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MASTER OF MILITARY STUDIES

Balancing the Force: Why the Marine Corps should become Masters of the Gray Zone

SUBMITTED IN PARTIAL FULFILLMENT
OF THE REQUIREMENTS FOR THE DEGREE OF
MASTER OF MILITARY STUDIES

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8 APR 2016

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ABSTRACT (MAXIMUM 200 WORDS) The "gray zone" is the latest phrase among the highest level of military leadership to describe the challenges that occur between peace and traditional interstate conflict. In the future, the probability for military engagement in gray zone conflicts is significantly higher than interstate conflicts. However, the United States military currently lacks the trained and equipped forces necessary to address all of the gray zone challenges America faces. Currently the preponderance of gray zone missions are managed by Special Operations Command (SOCOM). However, these elite forces have become frayed due to stress from the high operational tempo. America requires a larger specialized gray zone force capable of providing a balance between Special Operation Forces (SOF) and conventional conflict in order to ensure the nation is ready for current and future operations. The Marine Corps is the answer to this problem because of its combined arms training, crisis response capabilities and forward posturing. Now is the time for this movement because America is searching for additional forces to operate in the gray zone and the Marine Corps is trying to solidify its role in the future operational environment.			
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Executive Summary

Balancing the Force: Why the Marine Corps Should become Masters of the Gray Zone

Author: Major Luke I. W. Balthazar, United States Marine Corps

Thesis: The complexity of today's security environment and its increasing "gray zone" challenges present the Marine Corps with a unique opportunity to refocus its efforts on gray zone operations in order to balance the capabilities of the Department of Defense (DOD).

Discussion: The "gray zone" is the latest phrase among the highest level of military leadership to describe the challenges that occur between peace and traditional interstate conflict. In the future, the probability for military engagement in gray zone conflicts is significantly higher than interstate conflicts. However, the United States military currently lacks the trained and equipped forces necessary to address all of the gray zone challenges America faces. Currently the preponderance of gray zone missions are managed by Special Operations Command (SOCOM). However, these elite forces have become frayed due to stress from the high operational tempo. America requires a larger specialized gray zone force capable of providing a balance between Special Operation Forces (SOF) and conventional conflict in order to ensure the nation is ready for current and future operations. The Marine Corps is the answer to this problem because of its combined arms training, crisis response capabilities and forward posturing. Now is the time for this movement because America is searching for additional forces to operate in the gray zone and the Marine Corps is trying to solidify its role in the future operational environment.

Conclusion: The shift in operational environment towards gray zone challenges contributed to a change in the character of war which in turn demands change in how the Marine Corps thinks and plans. The future Marine Corps needs to avoid the siren's song of a conventionally focused strategy and become a force capable of fighting and sustaining gray zone operations. If the Marine Corps continues to marginalize its gray zone capabilities, SOF will continue to fray and the United States military will remain heavily weighted for an interstate conflict, lowering its readiness for intrastate conflict. Ultimately, the United States needs the Marine Corps to become the masters of gray zone operations to bring balance to the nation's force.

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Preface

For the past three years I have observed the Marine Corps adrift as it struggles to determine its role in a post Operation Enduring Freedom (OEF) security environment. Expeditionary Force 21 highlights the struggle as it attempts to refocus the Marine Corps on its pre-911 conventional role as an amphibious assault force and its new role as America's Crisis Response Force. The intent of this research is to provide the reader with the vision that the Marine Corps is the only service that can actually bring balance back to the United States military. To do so it must focus its resources and efforts on gray zone operations. The Marine Corps is America's middle weight force and therefore it should be preparing for and focused on executing America's middle weight missions. To truly embrace these types of operations the Marine Corps will need to distance itself from its conventional mindset of large scale amphibious assaults and return to its small wars roots. It is my hope that this paper influences the reader to think about the potential that the Marine Corps can add to America's military capabilities if it became focused on the Irregular Warfare capabilities necessary to succeed in the gray zone.

I want to acknowledge Professor Michael Lewis for the hours of tutelage that he invested in me and the multiple drafts he had to read. He forced me to move outside my comfort zone which ultimately made me a stronger critical thinker. I want to thank the Marines at the Marine Corps Warfighting Lab (MCWL) and the Training and Education Command G-3/5/7 for the support and encouragement. Finally, I want to acknowledge my wife, Heidi, and my two boys for sacrificing their precious time with me in order to allow me to complete this program.

Introduction

The “(f)irst step in solving any problem is recognizing that there is one.”¹ As the operational environment evolves, so must the Marine Corps. Since the end World War II (WWII) the Marine Corps has been addicted to interstate conflicts, focusing its resources on conventional capabilities. For the Marine Corps, the last fourteen years of combat allowed its forces to operate in regimental size elements in a land locked country hundreds of miles from the sea, ultimately feeding the conventional war addiction. As the Marine Corps attempts to return to its amphibious roots and become the “middle weight” force, conducting missions between light Special Operations Forces (SOF) and heavy conventional forces, it must reevaluate its role in the national defense arena in order to maximize its value in the national defense strategy.

For decades there has been an ongoing debate relating to the role of the Marine Corps’ in the national security arena.² Should the Marine Corps be focused on conventional warfare or small wars? In 2010 the Marine Corps Warfighting Lab (MCWL) released the *Marine Corps Operations and Concepts 2010* where it stated that the

“... conventional focus often assumed that forces designed, trained and equipped for major combat operations against a peer competitor would be equally adept at operations to counter insurgents, guerrilla forces, and other irregular threats. Recent experience has revealed the fallacy of such assumptions. Understanding and adequately preparing for operations against irregular threats requires an intellectual investment by Marines similar to that expended by their forbearers in developing amphibious warfare capability and our maneuver warfare philosophy.”³

Unfortunately, since 2010 the Marine Corps has continued to press the development of its conventional capabilities, specifically focusing on the ability to seize forward naval bases and amphibious assault, ultimately marginalizing its irregular warfare capabilities.⁴ The complexity of today’s security environment and its increasing “gray zone” challenges present the Marine

Corps with a unique opportunity to refocus its efforts on gray zone operations in order to balance the capabilities of the Department of Defense (DOD).

