irregular conflict. The answers to both questions may surprise even those active in the IW community of interest. Here's a hint: The IW practitioner is not necessarily the soldier or even the special operator. Here's another hint: The concepts that need to be taught and learned are not featured in DoD's IW Curriculum Guide, though some of them can be found in NATO's new *Hybrid Threats and Hybrid Warfare Reference Curriculum*.[4] Unfortunately, before these two big questions can be addressed, one must understand the definitions of IW and the controversy surrounding the different schools of thought. The first section explains the definitional controversy and uses that discussion to answer who IW practitioners are. The second section provides a perspective on what subjects and concepts these practitioners need to understand. The concluding section offers some thoughts on corrective action.

Identifying IW Practitioners: Definitions of IW

For those of us involved in IW education and research, we are a bit weary of this ongoing discourse. IW, as a term, has a long and contentious history.[5] Our NATO partners do not seem to like the term and have preferred substitutes such as "hybrid threats" and "hybrid warfare," though admittedly the overlap is not perfect.[6] Still, other scholars would prefer the broader, less militarized term "competitive statecraft."[7] While the definition of competitive statecraft doesn't exactly match those of IW, the overlap is significant. Other scholars have even questioned the "categorical confusion" that arises from classifying activities or threats as "irregular."[8] Last year, the DoD updated the joint definition of IW, which had been mostly unchanged since 2008. However, that did not stop others from offering their own definitions, including the Army, whose current definition still differs from the joint definition. A sample of these definitions is listed in Table 1, with keywords highlighted for convenience.

Source	IW definition
DOD Dictionary 2023[9]	A form of warfare where states and non-state actors campaign to assure or coerce states or other groups through indirect, non-attributable, or asymmetric activities.
JP 1-02 (2008–2023)[10]	A violent struggle among state and non-state actors for legitimacy and influence over the relevant population(s).
Army[11]	The overt, clandestine, and covert employment of military and non-military capabilities across multiple domains by state and non-state actors through methods other than military domination of an adversary, either as the primary approach or in concert with conventional warfare.
Marks and Ucko[12]	A coercive struggle that erodes or builds legitimacy for the purpose of political power. It blends disparate lines of effort to create an integrated attack on societies and their political institutions. It weaponizes frames and narratives to affect credibility and resolve, and it exploits societal vulnerabilities to fuel political change. As such, states engaged in, or confronted with, irregular warfare, must bring all elements of power to bear under their national political leadership.
Seth Jones[13]	Activities short of conventional or nuclear warfare that are designed to expand a country's influence and legitimacy, as well as weaken its adversaries.

Table 1: Sample IW Definitions

The competing definitions make it difficult to determine *who* conducts IW, what *activities* they are engaging in, and what *objectives* they are fighting over. Some definitions focus on forces and actors—the "who." Others focus on the character of actions or activities (covert, non-attributable, asymmetric, etc.). Still, other definitions, such as Seth Jones' definition, emphasize thresholds of conflict, i.e., avoiding escalation and focusing on activities that improve one's position without provoking conventional or nuclear warfare, commonly referred to as the "grey zone." However, the most useful and foundational definitions are those, such as Marks and Ucko's, that focus on IW as an alternative *theory of victory*. In other words, rather than aiming to defeat an opposing armed force to achieve victory, coercion and influence are used to gain legitimacy with relevant populations, achieving victory through political power. These definitions (or the parts of definitions) are much more helpful in informing us about who conducts IW and what they should learn.

A key problem in defining IW is the word "warfare." The new DoD definition makes the cringe-worthy tautological error of using part of a word to define itself. Surely, "warfare" implies violence, or at least the threat of violence. That is often the presumption of any group of military professionals attempting to define IW. Yet the military's understandable obsession with violence, far from being foundational in the definitional debate, is perhaps the biggest hindrance to a deeper understanding of operational

approaches. Irregular warfare does *not* need to be violent, though it certainly can be and often is. It is probably coercive, though it need not be exclusively so. The essence of IW is not necessarily in the activities themselves; it is in relevant populations, influence, and legitimacy. Coercion and violence are just important parts of the mix, characteristics of activities that become part of something based on why it is being done. They may be necessary, but they are rarely sufficient to characterize an approach or activity as IW. In IW, the distinction between what is politics and what is warfare is non-existent. Insert your favorite Clausewitz quote here. If violence and coercion were both necessary and sufficient, we would be talking about conventional or traditional warfare and wouldn't need IW.

The definitions of IW, as well as the current authoritative DoD texts, reflect this. The Army (the service closest to IW activities) emphasizes "non-military capabilities" and "methods other than military domination" in its definition. Marks and Ucko, two prominent IW scholars, emphasize "political power," "political institutions," "societal vulnerabilities," and "political change." Even DoD's Curriculum Guide dances around this reality, leaving a lot of signals in the noise. that IW is conducted "primarily in collaboration with interagency and other inter-organizational efforts" and dedicates an entire section to the need for "seamless integration of multiple elements of national power—diplomacy, information, economics, finance, intelligence, law enforcement, military, etc."

The guide even acknowledges that the military is rarely the main effort: *"DoD is not often the supported element in IW; rather, it is usually a supporting element in an ad hoc relationship coordinated between the various USG allies and partners. Interagency partners have different capabilities to apply to competition."*[14]

If IW is not characterized exclusively, or even primarily, by violence; if influence and legitimacy among relevant populations (as opposed to coercion) are the near objectives and political power the main objective; and if departments and organizations other than DoD and the military are the main effort, then we have an answer to the first question: Who are IW practitioners?

Military personnel can and should certainly be included in the group, but they are just a small fraction—of some significance, though often overestimated. The real IW practitioners are those who work in intelligence, covert operations, diplomacy, foreign aid, law enforcement, the private sector, the media, etc. And yes, some military folks too. IW is more than an interagency effort; it is an inter- (and intra-) society endeavor.

What Should IW Practitioners Learn

If we begin with the new premise that the IW practitioner is not exclusively, or even primarily, a soldier or military officer, then it becomes easier to design curricula for IW at different levels. Even a DoD-centric curriculum guide or reference should start with theories and concepts that build a common framework for understanding societies,

institutions, political power, influence, and legitimacy. The DoD Curriculum Guide, however, begins with DoD's 12 "IW activities" and lists learning objectives such as "Describe the character of IW, its core missions and enabling activities, and its impact on Service missions." A more appropriate curriculum guide would start by identifying (1) the use of history through historical case studies and themes and (2) social science concepts that might be most valuable for understanding how state and non-state actors use coercion, influence, and legitimacy to pursue political power through relevant populations.[15]

The Use and Abuse of IW History

When it comes to the history portion of an IW curriculum, curriculum designers already have the benefit of the guidance that Sir Michael Howard provided in 1961 for military professionals studying war. Howard's advice for the study of conventional war is equally applicable to the study of just about any other profession related to security, whether it be diplomacy, finance, or policing. IW practitioners should follow Howard's advice and study IW in *width, depth, and context*.[16] To study IW in width, the practitioner must quickly dispel any juvenile notion that IW is a new phenomenon and observe how IW has developed over a long historical period. For, as Howard said about warfare in general, "only by seeing what does change can one deduce what does not." There are continuities and discontinuities to be observed between deep studies of the counterrevolutionary rebellions in the Vendée (France) in 1793 and the formation and activities of the Ku Klux Klan in the Southern U.S., circa 1867, where relevant populations, instilled with narratives of relative deprivation, organized and mobilized resources to conduct both violent and nonviolent activities in pursuit of political power.

As such, there is also value in studying the history of IW in depth, where IW practitioners might take a single campaign and examine it thoroughly, not just through official histories but from the many angles and perspectives provided by primary sources. It is valuable to read Alistair Horne's *A Savage War of Peace*,[17] but it is far more valuable to supplement it with Remy Mauduit's *The Insurgent Among Us* and perhaps the letters, correspondence, and records of some of those Algerians who made up the relevant populations and the source of political power.[18]

Finally, just as Howard advised military practitioners, IW practitioners must study IW history in *context*.[19] IW campaigns, even more so than conventional campaigns and battles, are not like games or sports matches. They cannot be detached from their political, social, and cultural contexts. In IW, these contexts do not just "influence" the battlefield, as they do in conventional warfare—these elements of context define the battlefields. To explain the collapse of the Soviet Union and other communist regimes in the late 20th century, or to understand modern "color revolutions," one must dive deep into the narratives, organization, communications, resource mobilization, and external support of opposition groups as they sought political power by eroding the legitimacy of regimes and their political leaders.

Just a Little Social Science

If only history were enough. The inductive nature of historical inquiry is of immense value to the IW practitioner. However, most of those who need to be educated about IW approaches require the deductive tools of the social sciences to provide frameworks for understanding. The list of social science concepts and theories valuable to the IW practitioner is likely too extensive for this brief essay, but a few topic areas stand out—especially given the definitions of IW described in the first section. Unsurprisingly, none of them are found in DoD's IW Curriculum Guide, though a few of them (thankfully) are alluded to in NATO's reference curriculum.[20] Any serious IW education that intends to focus on the diverse group of IW practitioners must address theories and subjects that are neglected in most PME while simultaneously being of immense value in IW campaigns. For simplicity, I label these topic areas as (1) Identity theory, (2) Regime typology and dynamics, (3) Resource mobilization, and (4) Legitimacy and nonviolent action. I will discuss each of these four areas, describing key theories and highlighting scholarly works while also identifying and describing both real and hypothetical situations where understanding these areas might aid (or have aided) the operational-level IW practitioner. Additionally, I will offer, where necessary, words of caution on the limitations of social science in general and the specific theories within these topic areas.

Identity (Who are you? Who are 'they'?)

All IW definitions refer—explicitly or implicitly—to "groups" or "relevant populations," and most emphasize the importance of influence. Before the IW practitioner can hope to design strategies and operational approaches, she must understand the relevant population(s), groups, or other actors. Understanding and defining such populations or groups in any context requires a foundational understanding of identity and, more importantly, collective identity. Who people are is based on how they define themselves and how others define them.

The social sciences have much to teach us about collective identity, and without the benefit of such foundational knowledge, IW practitioners are likely to make the same kind of unforced errors that U.S. forces made in the early days of the Iraq War, where supposed intelligence professionals, trained in enemy orders of battle and conventional force doctrine, decided to define a complex and multifaceted insurgency with the useless and intellectually lazy aggregation "Anti-Iraqi Forces." [21]

Teaching concepts of identity to IW practitioners should begin with introductions to foundational works of social identity theory[22], self-categorization theory[23], and collective identity theory.[24] IW practitioners don't need to be graduate-level experts on these topics, but even a cursory understanding is enough to provide them with the mental models and vocabulary they need to consult with experts and explore the literature through self-study. Once they understand the basics of how people collectively identify with each other, they can begin to grasp the importance of narratives and stories for those identities and then

start to develop a framework for understanding the directly practical concepts of narrative and cognitive warfare.[25] Just as importantly, the IW practitioner begins to understand that individuals and groups may have complex identity hierarchies and must cope with their own intersectionality of identities. Furthermore, budding IW practitioners begin to see that identity is socially constructed and, therefore, can, with concerted effort and time, be changed.

While the sheer volume of excellent works on this topic is too great to list, two stand out for their ease of reading and suitability for academic environments. The first is a much-overlooked textbook by John M. Collins, *Military Geography: For Professionals and the Public.* Though this essay began with the argument that soldiers do not make up the bulk of IW practitioners, Collins' book on "military" geography has as much to say about identity, influence, and relevant populations as it does about physical terrain and maneuver. While part one of the book concentrates on physical geography as it might be relevant to the cavalry commander, parts two and three focus on cultural and political-military geography, respectively.[26] The book needs an update but remains valuable for bringing military and non-military IW practitioners together with a common understanding and vocabulary for both conventional and irregular campaigns.

A second book worth reading in its entirety and serving as a basis for discussion is Benedict Anderson's classic, *Imagined Communities: Reflections on the Origin and Spread of Nationalism.*[27] Too many budding IW practitioners fall into the unfair trap of misusing the word "nation" in the IW context. Our entire national security and international relations discourse works against them. Students are often surprised to realize that a "nation," in its purest definition, is not a geographic or even geopolitical entity. We often use it as shorthand for the idyllic concept of the "nation-state." DoD and other agencies use the clumsy term "Partner Nation" to refer to the governments and administrations of foreign countries with whom they work. Yet, fundamentally, a nation is a group of people that share a socially constructed collective identity that can be, and often is, extremely fragile. Like all social constructions, nations require maintenance and reinforcement through narratives that build (or erode) their legitimacy. Grasping this concept and its dynamics can be critical to understanding more advanced IW topics, including resistance and resilience.[28]

Regime Typology (The Logic(s) of Politics)

Most budding IW practitioners have an underdeveloped understanding of political power within states (not necessarily nations). The same can be said for their grasp of the incredibly large and diverse concept of so-called "non-state actors." There is value in helping students understand the distinctions between terms such as state, country, nation, government, administration, and regime.[29] Of these key terms, *regime* is probably the most important. In political science, a regime refers to the formal and informal structures and characteristics of political power or, more simply, the set of rules and norms that determine political power. States and non-state actors are organized and governed by leaders who

emerge through some type of political regime. IW practitioners will struggle to develop successful IW approaches without a foundational understanding of the sources and distribution of political power in the countries and societies they wish to affect. Yet neither the DoD Curriculum Guide nor the NATO curriculum reference says much about how students might understand political power and influence.

There are several valuable books, references, and theories for observing, framing, and understanding political power and influence. One excellent place to start is with the foundational framework of comparative politics known as selectorate theory or the logic of political survival. Selectorate theory, developed by Bruce Bueno de Mesquita and colleagues, is especially helpful for the IW practitioner as it provides a framework for understanding the dynamics of power and legitimacy in different political systems. Selectorate theory posits that the stability and policies of a regime are heavily influenced by the size and composition of its "selectorate" (those with a say in choosing the leader) and "winning coalition" (the subset whose support is essential for the leader's survival). Even dictators like Kim Jong-un have a selectorate and a winning coalition, and they must appease and reward them to survive.

In IW, understanding the selectorate can help practitioners identify key power brokers and potential allies or adversaries, thus enabling more effective approaches to influence while reinforcing or destabilizing the regime. Furthermore, the logic of political survival emphasizes that leaders prioritize their own political survival over national interest, often engaging in policies that favor their winning coalition to maintain power. This insight is valuable in IW, as it helps practitioners anticipate and exploit the vulnerabilities and motivations of adversary or proxy leaders. By understanding that leaders may prioritize the demands of their winning coalition over broader public welfare, practitioners can design approaches that create political pressure or offer incentives to shift loyalties within the coalition. This knowledge can lead to a more nuanced and effective engagement in IW scenarios, where winning the right hearts and minds and influencing power dynamics are as critical as military victories.

There are certainly pitfalls to overreliance on this singular framework. Its simplicity and generalizability make it an attractive and helpful explanatory and exploratory theory. However, the IW practitioner must be cautioned to explore the cultural dynamics of such relationships and avoid the temptation of simplistic authoritarian teleology, where every decision of a dictator or single-party system is assumed to be purely about survival and self-preservation.[30]

Resource Mobilization (> Than Relative Deprivation)

Another critical topic area for which social science provides tools to help explain and explore causality is the why and how of social movements. Social movement theory attempts to answer the complex questions of why and how people rebel and why some organizations or movements succeed while others do not. It's unsettling to find someone

working in the IW space who has never heard of Ted Robert Gurr and his theories of relative deprivation, but it is even more frustrating when such would-be practitioners have no understanding of the critical importance of resource mobilization. Resource mobilization theory asserts that all social movements (violent and nonviolent) form when people who share grievances or other strong motivations can mobilize resources and act for political power and influence. When we say resources, we are not exclusively talking about raw materials, but rather all the things—tangible and intangible—that are necessary for success. Non-state actors need many of the same resources that state actors require. People are almost always the most important resource, but money is probably a close second because it can purchase other resources such as weapons, ammunition, transportation, food, etc. (including people). There are other intangibles like training, knowledge, communications, and intelligence. Depending on the context and the political opportunity space, non-state actors might also need sanctuary or diplomatic support for international legitimacy. While context determines what resources actors need, it is the nature of IW that resources and resource mobilization are always critical to the success or failure of IW approaches. The reason many counterinsurgency theorists emphasize separating insurgents from the population is because of the resources (human and otherwise) that the population provides. However, even if insurgents are separated from the population, an insurgency can still succeed if it mobilizes resources from abroad across a porous border.

Once practitioners understand the critical importance of resource mobilization to non-state actors, the world of IW opens. Practitioners suddenly and profoundly recognize the importance of financial intelligence and counter-threat finance to IW.[31] Far from being one activity among many, these activities become central to approaches to both proxies and threat organizations. Additionally, the study of proxy warfare becomes much more complicated and nuanced. Both the type and quantity of resources provided to non-state actors from external state and non-state sources become critical to success. Unfortunately, there isn't enough literature on this topic geared specifically toward the IW practitioner. This is partly because IW practitioners have often been misidentified as primarily military personnel and perhaps because the apolitical (or non-partisan) ethos of civil-military relations has made the study of highly political social movement theory somewhat taboo.

