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This paper analyzes historical long-term military commitments such as the Banana Wars, operations in the Philippines from 1898-1922, pre-World War II (WWII) operations in China, and the occupation of Germany and Japan post-WWII to determine the merits of utilizing persistent forces (forces positioned in an area for an extended duration) instead of rotational forces to create a stable and lasting environment in a nation-state. Additionally, analysis of current GFM requirements over the last twenty years will help determine which method is more efficient and likely to help sustain U.S. control of national interests.

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TITLE:
**THE MARINE CORPS AND SUSTAINED FORCE PROJECTION: HOW LONG-TERM
POSITIONED FORCES CAN ACHIEVE EXTENDED STABILITY IN FOREIGN MILITARY
COMMITMENTS**

SUBMITTED IN PARTIAL FULFILLMENT
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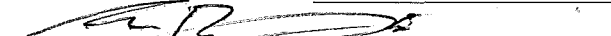
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Executive Summary

Title: The Marine Corps and Sustained Force Projection: How Long-Term Positioned Forces can Achieve Extended Stability in Foreign Military Commitments

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Thesis: The use of rotational forces to achieve stable conditions in foreign areas that lack governance is less effective than utilizing a long-term positioned force. Through historical analysis, one can determine that forces that remain in an area for a defined, extended period can more efficiently improve a nation-state in disrepair, which will create a longer period of stability, if not ensure peace.

Discussion: The Marine Corps continually utilizes rotational forces to satisfy Global Force Management (GFM) requirements, even during protracted military commitments, which risks reducing the future readiness required to support conflicts with state actors. The Marine Corps maintains a high number of rotational requirements that have typically consisted of Special Purpose Marine Air Ground Task Forces (SPMAGTF), Marine Expeditionary Units (MEU), the Unit Deployment Program (UDP), and conflicts with non-state actors such as Operation Enduring Freedom/Freedom Sentinel, Operation Iraqi Freedom, and Operation Inherent Resolve. These operational requirements are in addition to those that have been identified as essential to theaters or contingency as required.

Recently, the 2017 *National Security Strategy* and the 2018 *National Defense Strategy* have reemphasized the need for the Department of Defense to focus on preparedness for great power conflict. There is historical context that suggests the Marine Corps has a high quantity of operational commitments during a period not characterized by large-scale conflict and thus, is less prepared to facilitate national interests during the future conduct of war.

This paper analyzes historical long-term military commitments such as the Banana Wars, operations in the Philippines from 1898-1922, pre-World War II (WWII) operations in China, and the occupation of Germany and Japan post-WWII to determine the merits of utilizing persistent forces instead of rotational forces to create a stable and lasting environment in a nation-state. Additionally, analysis of current GFM requirements over the last twenty years will help determine which method is more efficient and likely to help sustain U.S. control of national interests.

Conclusion: Analysis of each commitment will determine how best to achieve long-term sustainment of an objective. Rotational forces should not/cannot satisfy all requirements, as some lengthier commitments in foreign areas can more efficiently achieve stability through the use of persistent forces.

Preface

I began this project with the intent of providing recommendations as to how the Marine Corps can maintain readiness amid a significant amount of commitments. When troop commitments were at their highest during Operation Enduring Freedom (OEF) and Operation Iraqi Freedom (OIF), leaders at all positions struggled to maintain a high level of readiness. Putting intrinsic concerns about the morale aside, for nearly ten years the Marine Corps provided task-organized forces to MEUs, OEF, and OIF, increasing the capacity of these forces while straining the capability.

Currently, the Marine Corps faces more commitments than it has in the last ten years. In addition to consistent MEU requirements, the Marine Corps maintains General Purpose Forces in Operations Freedom Sentinel and Inherent Resolve while reinvigorating its commitment to UDPs and adding commitments in the form of SPMAGTFs. Due to major troop drawdowns in Iraq and Afghanistan, the utilization of rotational forces has sustained these commitments and have resulted in a service that has increased the need to generate forces. This has additional impacts outside of personnel, as the constant use of equipment for operations degrades capability. If it is necessary for the service to maintain its high number of requirements for the foreseeable future, then the Marine Corps must determine if establishing stability can occur outside of the use of rotational forces. This study will not attempt to answer all the questions related to GFM requirements or the problems associated with creating a stable environment, but will at least begin the conversation about this crucial issue.