Types of Armed Conflicts and Frequency

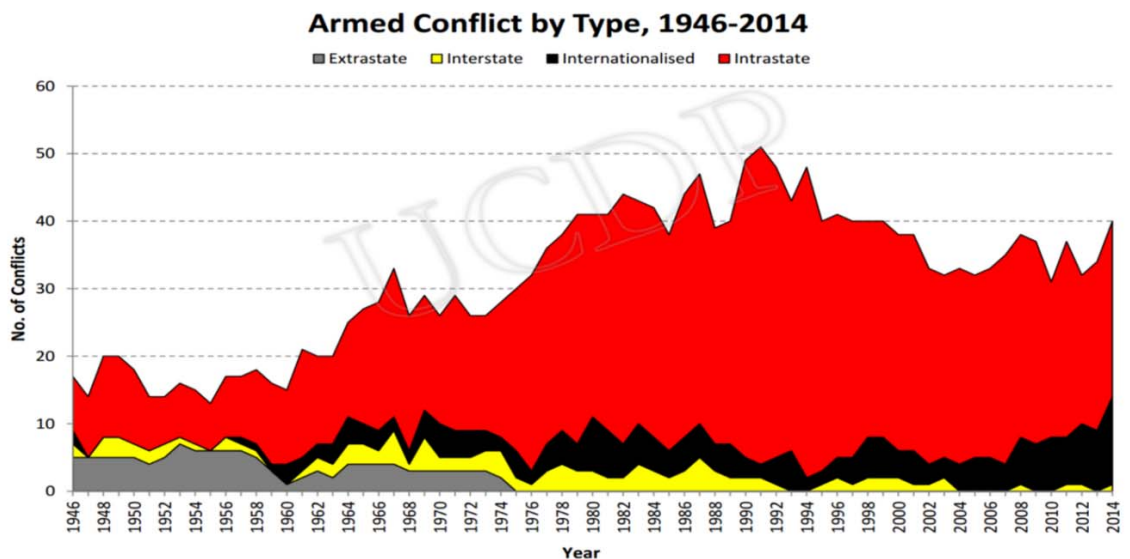
Before engaging on this argument to shift the focus of the Marine Corps towards the gray zone, a common understanding of armed conflicts and their associated vernacular is necessary. This paper will discuss concepts related to interstate conflict, intrastate conflict, extrastate conflict, small wars, and gray zone challenges.

The Department of Peace and Conflict Research at Uppsala University (UCDP) defines interstate conflict as “(a) conventional conflict between two or more governments.”⁵ Interstate conflict is conventional in nature and therefore it is also referred to as war or the black zone. An example of interstate conflict is the current India/Pakistan conflict.

An intrastate conflict is an internal conflict that occurs within a state’s borders. UCDP defines intrastate conflict as “... (a) conflict between a government and a non-governmental party, with no interference from other countries.”⁶ Insurgencies, organized crime and civil wars are just a few examples of intrastate conflicts. When a foreign government becomes involved in an intrastate conflict, the conflict changes to become an “intrastate conflict with foreign involvement” or “internationalized”. UCDP defines intrastate conflict with foreign involvement as “an armed conflict between a government and a non-government party where the government side, the opposing side, or both sides, receive troop support from other governments that actively participate in the conflict.”⁷ An internationalized conflict according to The Geneva Academy, is defined as “... (a)n armed conflict confined geographically to the territory of a single state...” where a “...foreign state intervenes with its armed forces on the side of the rebels fighting against government forces.”⁸

From the early 1800s through 1940, the Marine Corps conducted operations that would have been classified as intrastate conflicts, internationalized conflicts and extrastate conflicts. The Marine Corps referred to these engagements as “small wars”. According to the Small Wars Manual, small wars “...(A)re operations undertaken under executive authority, wherein military force is combined with diplomatic pressure in the internal or external affairs of another state whose government is unstable, inadequate, or unsatisfactory for the preservation of life and of such interests as are determined by the foreign policy of our Nation.”⁹

Beyond interstate and intrastate conflicts, there are extrastate conflicts which are defined as “...a state actor versus a non-state actor in some other party’s territory (either another state, non-incorporated territory, or territory controlled by a non-state actor).”¹⁰ According to the UCDP research presented in Figure 1, the number of extrastate conflicts has been non-existent since 1975 however Michael Allen’s article “*The Rise, Decline and rebirth of Extrastate Wars*”, argues that extrastate conflicts will reemerge in the future as governments pursue terrorists outside their own territorial borders.¹¹



Uppsala Conflict Data Program 15 January 2016. UCDP Conflict Encyclopedia: www.ucdp.uu.se/database, Uppsala University

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Figure 1

Figure 1 provides a depiction of UCDP's study of the types of conflicts that have occurred over time.¹² Figure 1 clearly shows that since 1946, intrastate conflicts have occurred more frequently than any other type of conflict. From the data in Figure 1, the UCDP concluded that since 1946, near peer countries are likely to avoid interstate conflict with each other and they foresee this trend lasting into the foreseeable future.¹³ This information is valuable when shaping the capabilities of the future force and in predicting what the future operational environment will look like.

The Gray Zone

There are multiple definitions of the gray zone. The United States Special Operations Command (SOCOM) defines Gray Zone challenges as the "...(C)ompetitive interactions among and within state and non-state actors that fall between the traditional war and peace duality."¹⁴ The *Small Wars Journal* defines gray zone challenges as "...security challenges, existing short of a formal state of war..."¹⁵ A SOCOM white paper describes the gray zone as the area where competitive interactions between peace and war occur.¹⁶ For the purposes of this paper, the gray zone starts with the use of military assets to prevent a crisis and is limited to operations short of interstate conflict. For example, operations on the left of the gray zone in Figure 2 would include the employment of cyber warfare, information operations (IO) or even Humanitarian Aid and Disaster Relief (HA/DR). The middle of the gray zone includes intrastate and extrastate conflicts such as the United States involvement in the fight against Daesh in Syria and Iraq. Finally, the black circle represents interstate conflict ranging from state on state conflict to a world war.