Nevertheless, two useful works can illuminate the importance of resource mobilization and social movement theory for IW practitioners. The first is McCarthy and Zald's famous article from the *American Journal of Sociology,* "Resource Mobilization and Social Movements: A Partial Theory." This article was critical in focusing the field of sociology on resource mobilization and compelling scholars to disaggregate social movement sectors into industries and organizations to better understand why some groups succeed or fail.[32] The same logic is powerful in framing violent non-state actors, movements, and organizations employing both violent and nonviolent approaches. If sociology is a bit too advanced for students at certain levels, Marks and Ucko's free publication, *Crafting Strategies for Irregular Warfare,* provides valuable insights into

political opportunity space and the quest for key resources in IW strategies.[33] Although the book is written for PME, it excels in emphasizing whole-of-government and whole-of-society approaches while highlighting the importance of political opportunity structures in determining the feasibility and suitability of IW approaches.

Legitimacy and the Efficacy of Non-Violent Action

Finally, there is the social science behind the concepts of legitimacy and nonviolence. Legitimacy itself is a concept that deserves more attention in the social sciences in general and as it relates to IW in particular. In social sciences, legitimacy is commonly defined as the belief that a rule, institution, or leader has the right to govern.[34]

There is a close relationship between non-violence and legitimacy. There is a close relationship between nonviolence and legitimacy. For most modern humans, this seems intuitive, and the body of scholarly research supports it.[35] Nonviolent approaches within IW not only have a legitimacy advantage, but they also have a resource mobilization advantage. Studies of nonviolent social movements show that nonviolent resistance presents fewer obstacles to moral and physical involvement, information and education, and participatory commitment.[36] Unfortunately, the military's understandable focus on violence and coercion in defining IW has caused an intellectual diversion away from the most effective group of IW tools.

Educating the IW practitioner on the theory and tools of nonviolence isn't difficult. The literature is well-known. The research of Erica Chenoweth and Maria Stephan is comprehensive, and their book, *Why Civil Resistance Works: The Strategic Logic of Nonviolent Conflict,* has become a powerful resource for both researchers and activists. Military students of IW might feel a bit out of place in a classroom studying these concepts, but recognizing the greater utility of non-military approaches is likely to build knowledge and wisdom valuable for encouraging strategic restraint and for developing better estimations of the risks of violent approaches. Military students might also find inspiration and enlightenment in Thomas Ricks' *Waging a Good War: A Military History of the Civil Rights Movement, 1954-1968.* The book highlights the challenges of waging an IW campaign aimed at eroding the legitimacy of an adversary in the eyes of relevant populations for the purpose of political power. Identity, regime typology, resource mobilization, and the efficacy of nonviolence in achieving legitimacy are all central themes, even though Ricks might not frame them in those terms.[37] Chenoweth and Stephan have also conducted groundbreaking work on understanding external support for civil resistance, which clarifies issues related to supporting nonviolent proxy efforts.[38] There are also valuable works of prescriptive theory, such as Gene Sharp's classic *From Dictatorship to Democracy,* which has served as a guide for many organizations and leaders trying to mobilize resources to erode or build legitimacy in the eyes of relevant populations for the purpose of political power.[39]

What is to be done?

The U.S., in general, and the DoD, in particular, have already made impressive strides to break the "boom and bust" cycle of IW education and investment. Several boutique PME programs go beyond merely teaching about IW activities and delve into theory and history. The College of International Security Affairs (CISA) at the National Defense University (NDU) stands out for its curriculum and specific programs, as do some courses and programs at advanced service schools for operational planners. These programs include a smattering of non-military students but primarily exist for military practitioners—not the broader population of IW practitioners as defined here.

Thus, while much has been done, there is still much more to do. The U.S. government and its allies could make two broad categories of changes. First, they could focus on the real practitioners of IW, including interagency and whole-of-society actors. Second, they could advance education and build IW curricula based more on history and social science rather than on activities. Recognizing that the real IW practitioners are not necessarily soldiers is difficult. If making that recognition requires rebranding "irregular warfare" with a new name and adjusted definition, then perhaps that is necessary.[40] The term "competitive statecraft" is a good start because it implies efforts beyond military power and violence. Irregular warfare could then refer specifically to those activities led by the military within the broader framework of competitive statecraft.

To achieve this, the U.S. government could redirect funding from the Department of Defense's (DoD) Irregular Warfare Center (or change its mission) to an interagency and whole-of-society center that prioritizes research, education, and training for a much broader range of practitioners.[41] Additionally, the DoD could reform its PME enterprise by outsourcing more of its degree programs to civilian institutions in joint ventures with other agencies and the private sector.

Once the country is focused on the right group of practitioners, the IW (or newly named) center should develop a curriculum guide that is neither military nor activity-centric but instead focused on the history and social science of IW and the societies where it is waged. This curriculum should include topics such as identity theory, regime typology, resource mobilization, legitimacy, and nonviolent action, providing a common IW vocabulary across the diverse groups implementing such approaches.

In particular, the curriculum should enable IW practitioners to study the history of IW in width, depth, and context, using historical case studies and incorporating social science concepts to understand the complex dynamics of IW. This includes understanding the importance of influence and legitimacy among relevant populations, as well as the role of non-state actors and proxy warfare. By adopting a more comprehensive and interdisciplinary approach to IW education, we can ensure that practitioners are equipped to develop effective strategies and operational approaches that account for the complexities of IW.

Ultimately, breaking the "boom and bust" cycle of IW education and investment requires a commitment to building a more comprehensive and effective approach to IW that incorporates the expertise and perspectives of a broader range of practitioners. By redirecting funding, building a more inclusive curriculum, and, if necessary, renaming IW, we can ensure that practitioners are prepared to succeed in this complex and dynamic field.

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Strategy for a New Era: USSOCOM Takes on Strategic Competition

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ABSTRACT
In a new era of strategic competition, U.S. Special Operations Command (USSOCOM) must identify opportunities to outcompete China and Russia where and when it is most crucial, maintaining the U.S. technical edge and strategic advantage. USSOCOM needs a foundation for strategy and policy, along with approaches for achieving impact. The challenge for U.S. strategists is that maintaining the advantage over America's adversaries will be a costly and complex endeavor. While winning the counterterrorism fight could be done reasonably well with set resources, this is not the case for strategic competition, a decades-long effort potentially on the scale of the Cold War.

KEYWORDS
strategy,
irregular warfare,
special operations,
strategic competition,
national security,
defense policy

In a new era of strategic competition, U.S. Special Operations Command (USSOCOM) must identify opportunities to outcompete China and Russia where and when it is most crucial, maintaining the U.S. technical edge and strategic advantage. USSOCOM needs a foundation for strategy and policy, along with approaches for achieving impact.

The future operating environment will be shaped by expansionist peer and near-peer adversaries, greater strategic competition among rival states, and emerging technologies. China and Russia are seeking to expand their global influence, transnational terrorist groups continue to maintain a presence in critical regions, and emerging technologies are shaping the environment in new ways.

Winning means successfully prevailing in the gray zone—below the level of armed conflict. However, USSOCOM's role extends beyond the gray zone; U.S. Special Operations Forces (SOF) must be ready to fight and win in support of partner nations and U.S. interests.

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The challenge for U.S. strategists is that maintaining the advantage over America's adversaries will be a costly and complex endeavor. While winning the counterterrorism fight could be done reasonably well with set resources, this is not the case for strategic competition—a decades-long competition and defense mobilization potentially on the scale of the Cold War. Strategists should focus on vital U.S. national interests while identifying the critical geographic regions and strategic assets—those that advance progress toward the 'ends' U.S. strategy seeks to accomplish.

USSOCOM can improve prospects for success. At the very least, USSOCOM can:

1. Identify geographic regions and assets of strategic value and place data in strategic context for leaders.
2. Set U.S. policy on gray zone competition and develop expertise.
3. Leverage strategic reviews and net assessments.

Prioritizing key geographic regions and assets according to their intrinsic strategic value will position SOF to outcompete China and Russia where it is needed most—whether for maintaining a strong posture in the gray zone, successfully deterring the outbreak of armed conflict, supporting U.S. allies, or preparing for future conflict with China and Russia. Strategists will gain a clear understanding of where it is most important to fight and win.

Better interpreting and contextualizing data and dashboards on strategic competition is vitally important. At a fundamental level, this means understanding how data and dashboard displays relate to U.S. national interests, grand strategy, and leadership decisions. Ideally, these displays and information feeds will differentiate top priorities from lesser concerns—making it clear where SOF must confront adversaries and what is at stake.

USSOCOM also needs to set policy on strategic competition in the gray zone—further defining acceptable competition for economic influence, natural resources, rare earth reserves, and control of global supply chains. A clear paradigm will better advance U.S. policy involving interagency and foreign partners. USSOCOM has already taken the initiative to develop expertise on strategic competition and escalation dynamics in the gray zone, improving prospects for success.

Finally, strategic reviews and net assessments will be crucial to success. Within this domain, the concept of return on investment is central—because strategy, at its core, involves choices about how to apply available resources to achieve desired ends. This will be critical for a potentially decades-long era of strategic competition that could draw down resources.

Overall, USSOCOM establishes the ends strategy strives to accomplish, characterizes the strategic setting, and selects the means to achieve desired ends. The process remains iterative, with strategic reviews and net assessments offering the opportunity to adjust strategy over time.

Finite Resources

America's resources are finite. Without a focus on key threats and high-value strategic assets, the U.S. will incur high costs in a new era of strategic competition. One can imagine several suboptimal outcomes:

- In the first scenario, the U.S. maintains the strategic advantage and technical edge, but at far higher cost than necessary.
- In the second scenario, the U.S. maintains the strategic advantage but fails to actualize this favorable posture to achieve America's global objectives.
- In the third scenario, U.S. resources applied to strategic competition have limited impact—resources that could have been better applied to rapidly acquiring new technology or fostering innovation.

In each scenario, America demonstrates limited strategic imagination, focusing on competing across all dimensions of national power instead of taking a transformative approach that leverages known patterns of adversary behavior and strategic culture. A resource-driven approach can only achieve so much. Policymakers often assume that by applying resources, a nation-state can achieve proportionate strategic impact; however, flawed assumptions can limit success.

In the gray zone, with no intrinsic start or finish, the U.S. risks a baseline level of expenditure without a guiding strategy—a situation with high potential for wasted resources. Ultimately, a lack of prioritization could lead to endless resource drain—possibly on the scale of the Cold War.

By competing with China and Russia globally without a clear hierarchy of objectives, the U.S. risks missing the opportunity to intensify resource application in vital regions where gray zone wins are imperative and additional resources mitigate risk. National security strategists can benefit from a clear starting point for crafting strategy in this new era—where counterterrorism remains essential but is no longer USSOCOM's primary mission, and advancing strategic competition becomes the priority.

USSOCOM in a New Era

Focusing on first-order U.S. national security interests enables strategists to develop useful end states when crafting SOF strategy. USSOCOM leadership has emphasized innovation, strengthening alliances, and excelling in the gray zone.[1] USSOCOM must also prepare for conflict, including aggression against U.S. allies or international partners, such as Ukraine. SOF's role in deterring great power rivals includes collecting intelligence, preparing the environment, and building strong partnerships.[2] The U.S. seeks to maintain its strategic advantage and technical edge over Russia and China while integrating deterrence and supporting allies. These efforts take place below the level of armed conflict but also above it, should adversaries seek to initiate hostilities, further escalate, or set the stage for a broader conventional war or nuclear conflict.

Ultimately, the development of SOF capability must align with the National Security Strategy (NSS), the National Defense Strategy (NDS), and White House policy.[3] Table 1 (Objectives in a New Era) summarizes the aims of the U.S. strategy. These goals are consistent with the National Defense Strategy (NDS). Aligning SOF activities with this structure clarifies the strategic trade-offs when choosing between resource allocations, force postures, or SOF capabilities.

With these objectives and end states established (as shown in Table 1), strategists must evaluate the relative value of focusing efforts to the left or right of the boom and the

associated risk tolerance of each choice. As USSOCOM strives to counter China, strategists must carefully balance resources devoted to gray zone competition, conflict deterrence, or preparation for large-scale conventional war—without certainty that competition will remain in the gray zone indefinitely.

The Future Operating Environment

Strategists must size up the future operating environment—where SOF must fight and win. Understanding the regional dimensions of this environment will be particularly critical, and identifying U.S. strategic priorities by region is an excellent starting point.[4] The 2022 NDS makes clear that a major U.S. defense priority will be "deterring aggression, while being prepared to prevail in conflict when necessary, prioritizing the PRC challenge in the Indo-Pacific, then the Russia challenge in Europe."[5]

Fundamental shifts are taking place in the structure of the international system, as prospects for a unipolar system guided by U.S. hegemony are diminishing. Some anticipate an increasingly multipolar world order, as Russia and China seek to exert political, military, and economic power and influence globally to attain the strategic and technical edge.[6] Changes are overtaking other realms; observers predict large shifts in human geography, including greater migration, humanitarian crises, and increasing political instability. External trends like climate change will introduce unexpected challenges. Finally, advances in technology will shape the nature of strategic competition among rival great powers, each seeking to develop or maintain the technical edge.

Objectives in a New Era
U.S. Advances Vital National Interests The U.S. secures vital national interests and maintains the American way of life, including democratic governance and a free civil society. The U.S. advances national goals as outlined in the 2018 and 2022 National Defense Strategies (NDS), emphasizing commitments to allies and partners, countering rival great powers in critical domains, and maintaining a strategic advantage. This includes deterring armed conflict, building robust integrated deterrence, and ensuring the capability to prevail in conflict with China in the Indo-Pacific or Russia in Europe.
U.S. Denies the Adversary In a new era of strategic competition, the U.S. denies adversaries: • Victory below the threshold of war (in the gray zone). • Victory through armed conflict (beyond the gray zone). • Victory through escalation to a large-scale conventional war or a nuclear conflict (beyond the gray zone).
U.S. Maintains the Strategic Advantage The U.S. maintains a global strategic advantage by successfully contesting adversary power projection and securing strategic assets in critical theaters. This ensures the ability to prevail in future conflicts when and where needed most. The U.S. counters rival great powers, limiting Chinese and Russian efforts to project global military, political, and economic power at the expense of U.S. interests and regional security. Additionally, the U.S. prevents

adversaries from gaining access to military bases, ports, strategic trade routes, rare earth reserves, and other assets of strategic value. The U.S. maintains a technical edge over adversaries, countering their exploitation of emerging technologies.
U.S. Deters the Outbreak of Armed Conflict | The U.S. deters the outbreak of armed conflict, recognizing that this protects allies and vital interests abroad. More importantly, it recognizes that war among great powers, particularly escalation, presents an unacceptable risk.
U.S. Support to Partner Nations Deters Aggression | U.S. military strength dissuades adversaries from aggression against allies and partners. With a commitment to protecting these nations, adversaries like China and Russia are deterred from resorting to conventional or nuclear conflict above the gray zone.
U.S. Integrated Deterrence Achieves Results | U.S. integrated deterrence precludes large-scale conventional war or nuclear conflict. It limits the potential for a nuclear arms race or the development of technologies that could disrupt the nuclear balance or incentivize adversaries to consider using nuclear weapons.
U.S. Maintains the Technical Edge, Preserving America's Ability to Fight and Win | The U.S. competes with Russia and China in research, development, testing, and evaluation (RDT&E), maintaining a decisive technical edge. This ensures the ability to prevail in armed conflict or other forms of warfare, including cyber war.[7]

Table 1: Objectives in a New Era [8]

As Russia and China compete with the U.S., they will leverage technologies designed to bolster state security and counterterrorism. Smart Cities and Safe Cities initiatives, which include biometric and identity technologies, impose some limitations on U.S. activities, particularly in urban areas. USSOCOM must grasp how technology will shape the future of war and the nature of strategic competition. Broadly, SOF can expect to operate in denied environments[9] and will likely observe changes in how strategic competition unfolds in the gray zone.[10] Meanwhile, USSOCOM also needs to become increasingly integrated with the Joint Force. At the outset of this new era, SOF must ensure interoperability with conventional forces—as well as identify the geographic regions or types of operational environments most likely to require seamless integration with conventional forces to win on the battlefield or in the gray zone. As theorists of special operations have noted, concepts of special operations have evolved over time.[11] The present moment is critical for understanding how boundaries between SOF and conventional forces may be changing and for determining the missions, authorities, and capabilities these new challenges require.

The Joint Operating Environment 2035 identifies features of the operating environment that will introduce new challenges for SOF and the DoD: violent ideological competition; threatened U.S. territory and sovereignty; antagonistic geopolitical balancing; disrupted global commons; contest for cyberspace; and shattered and reordered regions..[12] To sum up, considerable change is taking place, bringing unpredictable developments in world affairs—Russian military losses in Ukraine, as a recent example. SOF's shift to strategic competition and the scaled-back counterterrorism (CT) mission are situated within this broader context. New challenges will abound.