Table of Contents

	Page
DISCLAIMER	1
EXECUTIVE SUMMARY	2
PREFACE.....	3
INTRODUCTION	6
HISTORICAL EXAMPLES.....	8
Banana Wars	9
U.S. Operations in the Philippines	17
U.S. Operations in China	19
Post-WWII Occupation, Germany and Japan.....	21
REQUIREMENTS 2009-2019	25
GFM Requirements.....	25
CONCLUSION.....	28
BIBLIOGRAPHY.....	35

Introduction

As a superpower, the United States (U.S.) has far-reaching influence throughout the world and commonly deploys military forces to secure/protect national interests, which at times forces other states to maintain the international order. The Department of Defense (DoD) defines ‘Force Projection’ as the projection of the military instrument of national power from the U.S. to another area, in response to requirements.¹ The requirements associated with Force Projection come in all forms—theater security cooperation typically to build capacity/capability in a partnered nation, contingencies, or crises—where the U.S., since 1798, has continually deployed military units in support of these various requirements.² The Marine Corps typically satisfies requirements with rotational forces—those that deploy to a foreign area for a short period to achieve those requirements. Permanently stationed military forces—units that reside in an area for an extended period of time—is another method the DoD uses to achieve objectives. Although permanently stationed forces are typically not used outside their intended purpose, e.g. deploy to other areas to satisfy requirements, there are notable exceptions such as III Marine Expeditionary Force in Japan who has permanently stationed personnel that are considered ‘forward deployed’, or the mobilization of the occupation forces in Japan to support the Korean War. The personnel in persistent forces may rotate to another area or demobilize, but an element of that unit remains if only the name and headquarters. The utilization of military forces in a rotational manner reduces the long-term footprint and minimizes costs, among other benefits. However, the U.S. must be wary of using rotational forces to achieve requirements in situations where the military will see an extended commitment in a region. Presently, the Marine Corps has become accustomed to only using rotational forces to achieve objectives. This study suggests that there is a more efficient method, particularly in the case of attaining stability in a nation-state that has been devastated by war or lacks a functioning/legitimate government. Historical trends may suggest that the more efficient and successful method of sustained force projection is using persistent forces as opposed to rotational forces.

Currently, the U.S. military has more than 226,000 Department of Defense (DoD) personnel permanently stationed overseas, and of those, more than 172,000 are active duty servicemembers.³ There are an additional 38,000 active duty servicemembers stationed overseas, of whom the DoD has acknowledged, but will not specify their location or duty.⁴ For simplicity, future references of strength levels will focus on active duty personnel rather than reserves, National Guard, or DoD civilians. Highlighted commitments include the largest concentrations: Germany, the home of European Combatant Command and the heart of U.S. commitment of Europe/defense against Russia, at 35,000; Japan, the strategic center of the U.S. efforts in Asia, at 54,000; and finally, the Republic of Korea at 25,000, mostly there to deter North Korean aggression and provide for the defense of the peninsula in case of attack. For this study, these active duty personnel are referred to as persistent forces, which are employed in a manner that facilitates an objective over an extended period of time. The figures above, however, do include rotational forces such as those deployed in support of operations, which consist of the 8,000 in Iraq or the 11,000 deployed to Afghanistan. Overall, the DoD maintains a military that is just over one million strong.

There has been significant research regarding troop levels and their steady decline as America continues its enduring military efforts in multiple countries, but most of this data is taken out of context or conflated because few civilian organizations understand the difference between rotational and persistent forces. Most data concerns the total number of personnel overseas regardless if they are deployed personnel or permanently stationed there. Pew Research, utilizing information from the Defense Manpower Data Center, published an analysis in 2017, clearly stating that troop levels overseas were at their lowest in years and continue to dwindle.⁵ Conflations such as when Korea had 71,000 U.S. personnel stationed there in 1957, in stark contrast to the earlier stated figure, fail to take into account that the U.S. military had 2.7 million people at its disposal in 1957. Research has shown that in today's age, one percent of the American population serves in the military compared to nearly twelve percent during World War II.⁶ However, therein lay the problem: with a large number of U.S.

personnel deployed or permanently stationed overseas, the military is slowly shrinking in size over time (Figure 1).⁷