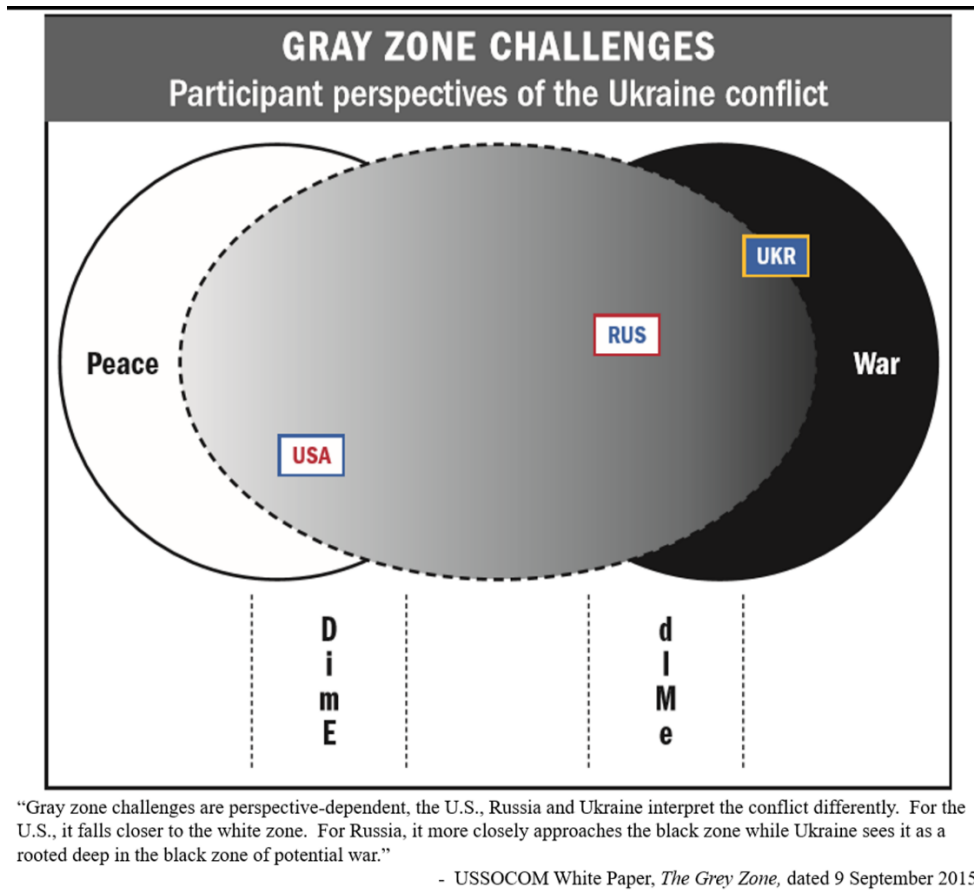


Figure 2

Gray zone conflicts are “aggressive, perspective-dependent and ambiguous”, meaning countries can view the same situation differently.¹⁷ Figure 2 also includes an illustration of the subjective nature of the gray zone concept as it relates to Russia’s actions in Ukraine.¹⁸ The boxes representing the United States, Russia and Ukraine overlaying the circles that represent peace, the gray zone and war, reveal how each nation perceives Russia’s actions in Ukraine.¹⁹ Russia’s “little green men” operating in eastern Ukraine are perceived by Ukraine as an invasion force and therefore Ukraine views the situation as interstate conflict.²⁰ This is different than both Russia and the United States who both perceive the situation as an intrastate conflict.²¹ Both governments support opposite sides with weapons and training but are not deploying actual

troops to Ukraine. From this perspective this conflict can be characterized as an intrastate conflict with foreign involvement.

Figure 2 also identifies the elements of national power using the construct of Diplomacy, Information, Military and Economic (DIME). Each element is represented with a capital letter emphasizing its importance at a point on the chart. For instance, lower on the gray zone scale, Diplomacy and Economic power should be the primary elements of national power to influence outcomes, however the military may still have a role through other means such as HA/DR operations. On the opposite end of the spectrum, closer to war, Information and Military power become the primary elements used to influence outcomes. More generalized, the gray zone concept is an umbrella phrase used to describe the operations between peace and short of interstate armed conflict.²² The Small Wars Journal blog identifies the gray zone as the zone “...where revolutions, resistance, and insurgencies take place”.²³ Gray zone conflicts can grow into interstate conflicts and interstate conflicts can become gray zone conflicts.²⁴ There have been a total of 2,045 intrastate, extrastate and local internationalized conflicts, the types of conflicts that would fall into the gray zone, since the end of WWII.²⁵ Armed conflicts classified as non-interstate conflicts were almost seventeen times more likely to occur than an interstate conflict.

The Operational Environment

Armed with an understanding of the different types of conflicts, their frequency and the gray zone, a picture of the current and future operational environment materializes. At a forum at the Center for New American Security in December of 2015, the Chairman of the Joint Chiefs of Staff (CJCS), Marine General Joseph Dunford, stated that many of “...today’s challenges...” take place in “...areas that have been characterized as the gray zone...”.²⁶ He described a

current and future operational environment where threats will be “transregional, multi-domain and multi-functional”.²⁷ These types of threats include global radicalism, cyber warfare, and recent issues in Ukraine and the South China Sea to name a few.²⁸ He concluded his forum speech stating that his “number one challenge” is creating a balanced force capable of meeting the “...requirements of the current fight” and ensuring the force is ready for tomorrow’s fight.²⁹ In order to better understand the balance and roles of America’s future military, a more in depth review of the current and projected operational environment is necessary.

While the UCDP report stated that near peer interstate conflicts are not likely to occur in the future, the United States must still be prepared for interstate conflict. As of February 5, 2016, the Council on Foreign Relations (CFR) *Global Conflict Tracker* identified two ongoing interstate conflicts, the Korean conflict and the India/Pakistan conflict.³⁰ For decades, both conflicts have fluctuated between flashpoints of active armed conflict and dormant periods.³¹ During the flashpoints in the India/Pakistan conflict, the international community often steps in to mitigate the impacts before the situation evolves into a large scale conflict.³² In the Korean conflict, the United Nations (UN) serves as a venue for South Korea and its neighbors to keep North Korea at bay, mainly through sanctions.³³ The United States also provides a significant amount of military support to include manpower to deter North Korean aggression.³⁴ While tensions still exist in both interstate conflicts, they are currently dormant.

Although there are only two interstate conflicts in the world, there is potential for gray zone conflicts to become interstate conflicts, however the UCDP report suggests near peers to the United States are likely to avoid war with other near peers. Therefore, these great powers will most likely interact in the gray zone. The CJCS identifies Russia’s actions in Ukraine and China’s actions in the South China Sea as potential threats to the United States. Russia and

China are both executing gray zone strategies and both are taking advantage of the gaps in America's capability to handle gray zone challenges.³⁵ Until recently, China's island building in the South China Sea has gone unchallenged, although United States Navy (USN) ships have started to sail within twelve miles of the islands, raising tensions between China and the United States.³⁶ Russia's ongoing campaign in Ukraine uses propaganda, clandestine troops and proxy forces to destabilize Eastern Ukraine with a long term goal of potential reform.³⁷ To counter Russia's perceived actions, the United States has increased its funding for Ukraine training, partnering and the supply of weapons and materials to Ukraine.³⁸ While the actions and responses in the events in the South China Sea and Ukraine have remained in the gray zone, a single mistake or misinterpretation could move them towards interstate conflict.