Applying SOF Capabilities

SOF dedicated to Direct Action (DA) will continue to excel in this role; meanwhile, the enterprise will shift to a new focus on countering Russia and China. While placing renewed emphasis on maritime capabilities and technology, the broader objective will be a full return to the range of capabilities employed before the global war on terror. Ultimately, as the new era unfolds, several SOF core activities may take on a greater role.[13]

Security Force Assistance, Foreign Internal Defense. USSOCOM continues to emphasize the importance of supporting partner nations and U.S. allies.[14] Security Force Assistance (SFA) and Foreign Internal Defense (FID)[15] support allies while helping to maintain U.S. access, placement, and influence.[16] Each core activity plays an important role in developing host nation capability to counter internal threats or defend against rival states. These activities also demonstrate U.S. resolve in support of allies, deterring adversaries from initiating armed conflict. They may also dissuade rival states from engineering a "fait accompli" in the gray zone.[17]

Countering Weapons of Mass Destruction (CWMD). USSOCOM should prioritize efforts to counter state and non-state attempts to acquire, develop, and deploy high-consequence chemical, biological, radiological, and nuclear weapons. Monitoring proliferation by China and Russia may become a greater focus. The U.S. may also seek to limit the diffusion of Chinese and Russian capabilities to non-weapon states or state sponsors of terrorism.[18] Securing high-risk materials, technologies, and expertise—particularly in regions experiencing violent extremist activity and accelerated competition with near-peer adversaries—would address critical challenges. Concerns persist about high-risk material in Ukraine following the 2022 Russian invasion and passage through Chernobyl and Zaporizhzhia.[19]

Civil Affairs. Special Operations Forces on Civil Affairs teams help build robust civil societies through interaction with community-level organizations and non-governmental groups. With language skills appropriate to their area of expertise, they often operate with considerable freedom of action. In addition to preparing the future operating environment, SOF can build resilience against Russian or Chinese aggression and create friendly networks in advance of anticipated armed conflict. Certain civil affairs initiatives can reach key interest groups in critical regions.[20]

Military Information Support Operations (MISO). The U.S. can leverage MISO for strategic effect in priority geographic regions[21]—targeting key populations whose changing perceptions could have a significant impact on altering the operating environment to U.S. advantage.[22] With expansive reach across the digital domain and at relatively low cost compared to other core activities, MISO offers opportunities to counter China and Russia in innovative ways. Ultimately, the deciding factor for any MISO campaign will be its capacity to generate strategic impact.[23]

Humanitarian Assistance and Disaster Relief (HADR). U.S. humanitarian assistance and disaster relief (HADR) delivers critical aid to populations worldwide while advancing U.S. interests, such as promoting the rule of law, human rights, and stable democratic governance. Humanitarian assistance is another realm where the U.S. and SOF can outcompete Chinese and Russian bids for global influence—strengthening partnerships with U.S. allies in critical regions or limiting the radicalization of vulnerable populations.

Preparing the Environment. USSOCOM leadership continues to stress the value of SOF in preparing the environment for future armed conflict—an established role dating back to the Office of Strategic Services (OSS).[24] Surveillance and reconnaissance can generate intelligence on the future operating environment—vitally important in advance of conflict. Efforts to prepare the environment might also include a cyber component. Operating effectively in a new 5G environment will be crucial—not only for countering Violent Extremist Organizations (VEOs) but also for competing with Russia and China. Preparing the environment also supports USSOCOM's CWMD mission through partner capacity building or direct action.[25]

Counter Threat Finance. The U.S. can leverage sanctions and trade policy. The efficacy of sanctions during the Ukraine crisis to limit Russian aggression is a useful test case that may galvanize greater global cooperation. As the lead DoD component for synchronizing CTF activities, USSOCOM is well-positioned to bring these capabilities to bear.[26] USSOCOM leadership has noted the usefulness of leveraging U.S. CTF capabilities not only as a non-kinetic, finish-agnostic counterterrorism win but also in strategic competition with Russia and China.[27] For enforcing sanctions, SOF has a longstanding role in high-risk Visit, Board, Search, and Seizure (VBSS) operations.

Emerging Technology. USSOCOM proactively identifies and counters technical challenges in the future operating environment.[28] With a record of success in rapidly fielding technology solutions, USSOCOM is well-equipped.[29] It has prioritized[30] developing communications technology for austere environments[31] and new approaches for operating successfully under adversary radars.[32] Additional challenges include developing options to defeat biometric systems integrated with adversary technology, including Smart Cities. Broader security vulnerabilities associated with the global expansion of 5G technology also pose concerns. To fully adapt and succeed in a new era of strategic competition, both the DoD and USSOCOM must compete with Russia and China across technical domains identified in the 2018 and 2022 NDS.

Key Topics in a New Era

Fortunately, the U.S. can improve prospects for success. At the very least, policymakers can (1) focus on discerning strategic value, (2) set U.S. policy on gray zone competition and develop expertise, and (3) leverage strategic reviews and net assessments.

Strategic Value

Regions and Assets. Prioritizing key geographic regions and assets according to their intrinsic strategic value will position SOF to outcompete China and Russia when and where it is needed most—whether for maintaining a robust posture in the gray zone, successfully deterring the outbreak of armed conflict, supporting U.S. allies, or preparing for future conflict with China and Russia. For strategists, this represents an opportunity to truly understand where and over which gray zone strategic assets it is most important to "fight and win."

Data and Dashboards in Strategic Context. Better interpreting and contextualizing data and dashboards on strategic competition is vitally important. Doing so requires an understanding of U.S. national interests, grand strategy, and foreign and defense policy

priorities at regional and country levels—as well as the hierarchical concepts of strategic value just noted. Experts well-versed in these concepts can be found across the interagency, including in the Offices of the Secretary of Defense, the National Security Council, the Department of State, and U.S. embassies overseas. Their joint expertise is rarely leveraged systematically to interpret changing levels of political, economic, and military power in the gray zone as China and Russia expand their global influence. In written form, the NDS, various regional strategies and campaign plans, and embassies' mission strategic plans provide invaluable guidance. The more strategists at all levels of government can develop a common framework to place data in strategic context, the better. This approach synchronizes understanding across the interagency, enabling strategists to quickly identify and respond to new trends that pose serious concerns.

Gray Zone

Set Policy on Strategic Competition in the Gray Zone. USSOCOM would be wise to further define acceptable competition in the gray zone, particularly regarding economic influence, natural resources, rare earth reserves, and control of global supply chains.[33] Clarifying the extent of U.S. government activities in this realm, including SOF's role, would be highly advantageous. Beyond that, specifying when SOF should or should not take specific actions to support U.S. interests would provide valuable guidance. A clear vision for top priorities and specific conditions—including adversary advances or economic exploitation—that merit the use of SOF would greatly benefit leadership, strategists, and operators.

Develop Expertise on Strategic Competition and Escalation in the Gray Zone. Better understanding the gray zone is already a priority for USSOCOM and the Joint Special Operations University (JSOU); many scholars are also writing on these topics. USSOCOM must improve its understanding of escalation potential at the limits of the gray zone. Additionally, it should prioritize better evaluation, influence, and assessment of victory in ongoing competition below the threshold of war—a challenging task with no clear start or end date for analytic assessments. The emphasis on the gray zone has arisen in response to China's surprising success in accumulating influence through long-term efforts involving private citizens, overseas diplomats, and economic interests abroad.

Strategic Reviews and Net Assessments

Return on Investment. Success requires analysis of resource allocation and return on investment. This is not pure strategy but rather strategy translated into resource allocation. Solving or optimizing the resource challenge would greatly enhance the likelihood of success, given the massive resources required to counter both Russia and China on a global scale over several decades.

Success of the Strategy. Taking a hard look at the strategy's level of success is essential. To foster this, leaders must remove organizational obstacles to sound analytic assessments and provide appropriate settings for innovation—approaches SOF has already established. Even so, evaluations that pose new questions about strategic impact can add significant value.

Evaluating Strategy

When evaluating strategy, the key is to have a broad set of questions that can show how well the strategy is achieving the desired ends—and to course-correct as needed.

Key Questions. Policymakers will benefit from developing a robust and varied set of questions that give strategists and practitioners the latitude[34] to directly address uncertainty—taking into account important considerations about which no data is available, but which nonetheless regularly factor into leadership decisions.[35]

One starting point would be to consider whether the strategy advanced DoD's effort to achieve NDS-level objectives for strategic competition. These objectives are shown in Table 3 (*Did the Strategy Achieve its Ends?*). Similarly, strategists might evaluate the extent to which SOF advanced specific lines of effort called for in the *Special Operations Forces Vision and Strategy*, while limiting the risks identified for USSOCOM to avoid. These considerations are detailed in Table 4 (*SOF Vision and Strategy: Evaluation*) and Table 5 (*SOF Vision and Strategy: Risks*).

Hierarchy of Objectives. Establishing a hierarchy of strategic objectives will be crucial. USSOCOM should identify the highest-priority "wins" across each combatant command—"no-fail" missions that deliver strategic impact, without which U.S. national security at the regional level would suffer critical setbacks. These can be differentiated from objectives of lesser importance. In the gray zone, this means understanding the value of maintaining the strategic advantage across different dimensions of national power—not only identifying the highest priorities but also comparing the relative efficacy of wielding each.

Demarcating the Arena for Strategic Competition. USSOCOM will benefit from delineating the key challenges of contesting adversaries (1) in the gray zone, (2) after the outbreak of armed conflict, and (3) after the escalation to large-scale conventional war or nuclear conflict. These zones are shown in Table 2 (*Arena for Strategic Competition*). Strategists should specify SOF's role in each zone, quickly identify NDS and USSOCOM strategic objectives, and allocate resources to apply as a means to these ends.

Regional Analysis. Taking the additional step of integrating frameworks and objectives of subsidiary U.S. government (USG) strategies and plans at the regional and country levels will add value. This is a useful approach to synchronize the wide range of USG and partner nation priorities, a crucial first step for effective cooperation.

Arena for Strategic Competition	Purpose
Gray Zone	Deny adversary victory in the gray zone
After the Outbreak of Armed Conflict	Deny adversary victory after the outbreak of armed conflict
Further escalation to large-scale conventional war or nuclear conflict	Deny adversary victory through further escalation to a large-scale conventional war or a conflict involving nuclear arms

Table 2: Arena for Strategic Competition

To Conclude: Achieving Success in a New Era

To succeed in a new era of strategic competition, USSOCOM must establish the ends its strategy strives to accomplish, characterize the strategic setting, and select the means to achieve desired ends. USSOCOM must articulate the strategic value of U.S. access, placement, and influence across geographic regions based on broader U.S. national security priorities outlined in the NDS. Discerning the strategic value different policy options offer for U.S. national security will be invaluable.

For example, as USSOCOM seeks to gain the strategic advantage, events will unfold that advance U.S. interests to varying degrees and through different forms of national power. These could include gaining access to ports vital to global trade, investing in global markets important to U.S. national security, strengthening diplomatic ties with key partners, or maintaining a productive role in a regional security organization that supports partner nations and advances U.S. interests. Developing a keen ability to compare strategic value across forms of national power will be especially advantageous.

Even more importantly, USSOCOM must embark on a new effort to place data and dashboards in strategic context in a way that enables strategists and commanders to weigh all critical considerations and make sound decisions that shape the operating environment to their advantage. This involves recognizing that data will not exist for many factors leaders must consider when making vitally important decisions in the gray zone and on the battlefield. Finally, USSOCOM must prioritize conducting strategic reviews and net assessments that take a hard look at whether a strategy has achieved its ends.

Evaluating Strategy

Topics for Strategic Review	Description
Vision: U.S. Advances National Interests	The U.S. secures vital national interests and maintains the American way of life, including democratic governance and a free civil society. It advances national interests and goals as described in the 2018 and 2022 NDS. This includes a commitment to allies and partners, countering rival great powers in critical realms, and maintaining the strategic advantage over adversaries, including in direct conflict with Russia and China.

Maintain the Strategic Advantage	The U.S. sustains its strategic advantage globally by successfully contesting adversary power projection and securing strategic assets in theater—preserving the ability to prevail in future eras when and where it is most needed. The U.S. counters rival great powers, limiting Chinese and Russian efforts to project military, political, and economic power globally at the expense of U.S. interests and regional security. It prevents adversaries from gaining access to military bases, ports, strategic trade routes, or other assets of strategic value. Additionally, the U.S. maintains its technical edge over adversaries and effectively counters their exploitation of emerging technology.
Deter the Outbreak of Armed Conflict	The U.S. deters the outbreak of armed conflict, recognizing that doing so protects U.S. allies and vital interests abroad. More importantly, it acknowledges that the outbreak of war among great powers, let alone further escalation, poses an unacceptable risk.
Offer Support to Partner Nations that Deters Russian or Chinese Aggression	The U.S. demonstrates its commitment to protecting allies and international partners, leveraging its military strength to dissuade adversaries from aggression. As a result, China and Russia are deterred from resorting to conventional or nuclear conflict beyond the gray zone.
Successfully establish integrated deterrence to limit escalation to conventional war or nuclear conflict	U.S. integrated deterrence succeeds in precluding the emergence of large-scale conventional war or nuclear conflict. It limits the development of a nuclear arms race or technologies that could radically alter the nuclear balance and incentivize adversaries to consider the use of nuclear weapons.
Maintain the technical edge, preserving America's ability to fight and win	The U.S. competes with Russia and China in research, development, testing, and evaluation (RDT&E), authoritatively maintaining the technical edge. This ensures the U.S. military can prevail in an armed conflict or other forms of conflict, such as cyber warfare.[36]

Table 3: Did the Strategy Achieve its Ends?

To what extent did …
SOF support priority missions in critical locations as part of integrated deterrence?
SOF reduce strategic risk?
SOF facilitate integration with conventional forces during high-end conflict?
Changes to concepts, capabilities, and doctrine add unique value to integrated deterrence?
A talented workforce enable SOF to innovate, compete, and win?

Newly improved readiness better enable SOF to execute critical missions (e.g., crisis response missions, priority CT missions, CWMD missions)?
SOF use Information Warfare capabilities in deterrence campaigns?
SOF support the Joint Force in high-end conflict?
New or stronger partnerships increase global understanding, bolster deterrence, and create opportunities for shared successes?

Table 4: SOF Vision and Strategy: Evaluation

To what extent did SOF avoid …?
Loss of access, placement, or influence in critical areas of operation or with key partners or organizations?
Budgetary shortfalls that directly affect the development or advancement of critical capabilities?
Degradation of agreements and relationships with critical partners that impact shared strategic awareness and operational effectiveness?
Insufficient investment in force development and design, failing to yield necessary SOF capabilities?
Authority shortfalls or gaps limiting SOF's ability to support national security interests?
Force structure or posture that is insufficient or misaligned with achieving SOF's strategic aims?
Loss of trust in SOF by decision-makers and the American people to manage resources, prepare the environment, or execute priority missions ethically in politically sensitive environments?

Table 5: SOF Vision and Strategy: Risks

Annex

5G in the Future Operating Environment

Cellular 5G networks provide greater access to data and faster browsing, but they also pose security concerns in the future operating environment.[37] This occurs partly because more data resides closer to the user. As China and Russia expand into new geographic regions, they gain increasing access to data transmitted on local 5G networks. The establishment of 5G networks also means a greater number of users across broader geographic areas have access to the digital domain, creating new markets. Chinese giants like Huawei have capitalized on these opportunities, increasing their global market share, power, and influence. China's global infrastructure development campaign extends to its *Digital Silk Road Initiative*, a recent effort to expand Chinese influence alongside enhanced network connectivity and digital infrastructure.

While not specific to 5G, it is important to note that both SOF and adversaries like Russia and China are equipped to compete in the cyber realm. Russian hacking and cyber operations are expansive and remain a major concern for NATO countries like Estonia,

which suffered a significant network outage due to Russian hacktivists. Currently, the full extent of how adversaries exploit—or might exploit—security vulnerabilities in 5G networks is unknown. However, such activities could shape or limit how the U.S. operates in the digital domain. Understanding the implications of 5G and the *Digital Silk Road Initiative* remains advantageous for SOF.

Safe Cities

With the expansion of the digital domain, 21st-century cities increasingly turn to technology solutions to organize and secure their municipalities. Chinese tech giant Huawei is a leading provider of Safe City technology. In these cities, police and first responders are connected in real time, improving responses to emergencies, natural disasters, and crime.[38] Safe Cities increasingly incorporate a digital identity dimension, enabled by widespread cameras and biometric technology that screen and track citizens.[39]

While reductions in crime are welcome, these innovations can be a double-edged sword. Experts in Western countries continue to voice concerns about privacy and civil liberties, as well as the growing power of municipal authorities and the nation-state. Biometric technology and next-generation tracking enable ubiquitous technical surveillance (UTS), allowing states to precisely identify citizens as they move throughout the city. [40]

This persuasive surveillance of urban environments presents an important challenge for SOF, which must operate in these spaces in the coming decades. Chinese tech giants like Huawei actively market Safe City technology to regions where they are developing greater diplomatic, military, and economic footholds. As a result, SOF will face increased difficulty operating clandestinely in urban environments—whether establishing a presence, preparing the environment, or conducting kinetic operations. As a result, SOF will face increased difficulty operating clandestinely in urban environments—whether establishing a presence, preparing the environment, or conducting kinetic operations.