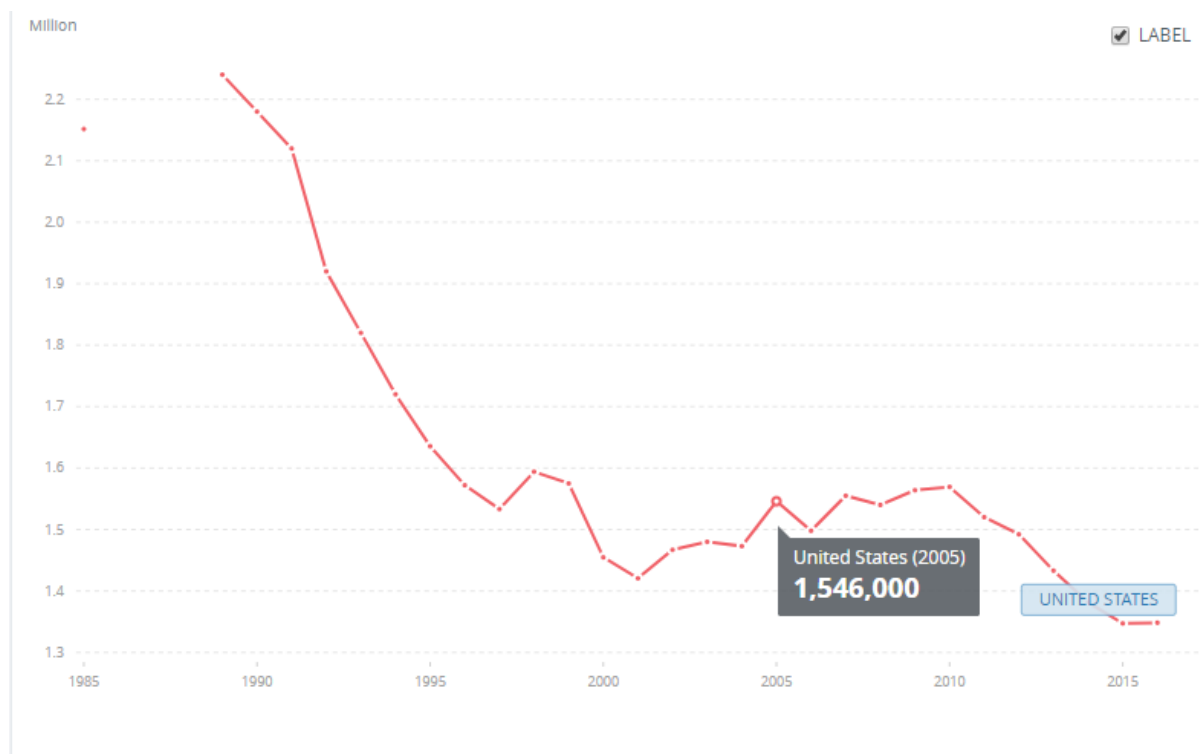


Figure 1. U.S. Military Personnel since 1985 in Millions

The increased commitments from Overseas Contingency Operations (OCO) that began with the Global War on Terror (GWOT), overstretches the U.S. military. This study will analyze historical examples that utilized rotational and persistent forces to achieve policy objectives. The analysis will determine if there is merit in proposing that sustained force projection and stability in a foreign area requires a capable and long-term positioned military force.

Historical Examples

U.S. OPERATIONS IN THE BANANA WARS

Historical Context. The Banana Wars is an accumulation of limited U.S. actions in numerous Latin American countries in the 1900s. Although specifics of the Banana Wars continue to be a subject of debate, for this study, analysis will focus on the nations of Cuba, Dominican Republic, Haiti, Honduras, Panama, Mexico,

and Nicaragua. Historians widely regard the Banana Wars as unnecessary American intervention and to some extent, coercion relating to properties that Spain ceded to the U.S. post-Spanish-American War.⁸ In the wake of a Venezuelan financial crisis in which military interventions by invested European powers received greater financial restitution than the U.S., an addition to the Monroe Doctrine referred to as the Roosevelt Corollary was created to prevent future European interference with U.S. interests in the western hemisphere. The Roosevelt Corollary established that the U.S. would intervene in Latin American affairs as necessary to secure its interests, including economic investments.⁹ When reviewing the following countries in the context of how to best achieve sustained force projection, there are compelling examples of the utilization of both rotational and persistent forces.