With near peers executing long-term gray zone strategies, the gray zone becomes more complex with insurgencies and intrastate conflicts around the world. Max Boot's book *Invisible Armies* and its aligned Insurgency Tracker at the Council on Foreign Relations, identifies twenty-nine countries currently facing intrastate conflict.³⁹ Among the intrastate threats identified by the tracker, the closest to the United States is in Mexico.

The gray zone challenge on the southern border of the United States ultimately impacts domestic policies, expends treasure, and forces Americans to experience the international impacts of Mexico's \$100 billion dollar illegal drug market.⁴⁰ The Mexican Drug Trafficking Organizations (DTOs) and the organized crimes they conduct have been connected to the deaths of over 164,000 people in the past eight years.⁴¹ This conflict has contributed to approximately 45,940 Mexican refugees and asylum seekers in 2015 according to the United Nations High Commissioner for Refugees (UNHCR).⁴² In response to the DTO activities and a lack of trust in the Mexican government, private Mexican citizens have created illegal militias.⁴³ These factors

are indicative of a high level of instability which could threaten the sovereignty of Mexico and ultimately foster additional instability in Central America and the Southern United States. The United States has responded by investing over \$350 million dollars to fund training for Mexico's military and government forces between 2009 and 2014.⁴⁴ Since the United States Congress approved the 2009 Merida Initiative, United States "...Army Delta Force and Green Berets as well as U.S. Navy SEALs have participated in training Mexican security forces..." in missions ranging from sniper training to intelligence analysis and more.⁴⁵ The support of the United States for Mexico against the DTOs is evidence of America's current participation in the gray zone.

How the United States chooses to invest and support the Mexican government to combat the DTOs is part of a gray zone strategy. Whether it be for HA/DR, military training or counter-terrorism operations, the United States military will need to be prepared to prevent or mitigate interstate conflict, address intrastate conflicts, prevent mass atrocities and deny safe havens for terror groups.

The Center for Emerging Threats and Opportunities (CETO) is a partnership between MCWL and the Potomac Institute for Policy Studies. This partnership publishes reports related to future threats and opportunities for military leadership. In December of 2015, CETO published the *2015 Edition of Flashpoints* which identifies the potential areas in the world for future conflicts. CETO analyzed 159 nations for potential "risk for conflict" utilizing ten factors: Governance, Demographics, Energy, Water, Religion, Corruption, Disease, Education, Gender and Economics.⁴⁶ Countries ranked as the most prone to conflict faced significant issues with multiple factors simultaneously.⁴⁷ Of the top ten flashpoints in the world, nine are located in Africa and the tenth is Afghanistan.⁴⁸ Ultimately, *Flashpoints 2015* identifies the multitude of

obstacles and instability facing the American military. The projected African flashpoints coupled with the gray zone challenges in Syria, Iraq, Ukraine and the South China Sea leave American leaders with no shortage of decisions related to the current employment of the military.

The projected future operational environment is a more complex and distorted reflection of today's operational environment where political leaders will need to determine what role the United States will play in the global political environment. Future engagements in gray zone operations should be aligned with the prevention or mitigation of catalyst events that could result in interstate conflict or undesirable outcomes such as mass casualty events. These missions would include partnering with and advising other militaries to increase the stability of a government in order to deny potential safe havens for groups that threaten America. Interstate conflicts are still the most dangerous course of action; particularly against near peers due to the potential of nuclear weapons release. However, this only increases the importance of success in the gray zone as gray zone operations work to prevent such scenarios from ever occurring. With a low probability of interstate conflict, the United States is far more likely to be involved in the gray zone challenges involving intrastate conflict and potential proxy-wars in the form of intrastate or extrastate conflicts.

While the operating environment itself is increasingly complicated, the large national debt and cuts to military funding add another dimension to the complex situation. In 2011, the CJCS, Admiral Michael Mullen stated that the greatest threat to National Security was America's debt of \$14.7 trillion.⁴⁹ As of the start of Fiscal Year (FY) 2016, the national debt was at \$18.1 trillion, over 100% of the total Gross Domestic Product (GDP) of America.⁵⁰ In order to reduce this enormous debt, politicians have cut funding for national security by fifteen percent over five

years with sequestration.⁵¹ In January of 2015, the four service chiefs unanimously briefed Congress on the impacts of sequestration to national security stating that the current military force is "...unable to meet the requirements of the Defense Strategic Guidance, the Pentagon's marching orders under the defense caps."⁵² As of August 2015, the United States military maintains close to eight hundred bases outside the continental United States (OCONUS). Included in that number are smaller "lily pad" bases, in order to be responsive to current and new threats.⁵³ It is expensive to maintain these bases and to man, train and equip a military capable of meeting these threats. The result has been a significant downsizing of the force, program cuts, and modernization cuts.⁵⁴ This in turn has caused the force to take risks by reducing carrier group deployments to the Middle East and Asia.⁵⁵ Ultimately this increases the difficulty of the CJCS and senior military leaders as they work to balance the force capabilities to meet the evolving complex environment on a tight fiscal budget.

The complexity of today's operational environment will be compounded in the future as globalization continues, demographics change, and natural resources become more limited. Insurgencies, mass migrations, and weak governments are a few of the catalysts contributing to instability. As a fiscally constrained United States military attempts to balance two dormant interstate conflicts, near peer nations pursuing gray zone strategies, a global fight against terrorism and the threats from a significant number of different intrastate conflicts, they must also begin to prepare and shape the future force for transregional and multidimensional challenges.