Denied Environments

Fully understanding the future operating environment involves understanding the technical challenges of operating in denied environments. Fully understanding the future operating environment involves grasping the technical challenges of operating in denied environments. As Russia and China seek to exert greater influence in new regions, their military presence can create increasingly denied environments. Therefore, the U.S. would be wise to identify strategic regions and modes of action to preserve—well in advance of Chinese or Russian encroachment.

There are several notable technical features of an adversary-controlled environment. In general, this is likely to mean a future operating environment where the U.S. and its allies must contend with challenges including.

- Radar jamming technology

- GPS-denied environments
- Integrated Air Defense Systems (IADS)
- Anti-access/area denial (A2/AD) systems

Developing a robust understanding of the resultant operational constraints, in consultation with technical experts, would be highly advantageous.[41]

The Information Environment

Adversaries also shape the future operating environment by controlling or influencing the information environment. This ranges from formal information operations—where non-democracies like China and Russia hold an advantage—to less formal cultural campaigns or public affairs initiatives. Adversaries may also have the power to curtail the information space, depending on the extent of their control; for example, they may limit access to the open internet or encroach on freedom of the press. Within the broader information environment, adversary MISO are a topic of considerable interest to U.S. strategists. In general, it will be crucial to understand the overall strategy of adversaries' MISO efforts and their practical application by region or country. The cyber domain, also linked to the broader information environment, may also be contested. In a new era of strategic competition, MISO—especially in the digital realm—has unique reach for targeting adversaries and their proxies anywhere around the globe, often at relatively low cost.

Endnotes

[1] U.S. Congress, Senate Armed Services Committee, Statement for the Record by Acting Assistant Secretary of Defense for Special Operations and Low-Intensity Conflict, 25 March 2021.
[2] U.S. Congress, House Subcommittee on Intelligence and Special Operations, Statement for the Record, 21 July 2021.
[3] "Fact Sheet: 2022 National Defense Strategy," Department of Defense, 28 March 2022; Summary of the 2018 National Defense Strategy: Sharpening the American Military's Competitive Edge, Department of Defense, 2018.
[4] Jeffrey Becker and John DeFoor, "Exploring the Future Operating Environment," *JFQ* 89, 2nd Quarter 2018; Future Operational Environment: Forging the Future in an Uncertain World, 2035-2050, U.S. Army Futures Command, AFC PAM 525-2.
[5] "Fact Sheet: 2022 National Defense Strategy," Department of Defense, 28 March 2022.
[6] Joint Concept for Integrated Campaigning, 16 March 2018; Kimberly Amerson and Spencer B Meredith III, "The Future Operating Environment 2050: Chaos, Complexity, and Competition," *Small Wars Journal*, 31 July 2016; Jim Thomas and Christopher Dougherty, *Beyond the Ramparts: The Future of US Special Operations Forces* (Washington DC: Center for Strategic and Budgetary Assessments, 2013).
[7] This is a massive and long-term effort designed to ensure that the US can deter future wars—or win if conflict cannot be averted.
[8] This table reflects goals outlined in the NDS, in USSOCOM Congressional Testimony and official documents such as the Special Operations Forces Vision and Strategy, which is available at: https://www.socom.mil/sof-vision-and-strategy.
[9] USSOCOM leadership has remarked on the increasing prevalence of denied environments. For example, General (Ret.) Clarke recently made a comparison between (1) the recent U.S. raid in Syria targeting a leader of ISIS, and (2) the raid on UBL in Pakistan several years earlier. General (Ret.) Clarke remarked that the mission in Syria proved far more challenging, simply because navigating Russian-controlled Syrian air space introduced new challenges above and beyond what SOF had faced for Neptune Spear, the raid on UBL in Pakistan. Furthermore, in Syria, the greatest challenge was not the direct action portion of the mission, but rather navigating Syrian airspace without detection.
[10] Joint Concept for Integrated Campaigning, Joint Chiefs of Staff, U.S. Department of Defense, 16 March 2018.
[11] Tom Searle, *Outside the Box: A New General Theory of Special Operations* (Tampa: JSOU Press, 2017), JSOU Report 17-4; Joe Osborne, "Advancing a Strategic Theory of Special Operations," *Small Wars Journal*, 16 May 2016; Richard Rubright, A Unified Theory for Special Operations (Tampa: JSOU Press, 2017), JSOU Report 17-1; Peter McCabe and Paul Lieber, eds, *Special Operations Theory* (Tampa: JSOU Press, 2017), Vol. 3 of 3, JSOU Report 17-6; Eric Olson, "USSOCOM and SOF: Ward Around The Edges," *Journal of National Security Law & Policy*, Vol. 12:71 (71-80), 2021.
[12] The Joint Operating Environment 2035: The Joint Force in a Contested and Disordered World, Joint Chiefs of Staff, US Department of Defense, 14 July 2016.
[13] Stew Magnuson, "SOFIC NEWS: Special Operations Command Turns Attention to Indo-Pacific," National Defense, 15 May 2022.
[14] Jim Thomas and Christopher Dougherty, Beyond the Ramparts: The Future of US Special Operations Forces (Washington DC: Center for Strategic and Budgetary Assessments, 2013).
[15] Security Force Assistance (SFA) and Foreign Internal Defense (FID) initiatives include a wide variety of military exercises, training and capacity building partnerships, including well established programs like Joint Combined Exchange Trainings (JCETs).

[16] Troy White, Growing SOLO: Expanding the Spectrum of SOF Advisory Capabilities (Tampa: JSOU Press, 2018); Stephen Biddle, "Does Building Partner Military Capacity Work?" Irregular Warfare Podcast, 19 June 2020.

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[20] Travis Clemens, Special Operations Forces Civil Affairs in Great Power Competition (Tampa: JSOU Press, 2020), JSOU Report 20-4.

[21] MISO can also shape the view of mission critical target audiences in a variety of settings—primarily at the tactical level. A primary objective is simply to identify, at the regional level, how near peers are shaping the information environment via MISO. Fully leveraging expert knowledge of the 'Digital Silk Road' for example, ought to be a primary line of effort. As resources are available, the U.S. should seek to counter adversary MISO that could have strategic effects throughout the region, or decisively define the future operating environment in ways disadvantageous to the United States.

[22] Thomas Rid, *Active Measures: The Secret History of Disinformation and Political Warfare* (New York: Farrar, Straus and Giroux, 2020); "Information Operations for the Information Age: IO in Irregular Warfare," Irregular Warfare Podcast, 24 September 2021.

[23] In the regions, the first step toward countering near peer adversaries seeking to bring about a fait accompli in the gray zone is to take note of Chinese and Russian attempts to shape the information environment, that is, all adversary MISO. The information environment can be a crucial battleground—because dominating it enables an adversary to shape the perceptions of regional states and can induce them to bandwagon with regional hegemons if they believe that their US ally cannot deter aggression or wavers in resolve. Understanding the aim and effectiveness of adversary MISO is crucial; if adversary MISO has the potential for strategic impact, SOF may need to consider developing US MISO initiatives designed to discredit it.

Even so, the US as a democracy generally lacks the acumen of its adversaries in conducting information operations—MISO being one way that the US can exert a presence in the information

space. Fortunately for the US, sharing accurate openly available information with populations around the globe often adds considerable value—especially when Russian and Chinese adversaries seek to obscure the truth.

[24] "Back to the Future: SOF in an Era of Great Power Competition," Irregular Warfare Podcast, 2 July 2021.

[25] General Richard Clarke, "The Future of Special Operations Forces," moderated by Michèle Flournoy, Aspen Security Forum, 4 November 2021.

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[31] SOFWERX is a platform designed to help solve challenging Warfighter problems at scale through collaboration, ideation, events, and rapid prototyping. Additional information available at: https://www.sofwerx.org/.

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[33] United States–China Economic and Security Review Commission Hearing on "US–China Competition in Global Supply Chains," 9 June 2022.

[34] Joint Doctrine Note. 1-15: Operation Assessment, US Department of Defense, 15 January 2015.

[35] The Joint Doctrine Note 1-15 is focused on Operation Assessment rather than strategy but has many useful and transferrable concepts, to include considerations at the strategic level, specific questions for assessment, and the use of data to shape leadership's understanding of the operational environment and guide decision-making.

[36] This is a massive and long-term effort designed to ensure that the US can deter future wars—or win if conflict cannot be averted.

[37] Graham Allison, Kevin Klyman, Karina Barbesino, and Hugo Yen, "The Great Tech Rivalry: China vs. the US," Belfer Center for Science and International Affairs, Harvard Kennedy School, December 2021; The 5G Ecosystem: Risks & Opportunities for DoD, Defense Innovation Board, April 2019.

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[41] Chris Dougherty, "Moving Beyond A2/AD," *CNAS*, 3 December 2020.

Want "Strategically Minded Warfighters?" Then Make "Intellectualism" a Military Value

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ABSTRACT
A common refrain whenever military leaders and policymakers are dissatisfied with military performance is to argue that Professional Military Education (PME) needs to change. Although education should never be static, blaming PME institutions for the military not achieving policy outcomes ignores deeper fundamental issues with how the military perceives and approaches education. If policymakers and national security leaders are serious about educating practitioners to be more effective, they must move away from the current episodic approach that is more focused on credentialing than intellectually nurturing. This article offers a critique of how the military approaches education and offers recommendations for changing the way PME is viewed and practitioners are educated.

KEYWORDS
irregular warfare, special operations, PME, practitioner education, intellectualism

For over a decade, U.S. military leadership has acknowledged inadequacy in how it intellectually prepares practitioners to face a dynamic and uncertain environment. Despite this acknowledgment, the persistent claim of a broken Professional Military Education (PME) system is proof of either an unresponsive PME or that PME is serving as a useful scapegoat to shield addressing other fundamental issues.[1] There is some truth in the former, but the latter is what has stifled change. Although it is convenient to solely blame PME institutions and their faculty, it is also unfair because it ignores organizational and cultural issues within the military that affect how education is perceived and incorporated into organizational and individual development, thus limiting its value. If the U.S. military wants to harness education to nurture the practitioner, they must appreciate the organizational and cultural issues that currently limit its utility.

First, military leadership must not only acknowledge the failure of an "episodic" approach but prioritize and resource recurring educational opportunities that complement

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the needed year-long educational experiences. Second, they must appreciate that, while practitioners require training and education, these are distinct and serve different yet complementary purposes. Finally, and most importantly, they must prioritize intellectual development to the same degree as physical fitness and incorporate "intellectualism" as a military value.

This article, co-written by an experienced Special Operations Forces (SOF) practitioner/leader (Obadal) and an academic/former practitioner (Oakley), first considers the necessity of educating the SOF practitioner in the current security environment.[2] Recurring education is essential for SOF practitioners considering SOF's mission and how leaders anticipate employing SOF in the current security environment.[3] Although this section focuses on the SOF practitioner, the need for recurring education to nurture the practitioner is not limited to SOF and the failure to adequately educate occurs in SOF and the broader military. The article then considers some of the organizational and cultural reasons why the military has been unsuccessful in exploiting education for the benefit of the practitioner. It concludes with recommendations focused not on PME content but on the need to adjust the way the military views education and how it integrates education in individual and collective development.

A SOF Leader's Perspective on the Security Environment and the Ingredients for a Successful Practitioner[4]

It is not a military secret that the attention of the Department of Defense shifted over the last few years to the strategic problems of Russian disruption and a rise in China's global status. In fact, unclassified strategic documents from the current and previous administrations demand that the Pentagon shift its focus towards strategic competition.[5] There is a departure from counterterrorism as the driving factor in almost every aspect of the military: force design, global posture, weapons development, and fiscal priority. We are trading V-shaped hulls for autonomous vehicles, close-quarters battle for cyber operations, and predator drones for satellite technology.[6] Further, there is widespread recognition among military professionals that the United States will struggle to achieve domain dominance, which over the last twenty years was arguably secured with logistical but no significant adversarial challenges.[7] The United States should be prepared to accept and overcome challenges such as the denial of air superiority through 5th generation fighters and advanced air defenses, disruptions in the maritime domain through unmanned subsurface vehicles and long-range missiles, sporadic space support due to jamming and counter-satellite capabilities, and challenges in the information domain driven by rapidly evolving policies and advanced programs. Further, Russia and China are working to move past unmanned systems by automating military platforms and actions, while the United States struggles to rectify its own ethics and morals regarding the lethal decision loop.[8]

Beyond technology, another currency in this strategic competition is global presence, providing influence and access. SOF are more and more often the "front-line" in this effort, thanks to two decades of expansion. Since 2001, U.S. Special Operations Command's numbers have doubled both in force structure and global deployments, with its

members currently in about 80% of countries around the world.[9] The partnerships, intelligence and influence they cultivate in these countries are essential to global competition, and critical if conflict breaks out. Leaders managing these relationships also navigate an environment rightfully controlled by diplomacy and intelligence professionals. Between their partnerships, their American counterparts, and Russian and Chinese presence, leaders must possess critical thinking and communications skills that surpass what standard military training or experience provides. They face situations not addressed in doctrine, partners not adherent to decision matrices, and adversaries utilizing highly unconventional means of competition.

For decades, the first "Special Operations Truth" remained intact: *Humans are more important than hardware*.[10] In special operations, humans are far less reliant on the latest weapons and platforms for very practical reasons. Employment of major weapons systems is not the mission of most special operations units. Certainly, they use the most advanced equipment they can, but these center on situational awareness, transportation, and precise lethal engagement and tend to be personal kit, not pacing items. Most core activities center on "human terrain" instead of actual terrain. Counterinsurgency, unconventional warfare, civil affairs, security force assistance, and information operations all rely heavily on human contact and require exceptional interpersonal interaction. Advanced hardware for special operators is important, but the weapon system itself is the individual – required to navigate ambiguous environments with a broad mission statement. Preparation for SOF employment is about ensuring the individual makes the right decision. Effectiveness is gained by *making good decisions in fluid human environments*.

As a special operations commander from major to colonel (Obadal), I never had my entire formation in one geographic location. Globally dispersed, my subordinate leaders spent 99% of their time making their own decisions. I relied on them to make sound decisions without direct or daily command oversight. Lack of effective communications and speed of decision requirements had much to do with this, a common issue (not problem) that special operations professionals encounter.

In the short periods of time that I could speak directly with my leaders, effectiveness was weighed by how well and quickly they could encapsulate numerous dynamic elements into a single coherent message that included: 1) the decision they made or the direction they were taking; 2) how they incorporated the views of other U.S. and multinational stakeholders in crafting a plan; 3) the risks associated with every option, including the risk of inaction; 4) how their decision fit into the larger operational and strategic goals of the task force, combatant command, and U.S. policy. These men and women were special operations non-commissioned officers, warrant officers, and mid-grade officers who we thrust into environments that sometimes drew on their training, but always demanded their critical analysis.

One of my non-commissioned officers served as our sole representative to the U.S. Embassy in an important regional partner which had suffered numerous terror-related setbacks and was enduring political upheaval. During one of my visits, senior civilian and

military officials on the country team lauded his performance and expressed the criticality of his input. This was unremarkable, as U.S. leaders in numerous countries commonly demonstrated appreciation for special operators working in embassies. What struck me was the soldier's own assessment. He attributed his success to his recently completed Joint Special Operations Master of Arts (JSOMA) program at National Defense University: "*Without the combination of education on the National Security process, and the focus on critical thinking, I'd be lost here.*"

While he would not have been completely lost, his point drives home the criticality of three elements: training, experience, and education. In special operations, education likely takes a higher priority than other military disciplines due simply to the environment and the increased need for critical thinking. Balancing it with training is not taking away lethality or readiness; in fact, it increases the ability of leaders to operate more effectively.

If leadership pronouncements and strategic documents identify the importance of PME and experienced leaders highlight the value of education for operational effectiveness; why do PME problems persist? Is it that PME institutions are not listening? Although PME is not perfect and there is room for improvement, we believe the fundamental issue is not PME but military culture, what it values, and how it incorporates education into individual and organizational development.

The Importance of Differentiating Between Training and Education

Although military leaders identify the need for "strategically minded warfighters or applied strategists," the decade-long deafening echo signals military leadership's assessment that they are not developing the practitioners required for success in the contemporary security environment.[11] This failure is partly due to a misappreciation of the purpose of education and a conflation of education with training.

Training is focused on the individual or unit—by design pointed inward to elicit a specific behavior in specific situations. Training is critical to effective military formations: without training, units and individuals would rapidly break down. At the tactical level, it drives behavior to employ weapons, move supplies, and achieve tactical objectives. At the organizational level, training allows senior leaders to understand the complex systems that drive military momentum—training on force structure, fiscal practices, and joint planning. Training prepares leaders to employ military tools in *combat* situations.