Cuba. The U.S. was involved in military operations in Cuba prior to the Spanish-American War, but the first intervention as part of the Banana Wars was an action in September 1899, which lasted until 1902. This action saw persistent forces achieve significant infrastructure improvements in Cuba: providing food to the hungry, imposing necessary sanitary standards, erecting thousands of schools, and even curtailing yellow fever amongst the populace. The U.S. saw the benefits returned through the Platt Amendment, which among other conditions, provided the U.S. long-term leases on forward naval bases in Cuba, one of which became the U.S. Naval Base at Guantanamo Bay. In 1906, when intervention became necessary again, a 5,000-man persistent force was charged with restoring civil order and protection of the local populace amongst a Cuban revolution. This persistent force departed in 1909 after free elections the previous year, this time providing Cuba with its first trained military. Interestingly, American administrators in Cuba, to include Lieutenant General Robert Lee Bullard, commented that the 1909 departure was too soon and Cuba would need future U.S. military intervention. The U.S. military returned in 1912, to protect U.S. interests in Havana and again in 1917, during a period of instability to support the recently-elected and pro-U.S. president. U.S. forces remained until 1919, although two companies remained at Camaguey until February 1922. Although contested by the socialist Cuban government, the U.S. Naval Base at Guantanamo Bay remains the longest-maintained overseas base by

permanently stationed U.S. military personnel.¹⁰

Analysis. The Cuba case study presents multiple examples of the utilization of persistent forces. The initial application of persistent forces, following Spanish rule, established various facets of infrastructure that ensured Cuba, as a developing nation, could self-sustain. Had persistent forces remained on the island for an extended period beyond 1909, as warned by experts, it is likely that the future use of rotational forces would not have been required. However, as the subsequent military actions demonstrate, the fledgling nation required additional support to thrive as a government. Identity crises and corruption were a plague in early Cuba, which hampered development in the early years and led to continual instability. There is a multitude of factors in a state that contribute to stability; one of them is governance. Cuba saw numerous changes in governance post-Spanish-American War, most notably the rise of the socialist Cuban government. Socialist Cuba had objectives that, while conflicted with U.S. ideals, were able to provide legitimate governance to the people. As such, there was no use for either rotational or persistent forces for host nation security after the detachment departed in 1922. Cuba's existence as a socialist government is not indicative of a failed attempt to achieve stability. Cuba remains a successful example because of the absence of future U.S. intervention to support governance after the 1920s. The only use of persistent forces continues to be at U.S. Naval Base at Guantanamo Bay and that is due to Cuba's geostrategic importance.

The Dominican Republic. The Dominican Republic had its first U.S. military intervention in 1903, in which U.S. forces deployed to protect U.S. interests during a revolutionary activity in Santo Domingo. In 1904, military personnel redeployed to Puerto Plata, Sosúa, and Santo Domingo City to prevent revolutionary action from impacting the U.S. In 1914, American servicemen deployed again to stop the bombardment of Puerto Plata, this time with the use of lethal force from naval vessels. The U.S. maintained Santo Domingo City as a neutral zone via a threat of force. From 1916 to 1924, the U.S. military established marshal law with persistent forces to re-establish civil order and impose governance. With a ground force no larger than 3,000 Marines, persistent forces made remarkable improvements in the nation: building schools; developing infrastructure;

improving public health (thus, significantly increasing the population size); instituting tax reforms; and even building a viable police/military force.¹¹

Analysis. With the Dominican Republic case study, the U.S. military deployed multiple times utilizing rotational forces. However, in 1916, the deployment of persistent force created an environment that facilitated a stable Dominican Republic, as there was not a single U.S. military unit deployed again to the state until 1965. The use of persistent forces for a relatively small period in history afforded forty-one years of stability. This serves as another example of how a persistent presence can achieve a significant amount of progress.