The Current and Future Force

Due to the vague and ambiguous nature of gray zone operations, American political and military leadership have inherently turned to United States Special Operations Forces (SOF) to

operate in these environments.⁵⁶ Within SOCOM, each special operations branch, United States Army Special Operations Command (USASOC), Air Force Special Operations Command (AFSOC), Naval Special Warfare (NSW) and Marine Special Operations Command (MARSOC) is tasked to “man, train, and equip” special operators to their specific mission sets.⁵⁷ Each special operator is specially trained for at least one mission set in the gray zone.⁵⁸

Unlike the Army, Air Force and Navy which continue to be conventionally focused, SOCOM specifically focuses on Irregular Warfare (IW) and employing asymmetric capabilities to successfully operate in the gray zone. According to Department of Defense Directive 3000.07, IW can be conducted independently or combined with traditional warfare and “can include ... counterterrorism; unconventional warfare; foreign internal defense; counterinsurgency; and stability operations that, in the context of IW, involve establishing or re-establishing order in a fragile state or territory.”⁵⁹ With the exception of stability operations, the strategic mission of IW aligns with SOF mission sets which include, “Direct Action (DA), Combating Terrorism (CBT), Foreign Internal Defense (FID), the Unconventional Warfare (UW), Special Reconnaissance (SR), Psychological Operations (PSYOP), Civil Affairs (CA), Information Operations (IO), and Counter-proliferation of Weapons of Mass Destruction (CP)”.⁶⁰

In training for and focusing on these types of missions, SOF inherently think and operate differently than the conventional focused forces. The first SOF truth is that “Humans are more important than Hardware,” implying that the training, mindset and attitude of SOF soldiers, sailors, airmen and Marines are more important than high-tech equipment.⁶¹ SOF operators are trained to employ combined arms and conduct distributed operations in small teams.⁶² SOF are taught about culture and language in order to thrive in an unconventional environment and make

educated decisions while understanding the second and third order effects of those decisions.⁶³ SOF personnel and equipment are forward stationed, utilizing clandestine bases, ships and some of the eight hundred military bases around the world to be responsive, effective and efficient. SOF are well equipped and lightweight, allowing them to be strong enough to complete their expected mission and light enough to insert and extract quickly.

The current operational environment and a high operational tempo have significantly impacted SOF.⁶⁴ Only three percent of America's military force are considered SOF. With so few responsible for so much of the operational spectrum, SOF have seen a significant drop in retention rates.⁶⁵ In a July 2015 report, the Government Accountability Office (GAO) discussed the impacts of the high deployment tempo to include an increase in suicides among operators, stating that the "DOD and SOCOM and its service component commands have recognized the strains these deployments have placed on the force, such as increased suicide rates and effects on readiness and retention..."⁶⁶ To try and alleviate some of the pressure, SOCOM has increased the number of SOF operators and corresponding support personnel.⁶⁷ While significant demands are placed on SOF, there are ways to alleviate the pressure as SOCOM is not the only force that can conduct IW.⁶⁸

While SOF may be a good answer for clandestine and other sensitive missions, they require assistance from another force in the gray zone. Former SOCOM Commander Admiral Eric Olsen argues that SOF should not be the sole force capable of combating gray zone challenges.⁶⁹ Other services like the Marine Corps must adapt more SOF-like thinking and capabilities such as valuing experience, languages and knowledge of foreign cultures in order to relieve pressure on the SOF community.⁷⁰

Studies by the Center for Strategic and Budgetary Assessments (CSBA), the Naval War College, and the 2010 Marine Force Structure Review Group agree that the Marine Corps should “occupy a ‘sweet spot’” defined by company to battalion level operations.⁷¹ While Expeditionary Force 21 (*EF-21*) has continued the shift towards the gray zone, it has not been enough to allow the Marine Corps to master the gray zone and relieve the pressure from SOF.⁷² Instead *EF-21* maintains a conventional focus for the majority of the Marine Corps while simultaneously accepting a smaller role as the nation’s crisis responders. In January 2014, a Congressional Research Service (CRS) report suggested that the Marine Corps shift towards a crisis response (CR) mission in order to eliminate redundancy between the Army and the Marine Corps.⁷³

The CR mission has been embraced by Marine Corps leadership with the creation of Special Purpose Marine Air Ground Task Forces (SPMAGTF) utilizing Company Landing Teams (CLTs) as a base unit to conduct CR missions.⁷⁴ SPMAGTFs consist of a mission tailored combination of Marine elements. Aviation capabilities consisting of a combination of planes and helicopters make up the Aviation Combat Element (ACE). The Ground Combat Element (GCE) consists of the combat forces such as infantry units, artillery and combat engineers. A Logistics Combat Element (LCE) provides the enablers necessary to support and sustain the SPMAGTF. Finally, a Command Element (CE) provides the command and control for the entire SPMAGTF. Within the SPMAGTFs, the tactical units employed as the CLTs. *EF-21* describes CLTs as units that provide a means to engage forward locations, enable disperse operations to secure landing sites and maneuver deep to inland objectives and are maneuverable enough to quickly mass together when required.⁷⁵ Additional studies by CSBA and the Naval War College conclude that operating in smaller forces allow for a “lighter foot print.” However

CLTs require additional technology and training to support distributed and decentralized operations.⁷⁶ The smaller CLTs operate similar to larger teams of SOF units, and allow the Marines to conduct distributed operations and improve responsiveness.⁷⁷ *EF-21* envisions a future where CLTs and Battalion Landing Teams (BLTs) will conduct Operational Maneuvers from the Sea (OMFTS) and be capable of aggregating quickly into a larger forces for larger contingencies.⁷⁸

While the Marine Corps has returned to its maritime roots through the forward deployment of Marine Expeditionary Units (MEUs), the fiscal cuts have resulted in a shortage of naval amphibious ships which has driven Marine Corps Leadership to embrace forward land basing in order to shorten response times. This is an adaptation to America's fiscal challenges while ensuring a maximum capability is forward deployed. It has tested the idea of utilizing foreign ships as forward staging platforms for Marines to be launched from.⁷⁹ Recently the Marine Corps announced the creation of permanent stations in Spain and Guam and consistent deployment rotations to Australia and the Philippines.⁸⁰ With both sea based and land based Marines deployed around the world, the Marine Corps is more responsive for short fuse missions.

During the last fourteen years of conflict, the United States military has seen more missions committed to partnering and training foreign conventional forces and foreign SOF around the world, especially in Iraq and Afghanistan.⁸¹ A recent *War on the Rocks* article titled *Fighting and Winning in the "Gray Zone"* stated "neither the Army nor Marines has dedicated the force structure to the (Security Force Advisor) SFA mission" and that SOF requires help from the conventional forces to meet the plethora of SFA missions demanded today.⁸²

While the Marine Corps may not have a dedicated force for SFA missions, it has recognized the demand for SFA missions, creating the Marine Corps Advisor Training Group (MCATG) in 2008 to train deploying training teams for tours mentoring the Afghan and Iraqi militaries.⁸³ In 2011 MCATG became part of a new school, the Marine Corps Security Cooperation Group (MCSCG) which is tasked to:

“Execute and enable Security Cooperation (SC) programs, training, planning, and activities in order to ensure unity of effort in support of USMC and Regional Marine Component Command (MARFOR) objectives and in coordination with the operating forces and MAGTF(s).”