Education is focused outward, to elicit changing behavior based on an understanding of changing situations (or an appreciation of initial misunderstanding). At the tactical levels, education largely occurs through exposure. Consider a deployed unit months into a counterinsurgency deployment. They understand the population's behaviors, the enemy tendencies, and can better appreciate changes in the environment. Although this "learning by probing" or "learning by failure" will always occur, the lack of education prior to the deployment often makes overcoming ignorance disruptive and costly. At the higher levels, formal education provides senior leaders with the ability to critically break down

problems that involve factors far beyond the military's traditional optic. In other words, formal education prepares leaders to think critically in *every* situation.

The U.S. military's training approach does an excellent job of developing staff officers who can navigate the bureaucracy and technicians who can employ their weapon system and follow processes and procedures. Where it is found wanting is in nurturing critical thinkers who can assess the utility/limitations of force in specific socio-political environments, appreciate how those environments might respond to their actions, and assess the risk their actions potentially create.

Anyone who has served in the military appreciates that it values structure, processes/procedures, regulations, and doctrine. This is understandable for an organization that uses violence to achieve military conditions and asks people to unflinchingly put their lives at risk to orchestrate that violence. The military's technician mentality might be sufficient when the strategic environment is viewed through the dichotomy of war/peace and what is asked of the military is limited to the use of force to achieve clear military outcomes (e.g., destroy the opponent's army). The problem is, the U.S. military operates in complex and dynamic socio-political environments throughout the "spectrum of conflict" and its actions have effects beyond the opposition's military.[12] What is acceptable in the traditional war/peace dichotomy is irresponsible and dangerous in the "gray zone," as part of "strategic competition," when conducting "irregular warfare," or when attempting to "shape the environment" within a combatant command's area of responsibility.[13]

The military's training technicians culture often seeps into how the military views the role of education. For example, one of the authors has heard some refer to "just in time education" or experienced the calls for increasing "critical thinking" in PME curricula resulting in keyword searches to count the number of times "critical thinking" is present in syllabi. "Just in time education" is an adaptation of "just in time training" which focuses on providing the training at the moment the individual requires the skill.[14] Although "just in time education" is a catchy phrase, it completely ignores that education is about intellectually nurturing an individual and not providing last-minute training. "Just in time education" thinking is dangerous because it creates the impression that education is merely information needed now and not about developing attributes such as critical thinking, curiosity, empathy, and humility throughout an individual's career.

Although educators know "just in time education" is a platitude, sadly, it accurately describes the U.S. military's "episodic" approach to education where it provides ten months of "strategic education" circa the eighteenth year of a career. Given this "just in time education" approach, senior leaders should not be shocked by the dearth of strategic thinkers.[15] Is it surprising that individuals who achieved success focusing on technical acumen over nearly two decades of service cannot be rewired in a ten-month program? The astonishing thing is not that every war college/senior service college graduate is not transformed into a strategic thinker, but that some senior military leaders seem to expect such a transformation.

"Action is Achievement"

While training ensures the technician can perform their function, education is required for the professional to appreciate how the environment might respond to their action. One drawback of an overly technician mentality is a focus on the performance of the activity instead of adequately considering whether the activity might achieve the desired conditions, or the potential risks created in the environment by taking certain actions. This observation is not novel and was identified numerous times over the past two decades when the military failed to achieve its objectives in either Iraq or Afghanistan. Despite acknowledging, the military culture continues to focus more on "doing something" and rewarding action even if it is counterproductive to the ultimate goals.

The "action is achievement" culture somewhat highlights tension in the military where an attribute that is desirable in one situation is undesirable, counterproductive, and even dangerous in another situation. For example, "decisiveness" – which is essential when taking a hill or exploiting a tactical opportunity – can have disastrous consequences at the strategic level when actions are taken without sufficient thought to the secondary or tertiary effects. The problem is that military practitioners are inculcated with the belief that "decisiveness" is always good and anything not "decisive" is merely "indecisive" and is the result of poor leadership and performance. This leads to the practitioner embracing false certainty and penalizing anyone who admits ignorance or uncertainty even in an unfamiliar environment. This toxic mixture often results in rash decisions by ignorant practitioners when caution and thoughtfulness are required.

"Ivory tower nonsense" or "this academic stuff is too complicated"

A common refrain is that an academic subject is too complicated for practitioners to understand so we should avoid the topic and focus the curriculum on understanding our own organizations, processes, and procedures (i.e., building technicians). This view is condescending and underestimates the intellectual capabilities of practitioners. More importantly, it is ethically irresponsible because it sends unprepared practitioners into a dynamic and indeterminant world while asking them to "do something." Practitioners have been trained on the technical capabilities of their weapon system and how to employ it, but they have not been adequately educated to appreciate how the environment might respond to their actions.

Can you imagine if the medical profession said, "the brain is too complex so instead of trying to increase our understanding, we will train neurosurgeons to make perfect incisions and sutures." The "neurosurgeons" would still operate, but the focus on developing technicians who merely know how to use tools and not on neurosurgeons who understand the brain (or "environment") would result in corpses with perfect incisions. Some might think this is an extreme analogy, but our point is that it is irresponsible to accept the description of a "dynamic threat landscape," argue for a military role in competing on this "landscape," and then complain that military practitioners are incapable of understanding these complicated "landscapes."[16] If it is too difficult to understand, then

the military should remain "break in case of emergency" and not utilized to "shape the environment," "operate in the gray zone," or conduct ongoing irregular warfare campaigns.

Intellectualism is Not a Military Value

The U.S. military culture has long prided itself on physical "toughness" and rewards an individual who pushes through physical exhaustion to accomplish the mission. "Embracing the suck" is a figurative badge of honor that results in numerous war stories and alcohol-soaked tall-tales while the Army awards an actual badge to highlight the awardee's physical prowess. Physical training is a morning ritual in many military units where individuals are praised for physical perseverance. How much time do these units set aside for educating the practitioner to understand the strategic environment? How often are practitioners awarded for dedicating themselves to intellectual development? If physical challenges and accomplishments are embraced and rewarded, why is it not also acceptable to intellectually challenge practitioners and expand their limits? Why is it culturally acceptable to physically exhaust practitioners, but challenging practitioners intellectually is frowned upon? We are not arguing that physical readiness is not important, but we are arguing that intellectual readiness is at least as important. If the world is complex, dynamic, and uncertain, military practitioners must be intellectually prepared to face this environment.

The glaring discrepancy of prioritizing the physical over the intellectual is merely a sign of a more significant issue regarding the military and PME—the military does not value intellectualism. The case of anti-intellectualism in the military has been made many times, and although we believe there is merit to this argument, we are speaking about something different.[17] "Anti-intellectualism," according to Hofstadter, "is a resentment and suspicion of the life of the mind and of those who are considered to represent it; and a disposition constantly to minimize the value of that life."[18] Even if there is no "resentment" towards intellectuals in the military, the fact that none of the services identify "intellectualism," or something associated, as a value highlights "intellectual-apathy" at the least.[19]

Recommendations: Individual Education and Collective Education

Individuals should be rewarded for seeking intellectual growth opportunities and prioritizing the intellectual as much as the physical. Practitioners should be encouraged to pursue educational opportunities, provided time to do so (it should not be considered "time off," but an important part of their job), and rewarded for seeking intellectual nurturing. Leaders should incorporate collective education as part of their unit or staff development. One simple way is to devote as much time to collective intellectual activities such as guest speakers, book clubs, and classes as organizations do to physical fitness. Ideally, this should include collective unit educational activities where commanders bring their units together to discuss current events or hold discussions with outside experts. Beyond providing an educational opportunity, this will also highlight that leaders value continuous education and can also help establish a common understanding of the operational environment; something called for in doctrine, but seldom achieved in practice.[20] It will also help correct what some

perceive as "anti-intellectualism" in the military while saving all of us from having to hear leaders make light of education by quipping, "it is only a lot of reading if you do it." I doubt those leaders would ever say, "it is only a lot of running if you do it" or "it is only a lot of training if you do it."

Conclusion

There has been some positive evolution in how the military perceives education. For example, the JCS acknowledges the "episodic" approach to education is insufficient to develop the type of practitioner the nation requires.[21] Although this is a positive development, leaders must create climates that encourage individual education as part of professional development and institute collective educational opportunities as part of their unit's development. Although the formal educational opportunities the military offers are necessary and more generous than those provided by other federal government organizations, these "episodic" education opportunities are not sufficient to nurture the "critical thinkers" leaders say the security environment requires.

We believe the choice is straightforward, the military either prioritizes lifelong education for military practitioners and ensures commanders incorporate it into their unit schedules or the military becomes a "break in case of emergency" organization focused on achieving limited military objectives. If not, the U.S. military runs the risk of taking actions that make conditions worse because they do not understand the risk created by their actions. Making these changes will require adjustments to military culture and values, but failure to change will only perpetuate the current conditions that have leaders questioning the value of PME.

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Proxy Power and Precious Minerals: Russia's Growing Footprint in Africa through the Wagner Group

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ABSTRACT

Using the Central African Republic (CAR) and Mali as case studies, this article examines Russia's strategic use of the Wagner Group, a private military security company, to grow its influence in Africa through a transactional model of military support for access to mineral resources. In the CAR, the Wagner Group became integral to President Touadéra's security apparatus and secured access to key mining sites, as a result. In Mali, the Wagner Group's role evolved from counterterrorism support to a broader strategic presence as part of Russia's ambitions in the Sahel. The recent transition from the Wagner Group's shadowy mercenary activities to the state-backed Africa Corps under the Russian Ministry of Defense is a shift from irregular units toward conventional military engagement. This analysis contextualizes these developments within Russia's larger goal to counter Western influence in Africa and reshape global power dynamics through strategic resource partnerships and proxy forces.

KEYWORDS

Proxy warfare, private military security companies (PMSC), Wagner Group, Africa Corps, Russia, resource exploitation

Introduction

In the last decade, Russia has expanded its footprint in Africa by targeting resource-rich, conflict-ridden countries, using proxy forces like the Wagner Group to capitalize on the declining influence of Western nations. Reviving Soviet-era ties, Russia aims to weaken Western influence across the continent and gain support for a multipolar world order. Russian involvement in Africa is complex, with strategies varying based on each country's security dynamic. In many African countries, proxy forces such as the Wagner Group have offered military and security services in exchange for access to mining rights, land, and facilities. African nations are already endorsing Russia at key United Nations votes, making the effects of this alliance felt on the global stage. Wagner Group operations have also

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allowed Russia to sidestep international sanctions and insulate its economy from economic repercussions from the war in Ukraine. Although the Kremlin maintained plausible deniability about its connections to the Wagner Group for years, the Wagner Group has never been an autonomous organization. The Kremlin has always systematically directed Wagner's dealings in Africa, including human rights violations and illicit financial operations, to serve the interests of the Russian state.

This analysis investigates the differing operations and impact of the Wagner Group in two distinct African contexts: the Central African Republic and Mali. In the Central African Republic, Wagner achieved success by providing security and political support to President Touadéra's government in exchange for mining concessions, showcasing the most mature example of the their business model in Africa,. In Mali, the Wagner Group's initial involvement mostly centered on military support to suppress the country's insurgency without any major political or economic entanglements. However, when the Russian Ministry of Defense assumed control of the Wagner Group and restructured it under the Africa Corps, Mali fully aligned itself with Russia as part of its strategic objectives, with the Central African Republic distancing itself. The different impacts of the Wagner Group and Africa Corps in the Central Africa Republic and Mali reflect the unique political, military, and economic conditions in both countries.

The Wagner Group's Role in the Central African Republic: A Guarantor for Government Stability

Since early 2018, the Wagner Group has provided much-needed security and political assistance to President Faustin-Archange Touadéra's government, essentially acting as a linchpin for the regime's stability. In return for political, security, and military support, the CAR government has granted Wagner access to the country's mines. The result has been billions of dollars in profits, which have largely circumvented Western sanctions. In the years leading up to the Wagner Group's arrival, the Central African Republic experienced political and military instability, including coups, sectarian violence between the Séléka movement and the anti-Balaka alliance, and extreme humanitarian crises. [1] The worsening security situation led to several international interventions, including the United Nations Security Council arms embargo in 2013 and the United Nations Multidimensional Integrated Stabilization Mission in the Central African Republic (MINUSCA) in 2014.[2]

Competing international forces influenced President Touadéra's decision in 2017 to enlist Russia for security support. The controversies surrounding international involvements, namely the French, whose presence in the Central African Republic faced accusations of rape and crimes against humanity, pushed Touadéra to the Russians.[3] Regime protection was also a driving factor. Since his election in March 2016, escalating rebel violence repeatedly threatened to overthrow his government, with armed rebel factions at times controlling upwards of two-thirds of the country, including access to strategic mining locations.[4] In

areas outside of the country's capital, Bangui, Touadéra continuously struggled to assert and maintain power.

In 2017, after France ended its military operation, Operation Sangaris, Russia worked to set up a formal military partnership with the Central African Republic. An increasingly vulnerable President Touadéra sought security assistance and political support from Russia, with both sides convening at a private meeting in Sochi, Russia in October of that year.[5] Within a few months, Russia secured an exemption to the 2013 U.N. Security Council's arms embargo. Resolution 2399, adopted by the U.N. Security Council in January 2018, allowed for the provision of arms and military equipment to the Central African Armed Forces (FACA), provided these weapons would only be used by the CAR government.[6] Russia swiftly took advantage of this opportunity and began delivering arms and providing training to the CAR's military and security forces. [7]

By January 2018, Wagner troops were officially deployed to the Central African Republic.[8] In August 2018, bilateral relations between the two countries formalized with the signing of a military-technical agreement, laying the groundwork for a comprehensive partnership with Russia agreeing to train CAR recruits at its military academies, supply "military instructors," and navigate the U.N. arms embargo through exemptions. [9] The agreement's stated goal was to strengthen bilateral defense ties and build a partnership for regional stability; however, the implicit understanding was that Russia would offer political and military support to President Touadéra in exchange for access to the country's valuable mining resources.[10]

President Touadéra's reliance on the Wagner Group for personal protection, political counsel, and military support solidified Russia's role as a key ally in securing his regime. In March 2018, Touadéra appointed Valery Zakharov, a prominent Wagner figure, as his national security advisor.[11] After a coalition of armed groups tried to overthrow Touadéra in December 2020 and January 2021 in a violent coup, it was Russia that responded by dispatching additional troops and military equipment and helping the government regain territorial control.[12] Three shipments of weapons and military equipment from Russia—in May 2018, September 2019, and May 2021—were delivered to the Central African Republic, although it is likely that additional, undisclosed shipments also took place. This support has proved crucial for the country's defense capabilities. In the words of Touadéra, without Russian assistance, "we didn't have the means to equip our forces."[13]

Mining Monopolies and Wagner's Economic Influence in the Central African Republic

In exchange for political and military support to President Touadéra, the Wagner Group gained access to the Central African Republic's mineral wealth. In 2022, the country reported a modest gold production of 1,000 kg, while its diamond exports totaled $35.7 million, making it the fortieth largest exporter of diamonds in the world. [14] Wagner's newly

established front companies operating in-country, including Midas Ressources SARLU, Lobaye Invest, and Diamville SAU, all managed to sidestep international sanctions while carving out a significant regulatory advantage in the Central African Republic's mining sector. Gleaning over $2 billion in profits from illicit mining operations in just a few years, these companies have facilitated the financing of Russia's wider military and political objectives, including its operations in Ukraine. [15]

The Wagner Group used its political influence to bypass regulations and gain control of the Central African Republic's mineral resources. Although the 2009 Mining Code (Law No. 09.005), developed in collaboration with the World Bank, allows the CAR government to issue industrial mining licenses for up to 25 years, the country's scattered artisanal mines and poor infrastructure have made it difficult for large-scale industrial mining operations to take root.[16] This, along with the government's inability to formalize the mining sector in rural areas, has made the Central African Republic's mining industry an unattractive venture for foreign investors.[17] Using its significant political sway in the CAR government, the Wagner Group managed to get mining exploration and exploitation permits, establish shell companies for profit redirection, and secure mining areas, often through brutal force.[18]

One such company, Lobaye Invest, established on October 25, 2017, has secured at least eight mining permits.[19] Based on permit documentation obtained online, in April and June 2018, Lobaye Invest received authorization to extract diamonds and gold at five sites, with four of these locations—Bangassou, Ouadda, Bria, and Sam-Ouandja—classified within the Kimberley Process' "red zones." The Kimberley Process is a global initiative established in 2003 by the United Nations General Assembly Resolution 55/56, which aims to prevent conflict diamonds from entering the rough diamond market.[20] The Wagner Group's ability to penetrate these so-called "red zones" shows how deep the group's political influence runs. In June and July 2018, Léopold Mboli Fatran, the country's former Minister of Mines, granted Lobaye Invest mining recognition permits for two additional regions, Yawa and Pama, for three years, renewable annually.[21] According to these permits, Lobaye Invest is required to invest 500,000 CFA francs per cubic kilometer of mined area annually in the Central African Republic's economy. The permit also states that any Russian ownership supersedes prior permit agreements, rendering them null and void at the time of signing.[22]