Haiti. Though U.S. military action in Haiti occurred prior to the end of the Spanish-American War, the most significant actions occurred throughout the 1900s when military personnel deployed twenty-eight times to protect American nationals during revolutionary activity and civil unrest. Haiti's history is rife with civil conflict, suffering 102 civil wars/revolutions since gaining its independence. Haiti was of growing importance to the U.S., after the establishment of the Panama Canal. In 1914, the Haitian President, in fear of a bloody coup, requested U.S. military support, which Congress approved, mostly due to the significant debt Haiti owed to the U.S. The following year, the U.S. redeployed military personnel to Haiti, but this time they remained on the island until 1934, to maintain order during a period of political unrest.¹²

Analysis. Rotational forces deployed to Haiti in multiple times of crisis. In 1915, a persistent force deployed to Haiti and remained until 1934, purely to preserve order and ensure Haiti could provide governance to its people. Although there was a treaty between the two nations, most of which was forced upon the Haitian government, the occupation was a significant military effort, with broad support from the State Department. But the long-term consequences of the occupation were of substantial benefit for Haiti. Since the nation existed in disrepair and lacked even a trafficable road network, the persistent forces facilitated significant infrastructure development that greatly enhanced internal commerce. Additionally, the sanitary conditions across the nation were utterly subpar, to include the absence of waste management or sanitary standards for defecation. The military was essential in establishing public health reform and establishing sanitation laws. Over time and under

the supervision of persistent forces, Haiti grew to have a functioning government that no longer required military supervision. After the persistent forces left in 1934, U.S. military forces did not deploy to Haiti again until 1993, to enforce a U.N. embargo. Military action had a direct impact on a state that provided seventy-nine years of stability.¹³

Honduras. Although most historians only recount American intervention in Honduras in the mid to late 1980s, U.S. action traces back to the early 1900s. Intervention began in 1903, when revolutionary activity threatened the safety of the U.S. Consulate and the steamship wharf at Puerto Cortez. In 1907, U.S. forces deployed to protect U.S. interests during a war between Honduras and Nicaragua.^{CRS} In 1911, the U.S. redeployed military personnel during a civil war to protect American citizens and interests. Then in 1912, the U.S. military landed a small contingent to protect an American-owned railroad at Puerto Cortez that was in danger of being seized by the Honduran government. These forces withdrew when the U.S. government disapproved of the action. In 1919, another U.S. military contingent landed in a neutral zone to maintain order during an attempted revolt. In 1924, U.S. military forces deployed to Honduras to protect both Americans and U.S. interests during election hostilities. During a political upheaval at La Ceiba in 1925, U.S. forces deployed to Honduras in order to protect local nationals.¹⁴

Analysis. Honduras saw the use of rotational forces seven times in the 1900s. Honduras—in fact, most of Central America—was rife with political issues since gaining independence. Corruption, revolutionary movements, and interference from other Central American states created constant chaos. The U.S., under the William Howard Taft administration, enacted a policy commonly referred to as “Dollar Diplomacy,” which used diplomacy to advance U.S. financial interests and create stability abroad. The concept was a failure in multiple ways, and it used the military “. . . at the beck and call of the American dollar,” according to President Woodrow Wilson.¹⁵ Honduras is an example of how rotational forces struggled to achieve the stability that the employment of persistent forces saw in other cases. Thus, rotational forces demonstrate the general lack in

capability to do much more than provide a temporary solution to a problem and very rarely do they provide long-term stability.¹⁶

Panama. The U.S. has a long history with Panama that dates back to the 1800s when it was still a state of Columbia. For this analysis, the focus will remain on post-Spanish-American War activity. In 1901 and 1902, U.S. forces deployed to the State of Panama to protect U.S. interests. In 1901, the chief threat was a revolutionary action. In 1902, the principal danger was from the Columbian military; to the extent that the U.S. stationed ships on both sides of the isthmus. In both instances, U.S. forces committed to keeping railroad lines open. In the wake of the Panamanian Declaration of Independence in 1903—in which the U.S. quickly acknowledged Panama as an official state in order to facilitate the establishment of the Panama Canal—the U.S. Marines deployed to the isthmus from 1903 to 1914, although at times with brief breaks.

Although the purpose behind military action was for the protection of property and quelling civil unrest, on at least one occasion in 1912, the responsibility of the armed forces was to supervise elections outside the Canal Zone. Then from 1918 to 1920, U.S. forces redeployed to Panama in a police action (again during an election) to quell civil unrest. When tensions mounted between Panama and Costa Rica in 1921, the U.S. deployed naval forces on both sides of the isthmus to prevent war. Civil unrest in Panama in 1925 led the U.S. to deploy hundreds of troops to protect its interests, namely the Panama Canal.¹⁷

Analysis. Panama is an example of how the U.S., this time, utilized rotational forces rather than persistent forces to achieve long-term stability. U.S. rotational forces deployed twice prior to 1903. In 1903, the U.S. started to use persistent forces, which remained in the area intermittently, until 1914. Arguably, the lack of continuity, among other factors, required military forces to redeploy to the isthmus three more times until 1925. This reoccurring trend suggests that the U.S. military should not only deploy persistent forces to establish a semi-permanent presence. There are other examples in the Banana Wars that also prove this notion.