-Marine Security Cooperation Group⁸⁴

MCSCG is still building its capabilities and knowledge as they train and educate Marine advisors. In September 2014, the Marine Corps established a secondary Military Occupational Specialty (MOS) to designate Foreign Security Force Advisors (FSF) graduating from MCSCG.⁸⁵ While this is a step in the right direction, the secondary MOS disrupts advanced specialization as promotion depends on professional development in primary MOS key billets, ultimately marginalizing secondary MOS capabilities. In a best case scenario for Marines with these specialty MOSs, a consistent rotation occurs between primary MOS and secondary MOS which continues to limit the Marine’s ability to truly master either specialty. The creation of the secondary MOS and MCSCG has had little effect on filling the overall SFA personnel requirements. A gap still exists and SOF continues to execute a high deployment tempo.⁸⁶

Despite the recent actions by the Marine Corps to assist in the SFA missions, the Marine Corps has not fully embraced the gray zone beyond HA/DR, Noncombatant Evacuation Operations (NEOs) and CR. It still focuses its resources and efforts on the threat from a potential interstate conflict with a near peer and its conventional role in that interstate conflict.⁸⁷ *EF-21* specifically notes that the BLTs will continue to be the base unit ultimately. Such a

statement forces the Marine Corps back to its conventional role during interstate conflicts and drives how the Marine Corps organizes, mans, trains and equips.⁸⁸

The concept of crisis response is not new, nor is the concept of mastering the gray zone. In fact the recommendations to make the Marine Corps an unconventional focused force has been argued for years. Captain James Webb, now Senator Webb from Virginia, argued in a 1986 Marine Corps Gazette article titled *Roles and Missions: Time for Change* that the majority of missions for the Marine Corps conducts are classified as “other such duties” within Title 10.⁸⁹ Captain Webb argued that Title 10 actually marginalized the Marine Corps by limiting its focus to amphibious warfare. This argument is still valid today. The last time the Marine Corps executed an opposed large scale conventional amphibious assault was at Inchon in 1950 during the Korean War.⁹⁰

The Marine Corps trains its forces to utilize combined arms to conduct amphibious assaults, raids, demonstrations, and withdrawals, although it rarely executes such actions. Since 1990, the MEU has represented the Marine Corps forces at sea. A study conducted by CETO analyzed the MEU amphibious operations conducted by the MEUs between 1990 and 2013.⁹¹ Of (123) amphibious operations, over 85% of the Amphibious Operations fell into the “other” category with approximately 50% of the overall amphibious missions going towards HA/DR missions and Noncombatant Evacuation Operations (NEOs). In that time period there were (123) total amphibious operations conducted by the MEUs. The five doctrinal amphibious operations types are: “assault, withdraw, raid, demonstration and other operations in a permissive, uncertain or hostile environment.”⁹² CETO also included a sixth “strike” category defined as air operations.⁹³ The report lists (20) Strike Operations, (4) Amphibious assaults, (1) Amphibious withdrawal, (8) Amphibious demonstrations, (2) Amphibious Raids, (88) other

operations in permissive, uncertain or hostile environments.⁹⁴ In that same period and part of the “other operations” the Marine Corps conducted (38) HA/DR missions and (14) NEOs.⁹⁵ The Marine Corps already significantly engages in the gray zone with HA/DR and NEOs and it will need to continue to do so in the future.

In August of 2010, Defense Secretary Robert Gates said, “(t)he Marines in Iraq and Afghanistan have functioned for years as a so-called second land Army.”⁹⁶ Gates argues that the Marines need to “...preserve their ‘maritime soul’” and “fundamentally, the Marines do not want to be — nor does America need — another land army”.⁹⁷ In every major United States conflict since World War I, the Marine Corps has been expected to become a secondary land force. This reality will not change in the future therefore the Marine Corps must always be ready to increase its numbers when asked by keeping a healthy reserve capable of conventional fighting.

Historically the Marine Corps proved that no matter the size of the force it has always been able to expand to meet the needs of the country in large scale conflicts. At the start of the 20th century there were 9,696 Marines and by the end of World War I (WWI) in 1918 there were 48,834 Marines that fought alongside the Army.⁹⁸ By the end of WWI, the Marine Corps was reduced to 19,432 Marines but would grow to 85,695 with WWII and grow again in the 1950s with the Korean War and Cold War to 175,571 Marines.⁹⁹ The start of Vietnam in the 1960s expanded the Marine Corps to 309,771 Marines and with the end of the Vietnam War the Marines downsized to 185,250.¹⁰⁰ The 1980s saw a minor increase of the Marine Corps to 196,956 Marines with another downsize in 1990s to 171,154 Marines.¹⁰¹ After 9/11 the Marine Corps grew to 204,153 Marines and with the end of Operation Iraqi Freedom (OIF) and Operation Enduring Freedom (OEF) the Marine Corps is currently at 188,064 active duty

Marines.¹⁰² These fluctuations prove that the Marine Corps can fulfil its duties as the masters of the gray zone and when necessary grow quickly to support the Army during an interwar conflict.