In a controversial ruling on March 17, 2020, the Central African government awarded Midas Ressources SARLU, another Wagner-linked company, a mining permit for Ndassima, the country's only industrial mine, which is estimated to contain over $1 billion in gold.[23] This action nullified the 2010 mining permit of Canadian company, Axmin Inc. Axmin has since initiated international arbitration to seek compensation for the wrongful expropriation of Ndassima's assets.[24] Based on documents obtained by Politico, throughout 2022-2023, Midas Ressources received a new industrial mining permit from the CAR

government, which granted Wagner special status to export gold and gems and bypass state mediation. Satellite imagery and intelligence show a significant and rapid expansion of operations at Ndassima over the last year, including fortifications, bridge constructions, anti-aircraft defenses, and eight production zones. The Central African government has restricted United Nations flyovers at the site, and Wagner forces have even shot down United Nations drones, which suggest a total Wagner takeover of the area.[25] It is estimated that the Ndassima mine alone could yield profits exceeding $2.7 billion in profits for Russia.[26]

Since its registration in the Central African Republic's Commercial Register on 28 March 2019, Diamville SAU, a third Wagner-linked shell company, has openly declared its business focus on the trade and international shipment of diamonds and gold. Officially, the manager of Diamville is a Central African national, Bienvenu Patrick Setem Bonguende, but investigative findings suggest that Bonguende is actually closely associated with Dimitri Sytii, one of the Wagner Group's top Africa officials. In October 2019, a government decree confirmed the company's official authorization to export gold and diamonds.[27] In addition to operating in areas not authorized by the Kimberley Process, Diamville is suspected of recovering diamonds from seizures by the Ministry of Mines' Special Anti-Fraud Unit. In 2022, Diamville was also involved in a gold-selling scheme, which involved converting CAR-origin gold into U.S. dollars and physically transferring cash to circumvent sanctions on Russian financial institutions.[28]

Wagner-backed shell companies such as Lobaye Invest, Midas Ressources, and Diamville all exploit regulatory loopholes and maintain opaque structures in a deliberate attempt to hide the true nature of their operations. According to a Forbes assessment, mining, illicit gold trade, and the timber business across Africa could generate up to $5 billion in the coming years. These profits have evaded and will continue to evade international sanctions, funneling profits back to the Kremlin to support Russia's war effort in Ukraine.[29]

The Wagner Group's Military Role in Mali

In contrast to the Central African Republic, where the Wagner Group showed substantial political control and exploitation of its mining concessions, the Wagner Group's initial role in Mali focused on providing military and counterterrorism support to the ruling junta. Over the past decade, Mali has faced significant internal security challenges, including escalating Islamist violence. In 2012, Tuareg rebels led an insurgency in the north, which created a foothold for Islamist armed factions to take root. French-led counterinsurgency efforts through Operation Serval (2013-2014) and its successor, Operation Barkhane (2014-2022), were largely unsuccessful, and the security landscape in Mali continued to worsen as armed groups gained additional territorial control. With the Malian government unable to stop the country's security crisis and protect its citizens from Islamist militancy, political turmoil unfolded. On 18 August 2020, a coup led by a group of colonels—two of them had trained

in Russia—took control of the country's main military base. Within less than a year, a second coup took place on 24 May 2021 when Colonel Assimi Goïta seized power.[30]

Beginning in early 2021, the Malian government turned to Russian military advisors stationed in-country for international support. This move was driven by a history of cooperation between Russia and Mali, widespread dissatisfaction with the French interventions, and the recent "success" of the Wagner Group's counterinsurgency operations in the Central African Republic.[31] Russia and Mali already had an existing military-technical agreement that dated back to June 2019. This agreement aimed to strengthen bilateral defense relations, which included the sale and maintenance of two Mi-35 helicopters. [32] In September of 2021, news broke that Mali's military government was in talks with the Wagner Group to deploy 1,000 mercenaries for a monthly sum of $10.8 million U.S. dollars.[33] Toward the end of 2021, the Wagner Group's presence in Mali was officially confirmed. Meanwhile, military ties continued to deepen. In November 2022, Mali and Russia signed another military-technical agreement that centered on security, intelligence, risk and disaster management, counter-narcotics, and personnel training during an official visit to Moscow by the Malian Minister of Security and Civil Protection, Daoud Aly Mohammedine.[34] With a willing Russian partner able to provide the necessary military support to implement a sovereign policy, Mali's junta officially expelled international partners, including MINUSMA and the Ambassador of France in January 2022.[35]

However, unlike Touadéra's weak administration, which sought out the Wagner Group for security support and political endorsement, the junta's initial interest in the Wagner Group primarily focused on improving internal security rather than seeking political reinforcement. The strategic shift to engage the Wagner Group starting in 2021 was part of a larger strategy by the Malian junta to assert its sovereignty amidst internal instability and external pressures. In January 2022, the junta diverged from the agreed-upon 18-month transitional timeline established with the Economic Community of West African States (ECOWAS), opting to extend its governance for an additional five years. [36] During the first years of the Wagner Group's involvement in Mali, the junta was focused on consolidating its authority, strengthening its military capabilities to address insurgent threats, and resisting Western influence in the region. In contrast to the Central African Republic, there was no apparent inclination for deep political or economic collaboration during this period.

Wagner's Challenges and Limited Success in Mali's Mining Sector

Although Mali boasts more significant industrial gold reserves than the Central African Republic, positioning it as one of Africa's largest gold producers with 66.5 metric tons of gold produced in 2023, the Wagner Group's economic footprint in Mali initially struggled to take root. [37] This was due, in part, to the reluctance of the Malian junta to work with the Wagner Group to gain access to the country's mines, limiting Wagner to its military role in combatting jihadists. [38] Another obstacle stemmed from the presence of established

international companies already in possession of mining permits. Governed by the 1991 Mining Code, which granted foreign companies licenses for two years and mining permits for a maximum 30-year period, inclusive of renewals, Mali's mining landscape was designed to attract foreign investment.[39] The country's mining sector has historically been dominated by international conglomerates from Canada, Australia, and Britain.[40] In just 2022 alone, Mali's four largest gold mining companies—Resolute Mining, Barrick Gold, B2Gold, and Allied Gold—contributed $588 million in taxes and royalties to the junta. Investigations have uncovered that the tax dollars from these international gold mining companies have been funding the Wagner Group's $10.8 million monthly fee.[41] This method of funding through the formal economy is in contrast with the subterfuge, smuggling, and exploitative practices seen in the Central African Republic.[42]

Compared to the Central African Republic, the Wagner Group had limited success establishing shell companies in Mali. Following Wagner operatives Sergei Laktionov and Viktor Popov's arrival in 2021, they established Alpha Development, recruiting Malian national Bakin Gassimi Guindo to lead the venture.[43] In April 2022, they also co-opted Marko Mining, an existing Russian entity present in Mali since 2009. However, by January 2023, Mali's Ministry of Mines did not include any mining concessions related to Alpha Development. [44] With their difficulties in establishing shell companies, Wagner representatives, led by Sergei Laktionov, met with Malian authorities in April 2022 to seek permits at mining sites, potentially aiming to replicate the approach used to gain control of the Ndassima mine in the Central African Republic. The targeted sites included Fekola, managed by B2Gold of Canada, Loulo-Gounkoto, operated by Barrick Gold, and Syama, owned by Australia's Resolute. However, the Wagner Group's efforts to obtain these permits at this time were unsuccessful. [45]

With the shell company and permit-takeover model proving futile, the Wagner Group shifted its strategy towards influencing government policies to craft legislative outcomes beneficial to their operations. At the time of permit negotiations with Malian officials in 2022, on-the-ground reporting suggests that Sergei Laktionov also advocated for a gold nationalization scheme, which could potentially provide Wagner with backdoor access to acquire a partial percentage held by the State in these ventures. [46] In August 2023, just a year after these meetings, the junta announced a new mining code that prioritizes state interests, allowing the government to claim a 10% stake in mining projects, with the option to acquire an additional 20% within the first two years of commercial production. Under this new legislative framework, an additional 5% stake could be allocated to locals, increasing state and private Malian interests in new projects to 35%, up from the current 20%.[47] The newly revised Mining Code comes as the Malian government has struggled with the financial burden of the January 2022 sanctions imposed by the ECOWS. These sanctions have made it challenging for the junta to fulfill monthly payments to Wagner, leading some Wagner operatives to go on strike or even pillage villages.[48] The recent legislative reform shows

Russia's appetite to expand its involvement further in Mali's mining sector and establish a more profitable economic model.

The Post-Prigozhin Pivot: Russia's Evolving Strategy in Africa and Rising Geopolitical Tensions

For years, Russia maintained plausible deniability regarding its mercenary operations in Africa. This changed suddenly after Yevgeny Prigozhin's failed mutiny against the Kremlin in June 2023. In the days following the rebellion, Vladimir Putin publicly acknowledged state funding for the Wagner Group. Putin revealed that the Russian government had provided over $1 billion U.S. dollars to support the group's operations between May 2022 and May 2023. [49] In August 2023, after Wagner's top officials died in a suspicious plane crash. the Russian Ministry of Defense formally established the Africa Corps. This signaled a move away from the shadowy network of private military companies towards formalized state involvement.[50]

Following Prigozhin's failed rebellion, the Central African Republic appeared to distance itself from Russia. On 23 June 2023, the very day Prigozhin launched his armed rebellion against the Kremlin, Central African Republic officials sent a letter requesting an urgent meeting with a private U.S. security firm, Bancroft Global, to discuss security collaboration. The CAR government and Bancroft Global signed an agreement one month later.[51] In late December 2023, the CAR presidential spokesperson Albert Yaloké Mokpème confirmed in an interview that the country was "diversifying" its security relations beyond existing collaborations with Russia, Angola, Morocco, and Guinea. He also noted that the United States had offered to train Central African Republic soldiers both locally and on U.S. soil.[52] Despite this, Russia still is committed to maintaining its stronghold in the Central African Republic, as evidenced by plans to build an official Russian military base in Berengo that will accommodate up to 10,000 troops.[53]

By contrast, Mali's government has emerged as a willing partner in Russia's efforts to consolidate its influence in the Sahel region, a critical battleground for countries like China, the United States, and Russia to compete for global influence.[54] After facing challenges in securing a sustainable compensation system for its operations through the Wagner Group, the Africa Corps aims to become more politically and economically integrated within Mali. The Africa Corps is now offering Mali and other African governments what Russia's Main Intelligence Directorate, or GRU, is internally describing as a 'regime survival package.' This includes military and diplomatic support in exchange for access to strategically valuable natural resources. [55] Russian troops are now providing security to Mali's junta and participating in key decision-making processes. [56] With the recent reorganization of the country's mining sector in August 2023, there have also been talks of major negotiations aimed at removing Canadian company Barrick Gold from the management of the Loulo and Gounkoto sites, which produced 19.4 tons of gold in 2022, almost a third of the country's

production. According to several Malian sources close to the matter, Russia has its eye set on this takeover.[57]

On the ground, Russian forces have been working closely with the Malian Armed Forces (FAMa) to take control of separatist-held artisanal gold mines in northern Mali. In 2023, they briefly occupied three mines south of Bamako—Balandougou, Koyoko, and Yanfolila. [58] In November 2023, Russian troops, alongside FAMa, recaptured the northern town of Kidal.[59] In February 2024, they took control of the Intahaka mine, Mali's largest artisanal gold mine, but withdrew after a few days with promises to return. [60] In July 2024, in what some experts attribute to overconfidence from these previous successes, Russian and Malian forces launched a failed stabilization operation in the northeastern town of Tinzaouatene, which resulted in the deaths of 84 Wagner soldiers and 47 Malian troops. Ukraine claimed involvement in this attack, alleging that they provided the necessary intelligence and support to the Tuareg rebels to ward off the Russians and Malians. [61] Ukraine's supposed involvement in this conflict adds yet another layer of complexity to a country already laden with rival geopolitical actors.

Addressing the Geopolitical and Global Security Risks of Russia's Expanding Footprint in Africa

Russia has gained a foothold in over two dozen African countries within the last decade through a mix of proxy forces and political, economic, and military partnerships. While Russia's exact involvement varies country by country in Africa, it does follow a noticeably familiar pattern: work with countries rich in natural resources, such as gold and diamonds, suffering from instability, and offer security assistance and "regime survival packages." In parallel, Russia has worked to discredit its competitors, particularly those from the West, through disinformation and misinformation campaigns, positioning itself as a force in the future security of Africa and a major disruptor of global dynamics.

The case studies of the Central African Republic and Mali show how Russia's involvement is often tailored to local contexts in Africa. In the Central African Republic, a government in need of urgent regime protection turned to Russia, resulting in the Wagner Group's deep integration into the state apparatus in exchange for mining rights. In Mali, an initially hesitant government sought out Russia for military assistance, gradually expanding into a broader political, military, and economic partnership under the Russian state-sanctioned Africa Corps. Both cases show how Russia's actions were not uniformly imposed but rather negotiated with African states looking to strengthen their own political and military positions.

Russia's activities in Africa are part of a broader goal to galvanize support for its vision of a multipolar world order, away from Western unipolarity. This vision depends on weakening Western influence across Africa and creating a global system where multiple powers wield global influence. By offering resource deals and economic and military

partnerships, Russia has been able to incentivize some African governments to align with its geopolitical vision. Many African governments view Russia as a partner offering support without the "strings attached" that often come with Western aid. At the United Nations, Russia is using its relationship with Africa to impact votes on key issues such as the Ukraine conflict. Two recent examples include the 2022 United Nations vote to condemn Russia's invasion of Ukraine, where 17 of the 35 abstaining countries were from Africa, and the 2023 United Nations vote calling for an end to the war in Ukraine, where Mali voted against the resolution and 14 African countries abstained.[62] While these voting patterns do not reflect a homogeneous pro-Russian stance across the continent, they do show the complex interplay of geopolitical ambitions, national interests, sovereignty concerns, and localized agency dynamics.

Moscow's increasing aspirations to ally with African governments carry significant risks for the continent's economic growth, democratic stability, ongoing conflicts, and the rule of law. Groups like the Wagner Group and Africa Corps have committed human rights violations, caused further destabilization in the region, and undermined local and international peacekeeping efforts. Across Africa, but especially in Mali and the Central African Republic, there is clear evidence to suggest that Wagner and Russia have been involved in civilian-targeted executions, mass graves, acts of torture, rape, sexual violence, pillaging, arbitrary detentions, and enforced disappearances.[63] Draining Africa's precious mineral resources thwarts the continent's chance of self-sufficiency and development. By backing authoritarian governments, Russia is supporting a growing militarization of governance and, according to the West, stifling Africa's democratic ambitions. The reality on the ground in Africa is more nuanced. Some African leaders, including Mali's Colonel Assimi Goita, publicly claim that Russian support will help stabilize and eventually return their country to democratic rule.[64]

To better counter Russia's influence, Western policymakers must prioritize targeted sanctions that disrupt financial flows from Russian irregular units to the Kremlin. As the case studies of this analysis have shown, Russia and its proxy forces have managed to circumvent sanctions by standing up shell companies and exploiting legal loopholes. Instead of focusing on high-profile, headline-grabbing figures like Prigozhin (part of the Wagner 'brand'), efforts should be directed toward the behaviors and systems that sustain Russian irregular forces and their intermediaries.[65] A multi-sector, collaborative approach involving U.S. government agencies, allied nations, and public interest stakeholders is critical to dismantling the organizations, activities, and policies that underpin the Kremlin's paramilitary cartel. [66]

In addition to sanctions, the international community must work with African partners to address the underlying vulnerabilities that Russia seeks to exploit. This can be done through supporting African-led initiatives, including the African Union and ECOWAS, investing in locally aligned economic opportunities, and strengthening democratic

institutions. The future of Africa's political, economic, and security landscape will be shaped by how well African governments and the international community can navigate these complex dynamics. Without the right approach, countries across Africa risk becoming pawns in a broader geopolitical struggle, especially as the number of international players on the field only continues to grow. If efforts to stop Russian influence come up short, Russia and its proxy forces will manage to reshape the geopolitical landscape in Africa, undermining the aspirations of its people for peace, prosperity, and self-determination.

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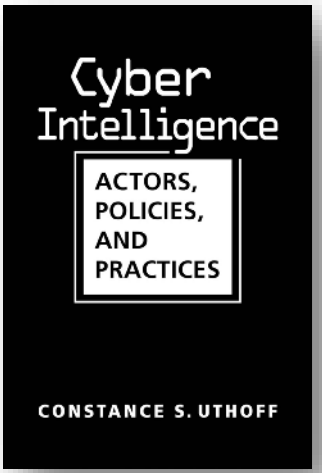
Reviewed by William Garrity, Joint Special Operations University



The recent uptick in cyber-attacks worldwide, whether criminal ransomware targeting the United States healthcare industry or likely state-sponsored attacks targeting Ukraine, has brought the specter of cyberspace threats to everyone's doorstep. Constance S. Uthoff, in *Cyber Intelligence: Actors, Policies, and Practices*, describes the diverse nature of the threat and the Intelligence Communities' approach to both understanding and mitigating the threat. Uthoff, an associate program director of the Cybersecurity Strategy and Information Management Program at George Washington University, though not an Intelligence Community insider, brings a scholarly approach to the topic that will enable the novice to quickly grasp the scale and magnitude of the threat.

Uhtoff immediately immerses the reader into the complicated world of cyber operations with the details of the 2020 SolarWinds supply chain intrusion that ultimately would span hundreds of companies and most of the Executive Branch agencies. The likely-Russian state-sponsored operation provides a timely example for the author as Uthoff utilizes the intrusion itself and the United States government response, to set the stage for her approach in the book. It is an approach that is both intuitive and informative, resulting in a work that is a ready reference.

The book begins by explaining key terms and concepts associated with cyber intelligence but fails to provide an overview of what is meant by cyberspace, the physical and virtual realities that define it, and associated terminology. This suggested overview would be extremely beneficial for the novice. Uthoff then turns to cyber threat actors, but surprisingly organizes the discussion based on a mixture of targeted systems (supply chain, financial sector, etc.) and techniques (ransomware); as opposed to by actors (nation-state, non-nation state, criminal organizations, etc.), though the author does dedicate a chapter to non-state actors later in the book.

Uhtoff in chapter three, "The Cyber Intelligence Cycle and Process," explains in detail the fundamentals of the generic "Intelligence Cycle" and provides an overview of the types of requirements levied on the intelligence community with-respect-to cyber actors. The "Intelligence Cycle" can, and is, applied to any problem set. The author keenly points out how the Intelligence Community attempted to describe an intelligence cycle focused on cyber requirements. A discussion of more value would have been the different intelligence collection and production requirements levied by customers to support cyber security enhancement, defensive operations, and offensive cyber operations. That said, the author does touch on each of these in some form in the chapter. The author also delves into how the private sector is approaching the problem and teaming with government entities to develop best practices.

Of great value to both practitioners and academics focused on developments in the cyber realm is chapter four, "National Security Strategies and Policies." Uhtoff, through obvious extensive research, works the lay person through the thought process pertaining to cyber operations from National Security Strategy, National Military Strategy, and National Intelligence Strategy. Included is an in-depth discussion of policy on each U.S. administration and the impact of such policies on cyber operations. This superb chapter warrants investing in this book for just this chapter alone.

In chapters five through eight, Uhtoff describes with impressive detail the evolution of cyber strategy, policy, and operations in the Office of the Director of National Intelligence, the National Security Agency, the Central Intelligence Agency, and the Federal Bureau of Investigation. The level of research and details is, again, impressive. The author provides not only well referenced documentation but historical examples which drove the evolution of these agencies with respect to cyber policy and operations. In chapters nine and ten, the author describes the expected difficulties with intelligence sharing and the always present issue of counterintelligence. The intelligence sharing discussion is bolstered with detailed accounts of legislative efforts to address problems of sharing that have plagued the Intelligence Community since time its inception.

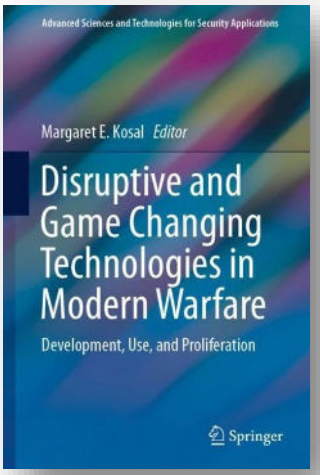
Uhtoff provides even more value in chapter nine by taking the reader through a historical review of cyber operations dating back to the first Gulf War and up to the recent fight against the Islamic State. In chapter ten, she delves into state and non-state actors, providing a comprehensive review of their operations, intent, and motivations. To include historical accounts detailing threat actor tactics, techniques and procedures. Uhtoff rounds out the work in chapter eleven where she examines emerging cyber challenges, chapter twelve where she provides a review of three case studies of cyber espionage, and finally in chapter thirteen with a discussion of the future of intelligence support to cyber operations. Overall, *Cyber Intelligence: Actors, Policies, and Practices*, is an impressive, well researched, and in-depth look at the cyber battlespace. It will serve as a ready reference for both cyber practitioners and academics for many years to come.

BOOK REVIEW

Disruptive and Game Changing Technologies in Modern Warfare: Development, Use, and Proliferation by Margaret E. Kosal

ISBN 978-3-03028-341-4, Springer International Publishing, September 2019, 222 pages, $139.99 hardcover

Reviewed by Darrin L. Frye, Naval Medical Research Unit - San Antonio



In this formative work, *Disruptive and Game-Changing Technologies in Modern Warfare,* the authors skillfully dissect modern warfare's intricate and ever-evolving landscape. Focused on three pivotal themes—Adoption, Proliferation, and Governance of disruptive technology; challenges to strategic stability posed by disruptive technologies; and the effects of these innovations on military capabilities and operations—the book emerges as a comprehensive guide to the complex intersection of technology and warfare.

The journey begins with a meticulously crafted introduction that captures the reader's attention and lays the groundwork for an engaging exploration of the subsequent ten chapters. Each chapter delves into a specific technological domain, presenting an in-depth analysis that seamlessly weaves together relevant context, relatable content, and insightful references. Each chapter is well-crafted and can be used independently either as a capsulated, detailed offering or consumable as a federated component featuring the whole spectrum of game-changing technologies.

The metaphorical three-legged stool, comprised of Adoption, Proliferation, and Governance, is introduced as a framework for understanding the successful integration of game-changing innovations into the competitive battlespace. The authors underscore the critical importance of each leg, emphasizing their collective contribution to ensuring the efficacy of these innovations.

Particularly noteworthy are the chapters focused on Adoption, Proliferation, and Governance. Exploring Revolutions in Military Affairs transcends the mere discussion of technological particulars. Instead, it reflects thoughtfully on the current technologies supporting military systems. The authors delve into the sobering methodology of predicting

technology proliferation, exposing the futility of banning specific weaponry while shedding light on the challenges posed by lethal autonomous weapons.

Examining emerging life science technologies introduces the intriguing "dual-use conundrum," urging serious discussion on the ramifications of precision genomic editing and targeting provided by CRISPR-Cas9 systems technology. With this remarkable DNA targeting tool and other emerging biological technologies, the potential realm of violent possibilities increases exponentially, demanding enhanced analysis of novel threats formally improbable.

In a subsequent chapter, the authors highlight the emergence of novel meta-materials and their critically important enabling contributions and capabilities. They introduce discussions on enhanced compositions that boost strength and communication and expand capabilities such as speed of action, increased stealth, and sustainability. These dynamic physical innovations could be made with precision manufacturing delivered through 3D (additive manufacturing) printing capabilities. Beyond the intricate designs, manufacturing specifications, and frequent layering of discordant material requirements, completing functional tools at or beyond the visible scale remains a remarkable achievement. These industrial technologies are producing fantastic opportunities and yet formidable challenges for the worldwide community looking to control the spread of weaponizable technologies.

Leaders in the modern era continue to govern indominately despite the psychological weight and physical threat posed by vast nuclear weapon arsenals burrowed strategically into the dirt around the world. The authors offer an excellent presentation on how emerging technologies, such as Artificial Intelligence/Machine Learning (ML), could assist in tracking nuclear progress and potential inflection points and create best practices for deterrence. The application of advancing predictive tools like ML to counter Weapons of Mass Destruction threats—including both biological and nuclear systems, adds thoughtful depth and relevance to the exploration of disruptive technologies.

Addressing the weaponization of energy, in addition to the critical focus and attention on the subject, an interesting discriminatory methodology was introduced that emphasized the necessity of knowing whether machinery or personnel were being targeted. This distinction is essential and captured well in discussions on the powerful tool's capabilities, options, and vitally important—its ethical usage. The detailed breakdown of passive, active, conventional, and directed energy forms driving EM weapons helped gain further insight into this relatively unknown emerging armament that holds so much influence and destructive power.

As critical as outgoing energy driving battlespace weaponry is the massive energy required flowing inward to make everything work. From complex command and control systems to vehicle coordination, down to soldier-carried devices, without power, there is no advantaged fight. Discussion on rapidly recharging destructive devices and the energy

demands of battlespace operations provides a holistic perspective on the intricate interplay between technology, innovation, and strategic options.

The strategic view from the air, focusing on protecting Army Aviation and enabling military dominance, becomes paramount in facing challenges that state and non-state actors pose. As the authors emphasize, "Without air superiority, there is no asymmetric strategic advantage ensuring global freedom of maneuver for land (or other) forces."

Appropriately positioned, the final chapter on logistics underscores the importance of supply as a prerequisite for the success of forces at all levels, primarily those actions with some duration. It adeptly draws connections to emerging technologies discussed earlier, highlighting their integral role in paradigm shifts related to support, adaptability, control, sustainability, and their impact on future logistical operations.

The sheer amount of detail and the vast scope of the narratives could be overwhelming; however, the chapters are expertly written so that readers with all backgrounds can easily relate and understand the overarching concepts. While reading technology-dense books always demands a certain level of attention and patience from the reader, a determined effort is undoubtedly rewarding.

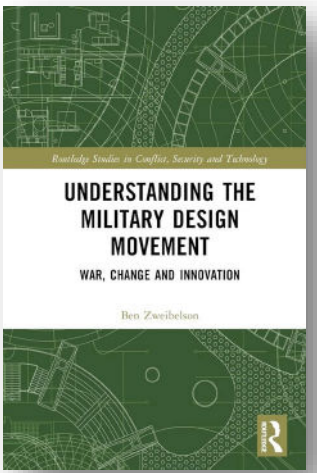
Congratulations to the authors for successfully navigating the numbing pace of innovation and presenting such a comprehensive and entertaining discussion of disruptive and game-changing technologies. This book caters to a diverse audience, from enthusiasts tracking emerging technologies to strategic planners and civilian and military members seeking a nuanced understanding of innovative science and its implications for security forces. Because of this, *Disruptive and Game-Changing Technologies in Modern Warfare* is an indispensable guide for anyone invested in the evolving landscape of modern warfare.

BOOK REVIEW

Understanding the Military Design Movement: War, Change, and Innovation by Ben Zweibelson

ISBN 9781032481784, Routledge Studies in Conflict, Security and Technology, June 2023, 342 pages, $44.79

Reviewed by: John Dill, United States Space Command, Colorado Springs, Colorado, USA



In *Understanding the Military Design Movement*, Dr. Ben Zweibelson examines the history and methodology of the design movement's attempts to penetrate and be adopted by the militaries of Israel, the United States, and, more briefly, Canada and Australia. Dr. Zweibelson offers a unique perspective, grounded in his immersion in military design. He was the lead design facilitator at the Joint Special Operations University (JSOU) and was awarded a Doctorate in Philosophy (focused on design) from Lancaster University (UK). His book is also informed by his multiple combat deployments as an U.S. Army Infantryman where he was awarded four Bronze Star Medals. Despite his muddy boots origins, Dr. Zweibelson currently serves as the Director for U.S. Space Command's Strategic Innovation Group.

This is a densely written book that chronicles the ideological conflict between Brigadier General Shimon Naveh and, later, Dr. Ofra Gracier, and their acolytes versus the military establishments in those respective countries over changing the Western methodology of envisioning and planning for war. Naveh et al. advocate for integrating design methodology, post modernism, and accepting complexity in the preparation for and execution of conflict. The respective military establishments resist, and in Zweibelson's telling, cling to an outmoded, less effective, rigid, reductionist method rooted in a frequently flawed understanding of Clausewitz and modern, hierarchical, and reductionist practice.

This book begins with a brief history of design itself, exploring its roots in the commercial world. Readers and even planners previously unexposed to design theory may find this a bit of a slog. The narrative then segues into design's adaptation by Naveh to a military praxis. For military design 1.0, termed Systemic Operational Design (SOD), the Israeli Defense Force (IDF) is the first battleground between the advocates for a free flowing,

difficult to understand, uncodified, evolving method of thinking about campaigns, and adherents of traditional, rigid by comparison, practices. Design proponents freely avow that their method requires exceptional talent, and Naveh focuses version 1.0 at the General Officer level. SOD 1.0 is believed to require that level of understanding of war and command authority for its proper execution. In what will be a recurring theme, the forces of tradition win out just before the controversial 2006 Hezbollah War and Naveh becomes a prophet scorned in his own land. The errors and failures of the 2006 campaign are laid, fairly or unfairly, at SOD's feet.

The setting then shifts to Fort Leavenworth in 2004 as Naveh's efforts receive a second wind. The United States Army, mired in Afghanistan and Iraq, is searching for a better mousetrap for its planning efforts. Naveh's revamped military design, SOD 2.0, was adopted by the Army's premier planning school where Majors go to learn campaign planning, the School of Advanced Military Studies (SAMS). Naveh focuses his efforts from 2004-2009 on training staff members who will graduate to write the orders for Corps and Division Headquarters on his intuitive, ever-changing and constantly revised method. The effort was fraught with difficulty as students had a mixed record of achieving the required insights. Although this was supported by SAMS leadership and demonstrated some success in the 2004 Unified Quest war game, SOD 2.0 foundered as Corps and Division Commanders found their planners speaking in a different tongue. The small number of SAMS planners were on a different sheet of music from the rest of the Army. Attempts to work design into broader doctrine similarly foundered as it proved impossible to pack thousands of pages and hours of required education into the short chapters allocated for general understanding. The U.S. Army SOD experiment, focused on young field grade officers, ebbed away, as Zweibelson describes advocates eventually reduced to holding clandestine meetings hidden away from official oversight.

Concurrently with the SAMS experiment, the United States Marine Corps (USMC) also expressed interest in military design as a replacement for traditional planning methods. No less a personage than then Lieutenant General James Mattis, head of the Marine Corps Combat Development Command, advocated for design and its inclusion in USMC doctrine. He was also the proponent for partnering with the Army on the development of counter insurgency Field Manual 3-24/MCWP 3-33.5. The author describes a similar fate for design as USMC disciples ran into bureaucratic opposition who reduce design to a formula and awkwardly insert it upstream from traditional planning. The USMC's results were similar to the Army's as military design had a short, turbulent life that came to an end shortly after its champion, Lt. Gen Mattis, was reassigned to lead I Marine Expeditionary Force.

Zweibelson also delves into military design's rise and fall in the Canadian and Australian military establishments. Both those nations had officers exposed to design in American military schools with subsequent development of small communities of advocates. These proselytes also attempted to inculcate design into their professional military education schools with mixed results. Similarly, SOD's sojourn at JSOU was short lived as the contract

to teach the concept was terminated in 2014. As for Naveh and his teammate, Dr. Ofra Graicer, they have returned to Israel where the IDF is experimenting with SOD 3.0. In the author's narrative, the best and brightest IDF General and Flag Officers are invited to attend seminars and workshops. Their small groups experiment with using design to solve Israel's security issues under the tutelage of Naveh and Gracier. Whether military design 3.0 is the answer has yet to be determined but the question may be answered shortly by the progress of the current difficult campaigning in the Gaza Strip.

The story painted in *Understanding the Military Design Movement* is one of military establishments searching for, experimenting with, and then rejecting military design as a complement to traditional planning. Zweibelson documents the challenge of embedding a difficult concept and ever-changing methodology based largely on postmodern philosophy and commercial practice into institutions looking for widely understandable, fixed, and concrete methods for doctrine. The inability to do so when focused on Israeli Brigadiers, American Majors, and O-8-supported Marine doctrine developers make one wonder if the implementation of military design is an achievable goal. However, the author takes heart from the small communities who, despite occasionally fractious relationships, keep the concept of military design alive, continually working on and refining it. He also sees that change is a long game, comparing it to science where progress is measured, in physicist Max Planck's s quote about scientific advancement, "one funeral at a time." Zweibelson advocates for the inevitability of this change as Western high-tech forces continue to be challenged by much less equipped, but ultimately successful, movements.

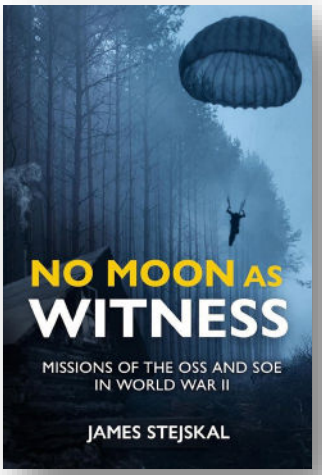
This challenge—the poor track record that the vaunted security establishments of the West have of late—is the heart of the why to read this book. While the description of design is useful and perhaps eventual SOD version X.X may be the key to reversing trends since at least Vietnam, the description of how tradition and bureaucracy strangle innovation is a lesson to dwell upon. Failure should be a catalyst for change and improvement. The long running, quickly collapsed, debacle in Kabul should provide appetite and energy for improvement. As we face the challenge of potentially confronting the People's Republic of China's economic peer while saddled with 34 trillion dollars in debt, we will need to do things differently lest we demonstrate Einstein's famous definition of insanity. Design may very well not be the answer to that equation, however, examining and overcoming the difficulty of creating change will help us solve our challenges as the answers are developed.