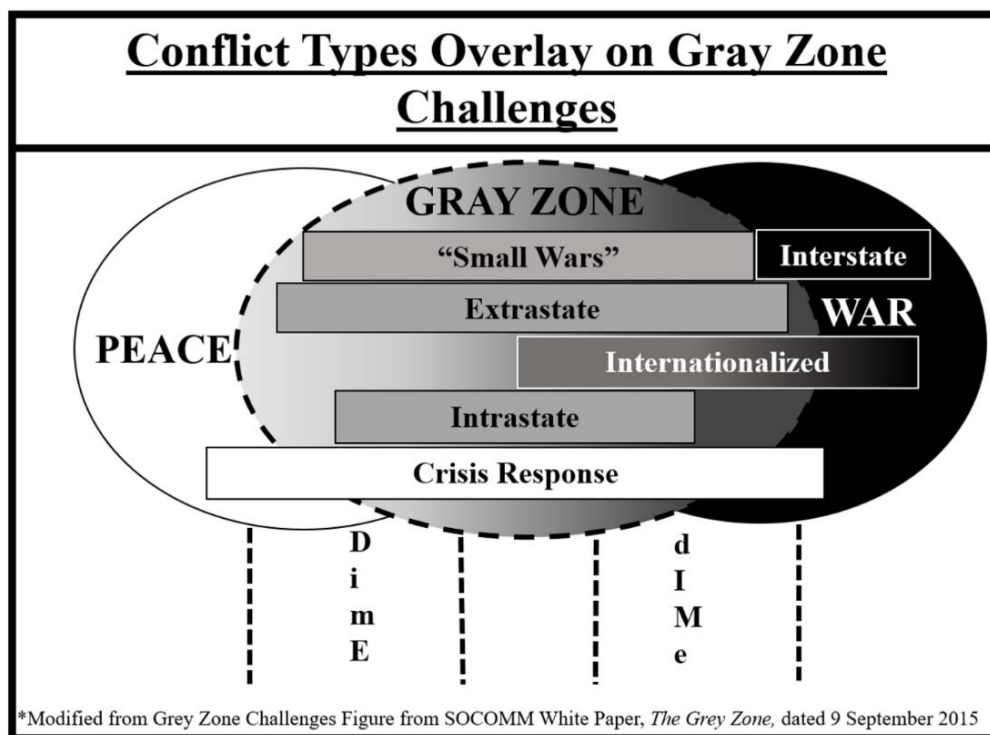


Figure 3¹⁰³

Figure 3 is a depiction of the relationship between gray zone challenges, small wars, interstate conflicts, intrastate conflicts, extrastate conflicts, internationalized conflicts and the Marine Corps mission of CR. Coupled with the UCDP data, there is a high probability that the United States military will be deployed against gray zone challenges in the future. Figure 3 shows that the Marine Corps currently operates in the gray zone with a SPMAGTF CR force. However, SOF is currently the primary force for gray zone missions because of their IW training and capabilities. Unfortunately, the Marine Corps continues to focus on its role in an interstate conflict, justifying its actions through worst case preparation, Title 10 responsibilities and historical conventional conflicts.¹⁰⁴

Why Now?

American politicians, military leadership and citizens have realized over the last 14 years that the character of war has changed and therefore how America approaches conflict must change.¹⁰⁵ In his 2016 article for the Heritage Foundation, Dr. Frank Hoffman concluded that America's "...security is predicated upon its national security community's being aware of the enduring continuities of war and possessing an adaptive ability to counter the many forms that warfare can take."¹⁰⁶ Prior to the new normal, the perception of a threat in popular America was focused on interstate conflicts with nations like China and Russia, not terror groups like Daesh.¹⁰⁷ This shift is visible in the funding for SOF operations during the last couple years of sequestration and military budget cuts. Even in the current fiscal environment where each service and the Marine Corps experienced significant budget cuts, SOCOM's budget increased. In FY2016 Congress increased SOCOM's budget proving that America's political leadership values its gray zone focused force.¹⁰⁸ Should the Marine Corps choose to absorb some of the overt SOF missions it could justify additional funding for advanced training and equipment. Even with approved funding, military intellectuals and SOF leadership have identified a capability gap to meet the number of gray missions and the operational tempo is causing SOF to "fray" at an unprecedented rate.¹⁰⁹ Ultimately, SOF needs one of the conventional forces to take on some of the gray zone missions in order to relieve the amount of stress on its force.

With the drawdown and the release of the Joint Forcible Entry (JFE) Publication encouraging all services to develop a forcible entry capability, General Amos briefed Congress that the Marine Corps is at a "strategic inflection point", referring to the shift of the Marine Corps from its land based operations in Afghanistan back to its amphibious roots and the reestablishment of its role as a middle weight force.¹¹⁰ Now is the time to decide and implement any major changes. Doing so will allow the Marine Corps the time to train, man and equip itself

for gray zone conflicts appropriately and efficiently utilize the time between now and the next gray zone challenge it is employed to address.

Recommendations

With the Marine Corps, Army, Navy and Air Force focusing their resources and training to effectively fight an interstate conflict and SOCOM focusing its efforts on the gray zone, America's military is an unbalanced conventionally heavy force. This force must rebalance in order to ensure it can successfully address the likely gray zone conflicts of the future. The Marine Corps is the only logical choice to support the realignment because it is currently conducting gray zone operations and demonstrating its ability to form adaptable and flexible SPMAGTFs. The Army, Air Force and Navy must remain domain focused because of the specific expectation for them to dominate in their respective domains during an interstate conflict. As the Marine Corps restructures itself back into a middle weight force, it should inherently assume the preponderance of missions that occur between peace and interstate conflict. By truly becoming the middle weight force of the future, the Marine Corps will bring balance to the capabilities of the American military. However, this shift towards the gray zone will require the Marine Corps to increase its ability to conduct IW by focusing on mastering distributed operations, developing specialized culture and weapons skills and becoming a lighter force.

An alternative option for the gray zone missions would be for the Army conduct gray zone missions. However, this would require the Army to create a unit with capabilities similar to a SPMAGTF with a GCE, ACE, LCE, CE in order to match the capabilities that the Marine Corps already has. While this is possible, it would take less time for the Marine Corps to assemble a similar trained SPMAGTF because it has conducted these types of missions since

WWII. This would also require the conventional Army to train its forces to operate in smaller forward deployed teams with a small footprint and such a move would detract from the large conventionally focused mindset that is expected of it during interstate conflicts.

The Marines are ideal to balance the force because they are already forward deployed, employ a MAGTF mindset and already conduct operations in the gray zone. The forward deployed MEUs and SPMAGTFs provide America with an independent and uniquely tailored force, capable of sustaining operations ashore quickly. The Marine Corps' MAGTF mindset ensures each Marine embraces the concept of combined arms. Finally the SPMAGTFs currently conducting crisis response represent current Marine Corps operations in the gray zone. Each of these characteristics prove that the Marine Corps is the logical choice for gray zone operations. However, changes are still necessary for the Marine Corps to adapt to gray zone missions.