BOOK REVIEW

No Moon as Witness, Missions of the SOE and OSS in World War II by James Stejskal

ISBN 978-1-61200-952-0, Philadelphia Oxford, June 2021, 186 pages, $21.48 hardcover

Reviewed by: Thomas Brian Ventrone, Joint Special Operations University



To the average American citizen, World War II was won by aircraft bombing raids, amphibious assaults, and naval battles across the globe. James Stejskal, in *No Moon as Witness, Missions of the SOE and OSS in World War II,* enlightens the reader to the secret agent activities and clandestine operations that enabled the Allies to perform their large-scale operations and conquer the axis powers. Stejskal, a career Army Special Forces Chief Warrant Officer and CIA case officer, served across the globe before becoming a military historian and author. His personal experiences and meticulous research have enabled him to illustrate several books on special operations throughout history and peel back the veil on our special operators and their exploits.

No Moon as Witness is a very interesting read. This book is divided into thematic sections focusing on the origins of the Special Operations Executive (SOE) and Office of Strategic Services (OSS); how they performed assessment, selection, and training; identified some specific tools of the trade; outlined some of the primary operations; and wraps up with the final actions that ended the war. The book offers insights into the establishment of clandestine organizations of the United Kingdom and United States. Under direct order of Prime Minister Winston Churchill, the British established the SOE with the mission to "set Europe ablaze." Just a couple of years following the establishment of the SOE, the U.S. established the OSS under the direction of President Franklin D. Roosevelt.

Stejskal does a great job explaining the characters and their actions in developing the systems for selecting personnel and outlining the skills that these recruits would be trained and tested to perform once in the field. Much deliberation was done to find secure and unassuming locations to perform personnel selection, processing, and training to keep all organizational actions from leaking to the Germans.

The author performed a great deal of research and attention to detail in the production of this piece of work. The way he describes the various tools of the trade bring them to life. The reader can gain inordinate understanding of how these tools were developed, manufactured, and put to operational use. The Brits and Yanks were able to utilize unbelievable ingenuity in tools and their operational effectiveness. It is amazing that some of the processes and tactics practiced by the SOE and OSS are still effective to this day.

In addition, Stejskal describes the operations and field agents in such a way that the reader feels as if they are experiencing the operations and are able to know and appreciate the agents. The way that he illustrates the coordination between the SOE and OSS operatives and their in-country underground operatives made it easier to understand and retain. The operators really came to life in the illustration.

Although the SOE and OSS served with tremendous honor throughout World War II, they had challenges at the end of the war. There were personality changes with the senior leaders of each organization which caused the occasional roadblock or temporary diversion in training or mission execution. This text enabled the reader to understand the actions and dynamics of the effects that resulted from the missions throughout the war and where the organizations wound up. Lessons learned from this text will allow readers to evaluate their own personality traits and make better decisions in the future to promote a more cohesive environment for mission planning and execution.

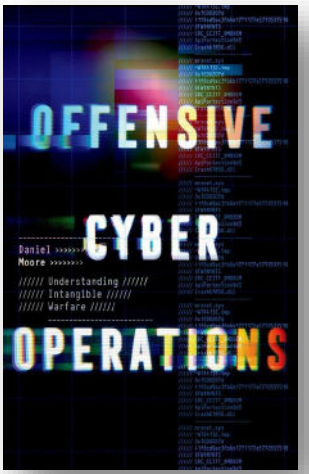
I think Stejskal was able to take the reader back to the 1940s through his illustration of SOE and OSS history. I would recommend *No Moon as Witness Missions of the SOE and OSS in World War II* to all who are interested in special operations and the birth of irregular warfare or the spy game. The illustration used in this book does a good job drawing the reader into and through each section as you look forward to the next point of interest. The participants come to life and provide a greater platform to present the tactics and tools that were developed and utilized throughout World War II. Every reader will gain a greater understanding and appreciation of the insurgent relationships during World War II.

BOOK REVIEW

Offensive Cyber Operations: Understanding Intangible Warfare by Daniel Moore

ISBN 978-0-19765-755-3, Oxford University Press, August 2022, 328 pages, $37.69 hardcover

Reviewed by: Sean Pascoli, Army Research Lab



Offensive Cyber Operations is a timely book that is highly recommended as a primer for the Special Operations Forces (SOF) community as it evaluates the role that United States Special Operations Command forces can fill in the cyber domain. Daniel Moore adroitly explores the principles and boundaries of cyber warfare. The author does a masterful job of demonstrating how conflict on the cyber domain is a natural evolution of warfare and how traditional conflict has employed software as a weapon. He goes on to demonstrate the symbiotic relationship between military technology and civilian advancements throughout the annals of human conflict.

Moore examines in detail how the threat landscape is arrayed and expertly explains in an easy-to-understand narrative how significant the impact of civilian intelligence agencies can have on offensive cyber operations. He proposes a model to assess network attacks and determine if these attacks constitute an act of war. This model is composed of five categories: target, impact, attacker, goals, and relationships. These five parameters allow governments to differentiate between three different types of activities—hostile attacks, intelligence campaigns, and criminal activities. A model to assess network attacks is crucial in offensive cyber operations as it enables a systematic understanding of vulnerabilities, tactics, and potential exploits. Such a model allows offensive teams to anticipate, simulate, and counteract adversarial strategies effectively, enhancing the overall cybersecurity posture. By incorporating threat intelligence and advanced analytics, these models contribute to a proactive defense strategy, ultimately safeguarding critical digital infrastructure from sophisticated cyber threats.

The book then goes on to discuss the challenges associated with building an international consensus on what constitutes offensive cyber operations, paying particular

attention to how the lack of a universal lexicon leads to confusion when trying to apply terminology and analogies to cyber incidents. The most interesting part of the book was the author's argument for why it is so important in the context of national security to identify where intelligence activities end and cyberattacks begin. He goes on to suggest that offensive cyber operations should be defined more clearly by expanding them to encompass different varieties while maintaining a balance between inclusiveness and cohesion. Not an easy task when you lack consensus on international norms and a common lexicon. His thesis on the differences between presence-based and event-based cyber operations introduces a new way to describe military cyber operations, identifying each as either presence-based or event-based. It has shaken up academia and has brought a scientific taxonomy into a discussion otherwise dominated more by international relations experts and less by scholarship from people with his level of military and technological expertise.

The author originally submitted this book as his Ph.D. thesis at Kings College London. He is a well-respected contributor to the infosec community and served in the Israeli Defense Force's Unit 8200—a famed Cyber/Signals Intelligence operations corps widely recognized as one of the most elite such units in the world. The author does a superb job of explaining the complexities of cyber warfare by using real world examples such as the TV5 Monde and Seoul Winter Olympics to name just a few of the compelling real-world examples discussed in the book. These examples highlight how these attacks often reside in a gray area between warfare and non-warfare activities with unique capabilities applicable to both.

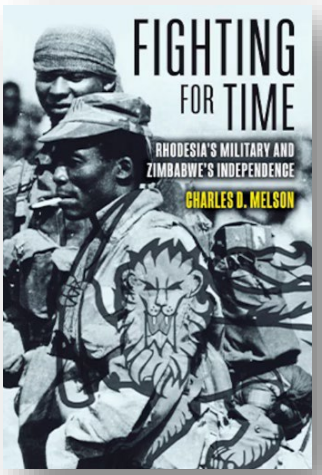
Offensive Cyber Operations: Understanding Intangible Warfare is an excellent primer for everyone in the SOF community to read for a better understanding of the principles and boundaries of offensive cyber operations. SOF are a force multiplier for offensive cyber operations primarily due to their placement and access. As SOF continue to formalize its doctrine and training standards for Offensive Cyber Operations (OCO), an understanding of OCO is critical for its success. For those already working in SOF cyber operations, the comprehensive framework for assessing network attacks and understanding the complexities of offensive cyber operations is relevant and of great interest to SOF Cyber Operators and Planners.

BOOK REVIEW

Fighting for Time Rhodesia's Military and Zimbabwe's Independence by Charles D. Melson

ISBN 978-1-95271-506-8, Casemate Publishers, February 2021, 316 pages, $57.35 hardcover

Reviewed by Anthony Lawson, Professor of Practice, Joint Special Operations University



Over the last several years there has been a resurgence in Cold War-era foes. Currently, Ukraine finds itself in a fight for its existence with Russia. While the fighting in Rhodesia was much different than what is taking place today, many of the issues faced in the Rhodesian conflict remain today. *Fighting for Time Rhodesia's Military and Zimbabwe's Independence* provides an in-depth account of the problems faced by a country undergoing a counter insurgency fight and the innovative approaches the Rhodesians used to overcome them. The author, Charles Melson, a former Chief Historian for the U.S. Marine Corps, focuses his work on irregular warfare and counterinsurgency (COIN), an increasingly relevant fight in the current global environment.

Melson begins chapter one by framing the situation in Rhodesia prior to the fighting, focusing mainly on events leading to Rhodesia's Unilateral Declaration of Independence from Great Britain. The author's approach to the military situation throughout the colonial period prepares the reader well for the events later in the book. While the Unilateral Declaration of Independence certainly contributed to the fighting, a broader framing of Rhodesia's importance and geo-political position within the Cold War helps novice readers gain a more holistic appreciation of the Rhodesian environment.

In chapter two, "From Border Control to Cross-border Operations" the author introduces the growth of the conflict. As the situation developed in Rhodesia, so did the tactics and structure of the Rhodesians. Melson provides a great overview of two of the most influential organizations of the conflict, the Special Air Service and the Combat Trackers, whose tactics and developments reached far beyond Southern Africa. For readers uninitiated to the Rhodesia conflict, paying special attention to this chapter, and the first, will help readers understand the multitude of acronyms that are intrinsic to all military operations.

Chapter three provides the groundwork for what may be the most important part of the book—supporting arms and air support. The Rhodesian Air Force had a strategic role in the conflict, but what it is probably best known for is its role in supporting the ground forces. Supporting arms is perhaps the aspect of the conflict that benefits the most from added context about the Cold War because of the clandestine nature of the resupply of supporting arms. While this reader mostly enjoyed the chapter, a discussion on why providing arms and aircraft to the Rhodesians was critical, it would demonstrate the importance of supporting arms in the conflict.

The author continues the topic of air power in chapter four as he shifts focus from internal security to COIN. This chapter describes the changing focus of air power as the insurgency grew in the region. It focuses mainly on the traditional uses of air power but introduces the changing use of air support in COIN, as air assets were increasingly used for command and control, reconnaissance, and observation in addition to close air support.

Chapter five provides detail on joint operations, and Melson's experience as a Marine officer shows through in his ability to accurately make sense of the operations. The overall structure and command and control of the operations within the conflict is described, while additional focus is placed on the tactical considerations of joint operations. This chapter also introduces more information on the Selous Scouts, Grey's Scouts, the Special Air Service and how things like the Rhodesian Intelligence Corps and psychological operations supported joint operations.

Chapters six through eight get into the heart of the fighting and will provide great value to both practitioners and academics studying Rhodesia and COIN. Chapter six, appropriately titled "The Killing Machine," focuses on the Fire Force. Melson provides great insight into the conflict through his collection of first-hand accounts of Fire Force deployments while detailing all aspects of the operations. In chapter seven, he goes into detail on cross border operations. Since many of these external operations were never disclosed or even denied, the author's research provides a great record. Chapter eight gains the interest of practitioners through the author's discussion of special operations and unconventional warfare, as Melson debates Rhodesia's interaction with the Mozambique National Resistance and what were labeled "dirty tricks."

Melson's conclusion, "To What End: Tactical Victory, Strategic Defeat," says it all. The book focuses on the tactical aspects of the conflict but there is enough coverage on the strategic side to understand why the Rhodesians lost. *Fighting for Time Rhodesia's Military and Zimbabwe's Independence* is an in-depth, well researched look at an incredibly interesting important topic, COIN. The lessons of Rhodesia have many similarities to the recent fights in Afghanistan, making the book both timely and relevant. Additionally, strategic competition has many parallels to a new cold war, making the study of conflicts such as this increasingly important. Melson's book will serve both practitioners and

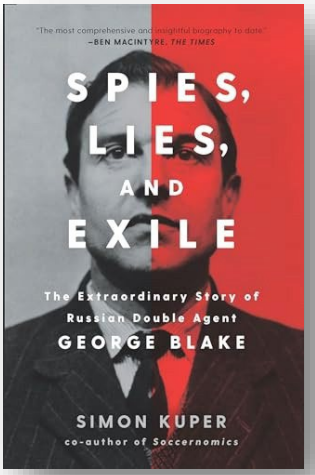
academics well as the world figures out how to navigate competition once again between great powers.

BOOK REVIEW

Spies, Lies, and Exile: The Extraordinary Story of Russian Double Agent George Blake by Simon Kuper

ISBN 978-I-62097-375-2, The New Press, May 2021, 278 pages, $8.50 hardcover

Reviewed by: Mike Parrott, National Intelligence University Adjunct Instructor



Simon Kuper's *Spies, Lies, and Exile* is a treasure trove of retrospective insights into one of the United Kingdom's most destructive espionage cases. The detailed reflections captured in this book are recommended for examination by insider threat and counterintelligence professionals to gain a glimpse inside the mind of a trusted insider-turned-traitor. George Blake's betrayal of friends, family, organization, and nation foreshadowed comparable American insiders like Aldrich Ames, Robert Hansen, Anna Montes, and countless others. Kuper's comprehensive compilation of interviews, correspondence, and historical artifacts from various spy agencies provide first person accounts from the spies and spy catchers intimately involved in this case; specifically, Blake's own account. As a journalist, Kuper, provides lay readers a detailed account of one of Britain's own spies turned double agent and lengths one may go to commit espionage. Occurring during the Cold War, an age of espionage, double agents, and counterspies, this book is a valuable resource for current practitioners who are looking to enhance their understanding of the factors that drive an individual to commit espionage.

Spies, Lies, and Exile begins with George Blake, an imprisoned spy for the United Kingdom's Secret Intelligence Service (SIS) also known as MI6, hiding in a Wormwood Scrubs Prison wall passageway in October 1966, preparing to escape. The book then transitions to Blake's origin story in the quaint Dutch city of Rotterdam and his time living in a Jewish mansion in Cairo with his aunt after his father's death in September 1936. Shortly thereafter, while visiting his home in the Netherlands for the summer, the Second World War broke out, resulting in his brief internment by the Germans. After successfully navigating his way to Britain, he joined the Navy as a midget submarine diver. Following an episode in which he blacked out underwater, Blake entered the espionage business with SIS. Blake's prior experience in the resistance provided the SIS recruiter the bona fides for employment within the elusive agency. However, what the SIS failed to discover until it was too late, was Blake's loyalties were not to Britain, but instead were with the anti-Nazi cause. A vetting error that proved costly for the spy agency in the future.

Blake's conversion to Communism while in Korean captivity proved to be the catalyst that led to his ultimate betrayal of King and Country. According to Kuper, "Blake felt abandoned, unimportant, and wanted to prove himself," a condition referred to in a recent Behavioral Threat Analysis Center Bulletin as "disgruntlement." A cursory examination of some of the most destructive spy cases in history reveals individuals suffering from modest to severe disgruntlement and narcissism. Blake initially embraced Communism as a solution to his disgruntlement while being a prisoner-of-war in Korea. Kusper explains, "Blake felt abandoned, unimportant, and wanted to prove himself." During his time working for the KGB (the Soviet Union's foreign intelligence and domestic security agency) Blake used the agency for his own selfish purpose. This ideological shift would be his downfall in the end, but not before destroying and negatively impacting the lives of numerous agents, sources, and organizations. Amid Kim Philby and George Blake's espionage activities from 1945 to 1963 approximately 400 British intelligence officers and assets were compromised to the Soviets. A large number were captured, tortured, and put to death for his treacherous admissions.

The book concludes with Blake sheltering inside his home in Russia amid the coronavirus pandemic. He never regretted his actions. Instead, he reminisced and enjoyed the life in exile he made for himself, despite the grave damage he caused so many others. He died at the age of 98 in 2020, A life wrought with treachery, lies, deceit, and betrayal.

In an era of strategic competition, it behooves U.S. and allied leaders, military officials, academics, and industry partners to pay attention to historical vignettes like Blake's. Aggrieved trusted insiders pose a significant threat to national security. Indeed, espionage cases continue to make the news, ranging from U.S. Naval personnel selling secrets to China to the Special Agent in Charge of the New York FBI Counterintelligence Division conspiring to violate U.S. sanctions against Russia. While these spies have been caught and made the news, what should be concerning for all leaders and security professionals are the ones who remain unnoticed and unreported. Only through effective leadership, persistence and vigilant counterintelligence activities and counter-insider threat programs will the United States be successful in detecting, identifying, and countering threats like these. As both a learning tool and espionage classic, *Spies, Lies, and Exile* is an excellent addition to a counterintelligence practitioner's bookshelf.