EF-21 is a starting point for the Marine Corps; however, it will not achieve the needed balance by itself. While EF-21 provides the initial guidance and action to get the Marine Corps to slowly embrace the concept of CLTs and crisis response, it still maintains the Marine Corps' focus on conventional warfare. Just as SOF have focused on IW and asymmetric capabilities in the gray zone, the Marine Corps should work on employing small teams and conducting similar distributed operations. Concepts like CLTs allow the Marine Corps to support distributed operations and lessen the threat perception of American units operating close to near peer borders. With a smaller foot print, CLTs also would allow the Marine Corps the ability to take better advantage of smaller forward bases where space is limited, allowing Marines to be more responsive to regional crisis. Finally, operating in smaller base units will impact how the Marine Corps mans, trains, and equips.

The shift towards the gray zone will determine how the Marine Corps mans, trains and equips itself in the future. The details of how this force would look is a topic for another paper. However there are some generalities that should be considered for gray zone operations. The Marine Corps must train to operate in smaller distributed forces. The Marine Corps will also need to become lighter in order to increase maneuverability and to maximize the capabilities of its helicopters. The most expensive and important investment for the Marine Corps during this shift will be in the Marines themselves. Just as SOF attends advanced schools in order to enable their small unit capabilities while deployed, so too should the Marine Corps. Marines should be sent to advanced schools in order to foster the skills necessary to support small unit distributed operations for a sustained period of time. On top of advanced weapons employment, culture, language and communications training, the enabling Marines will also require advanced specialty training with the goal of this training being a CLT that can self- sustain for a desired period of time.

In order to foster professional development, the gray zone enablers such as Foreign Affairs Officers (FAOs), Regional Affairs Officers (RAOs), SFAs, Joint Terminal Attack Controllers (JTAC), Civil Military Operations (CMO) Marines and Information Operations (IO) Marines should receive a permanent MOSs. These specialists should also be aligned and working as liaisons to other agencies within the government to include the United States Agency for International Development (USAID), Homeland Security (DHS), the Federal Bureau of Investigation (FBI) and even the Federal Emergency Management Agency (FEMA). Such relationships will provide new perspectives on how to engage the civilian populations around the world.

Distributed operations will inherently require the Marine Corps to better integrate with interagency partners. The preponderance of gray zone clandestine missions should continue to be the responsibility of SOF while the Marine Corps becomes responsible for overt mission sets such as training, advising and partnering with foreign nations, raids and conducting unconventional missions around the world to promote global stability. Integrated training with SOF and interagency partners should become commonplace for the Marine Corps in order to learn from language and culture experts and to leverage each agency's strengths while deployed.

Finally, the Marine Corps should not completely abandon its conventional and heavy capabilities. Rather, it should shift its heavy capabilities to the reserve in order to allow for a quick transition should the Marine Corps need to support an interstate conflict again.¹¹¹ Heavy capabilities should be any equipment that cannot be externally lifted by helicopters in the Marine Corps inventory. By moving heavier conventional capabilities that Marine aviation cannot lift, such as tanks and some of the engineering equipment, to the reserves, the Marine Corps will open up ship space for newer lighter technologies and equipment. It would create the necessary space in the active duty force to reshape the force and build gray zone capabilities, manpower and equipment sets. Ultimately, operating as small units, with lighter equipment sets could allow the Marine Corps to become light enough to make aviation the primary ship to shore connector. The last benefit to this transfer would be the potential savings of transferring the equipment to the reserves that could be reinvested into more advanced training and technology.

Challenges and Potential Solutions

Some may challenge that a shift away from a conventionally focused force would contribute to a Marine Corps that is unprepared for the next interstate conflict. The opposite is true, as the force will actually be better trained, equipped and forward deployed to execute gray

zone and conventional missions either massed or distributed. To address the conception that unconventional forces may not be able to conduct conventional warfare, consider the Marine Raiders at Guadalcanal during WWII who were an unconventionally trained force conducting a conventional mission and killed an estimated 500 Japanese forces while only losing 16 Raiders.¹¹² The advanced training and equipment would only improve the capabilities of a conventionally focused force. In today's Anti-Access and Area Denial (A2AD) threat environment, the ability to conduct distributed unconventional operations would also serve as a force protection measure. Although the Marine Corps would retain the capability to become a conventional force, these forces should never be needed if the Marine Corps and SOF are successful in the gray zone.

Many will argue that the movement of tanks and other heavy equipment to the reserves would be accepting an unreasonable amount of risk against a large armored force and while conducting forcible entry missions. If the Marine Corps did enter into an intrastate conflict against a highly armored force, it would employ a combined arms capability, specifically utilizing air power to mitigate the impacts of an armored force. Should a mission to conduct forcible entry arise, the Marine Corps will not conduct this mission alone. Such an effort would be a joint operation per the JFE, resulting in significant armor being deployed by the Army.

While establishing the funding for the training and technologies will be a challenge in the beginning, it is a challenge that will easily be overcome as the Marine Corps operates in the gray zone. In order to receive funding for gray zone training and equipment, the Marine Corps can no longer afford to shortchange itself. For years the Marine Corps has argued that it can do more with less. This is no longer true. If the Marine Corps is going to master gray zone operations it must compete for funding by operating and succeeding in the gray zone. Fortunately by

becoming the nation's gray zone masters and interoperating with SOF, the value of the Marine Corps will be better realized as Marines conduct missions ranging from HADR to intrastate conflict with foreign involvement, ultimately justifying the increased funding.

Should the Marine Corps truly embrace its role as a gray zone force, it will need to address additional issues before executing such a change. Research is necessary to identify the exact capabilities of this gray zone force which will determine how the Marine Corps will organize, man, train and equip a force capable of achieving success in the gray zone. Another interesting area of future research would be to identify how the lack of a middle weight force has contributed to the current operational environment and if America can afford to continue turning its middle weight force into a heavy force during interstate conflicts. The answers to these questions could identify if the Marine Corps should become a conventional force during an interstate conflict and the dangers of not maintaining a middle weight force to engage in the gray zone for an extended period of time.

Conclusion

The shift in operational environment towards gray zone challenges has contributed to a change in the character of war which in turn demands changes in how the Marine Corps thinks and develops. The future Marine Corps needs to avoid the siren's song of a conventionally focused strategy and become a force capable of fighting and sustaining gray zone operations. If the Marine Corps continues to marginalize its gray zone capabilities, SOF will continue to fray and the United States military will remain heavily weighted for an interstate conflict, lowering its readiness for intrastate conflict. Ultimately, the United States needs the Marine Corps to become the masters of gray zone operations to bring balance to the nation's force.

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