Mexico. U.S. interventions in Mexico—often characterized as a ‘campaign’ in the Banana Wars—involved military actions to protect U.S. interests and citizens, such as resolving border issues or policing

actions after the Mexican-American War; examples include the following: in 1859, the pursuit of Mexican bandit, Juan Cortina, past the Rio Grande; in 1866, a repudiated expedition to compel the surrender of bandits; in 1870, the destruction of a run-aground pirate ship; and finally, between 1873-1896, the pursuit of bandits and thieves. The last instance of U.S. military action in Mexico was between 1918-1919, when U.S. forces pursued bandits on three occasions in 1918 and six in 1919.¹⁸

Multiple cases of military action existed that were, at times, in direct protest of the Mexican government, instances in which U.S. forces intervened in a fashion more consistent with the other conflicts in the Banana Wars. In 1876, U.S. Marines dispatched to Matamoros to protect both American citizens and property. In the heat of the 1913 Mexican Revolution, U.S. Marines deployed again to protect American citizens at Estero de Ciaris and to quell civil unrest. The most notable occurrences were from 1914-1917, which consisted of a number of undeclared hostilities between the Mexican government and the American government to include the Dolphin affair, which led to the American occupation of Vera Cruz in 1914, Villa's raids, and Pershing's punitive expedition. There was also a final state-sponsored conflict in August 1918, when American and Mexican troops fought in Nogales, Arizona.¹⁹

Analysis. Mexico is an outlier in comparison to other historical cases. As a state with a functioning and legitimate government prior to U.S. intervention, it should not have required the use of persistent forces. The rampant civil strife, revolutionary movements, and developing national legislation did not create an orderly nation-state. In the 1900s, the continually transforming and at times oppressive Mexican regime created disorder and allowed criminal activity to constantly challenge the U.S.'s ability to provide security along the border and to its interests, which included a billion dollars (or twenty-six billion in 2019) in investments and 40,000 expatriates. This created a standoff that gradually escalated to an American-plotted attempt at regime change, which resulted in the occupation of Vera Cruz. Along with the resignation of the oppressive Mexican president, Victoriano Huerta, other military contributions to long-term stability included sanitation reforms and

a significant reduction in both crime and corruption—albeit at gunpoint—that resulted in a rapid drop in the mortality rate.

The inclusion of Mexico in this study is an example that illustrates that the utilization of rotational forces for contingencies can achieve a limited objective. The challenge was how to promote long-term security of U.S. borders, commercial interests, and its citizens with a precise application of military force during a time when order or justice did not prevail in Mexico. Strategists, policy makers, and leaders of government would argue that the Vera Cruz situation is a prime example in which to use rotational forces since the U.S. had no desire to implement its ideas or policies upon Mexico by force. One could argue, however, that the Vera Cruz action is evidence that military occupation of an area, a technique opposed by contemporary America, was the means in which the U.S. could accomplish this particular objective. However, with that premise lies an enduring commitment to sustain U.S. forces in a foreign area. It would have cost American dollars, lives, and multiple other resources, and would have required an American public that supported either the conflict or the political leadership that allowed U.S. forces to commit to it. Ultimately, a review of history reveals that America did not consider the long-term stability of Mexico a high priority. Instead, America preferred the limited use of military force to achieve a short objective. Thus, even though the U.S. achieved a limited win, the continual use of rotational forces demonstrates the effectiveness of a long-term solution.

Sustained force projection is a grave concern when considering the geostrategic significance that the Gulf of Mexico and the Caribbean carry for the U.S. since its development and rise as a superpower. The U.S. needs continual access to those areas for trade and naval shipping. But the overall prioritization of effort is one of the most important considerations when opting to utilize rotational instead of persistent forces.²⁰ The use of rotational forces succeeded in accomplishing short-term objectives to include a short-term occupation, which resulted in regime change. In addition, there was, to a degree, completion of U.S. policy objectives. However, the current transnational criminal threat that exists in Mexico, which at times conflicts with U.S. security, is evidence that U.S. military interventions did not achieve long-term stability.

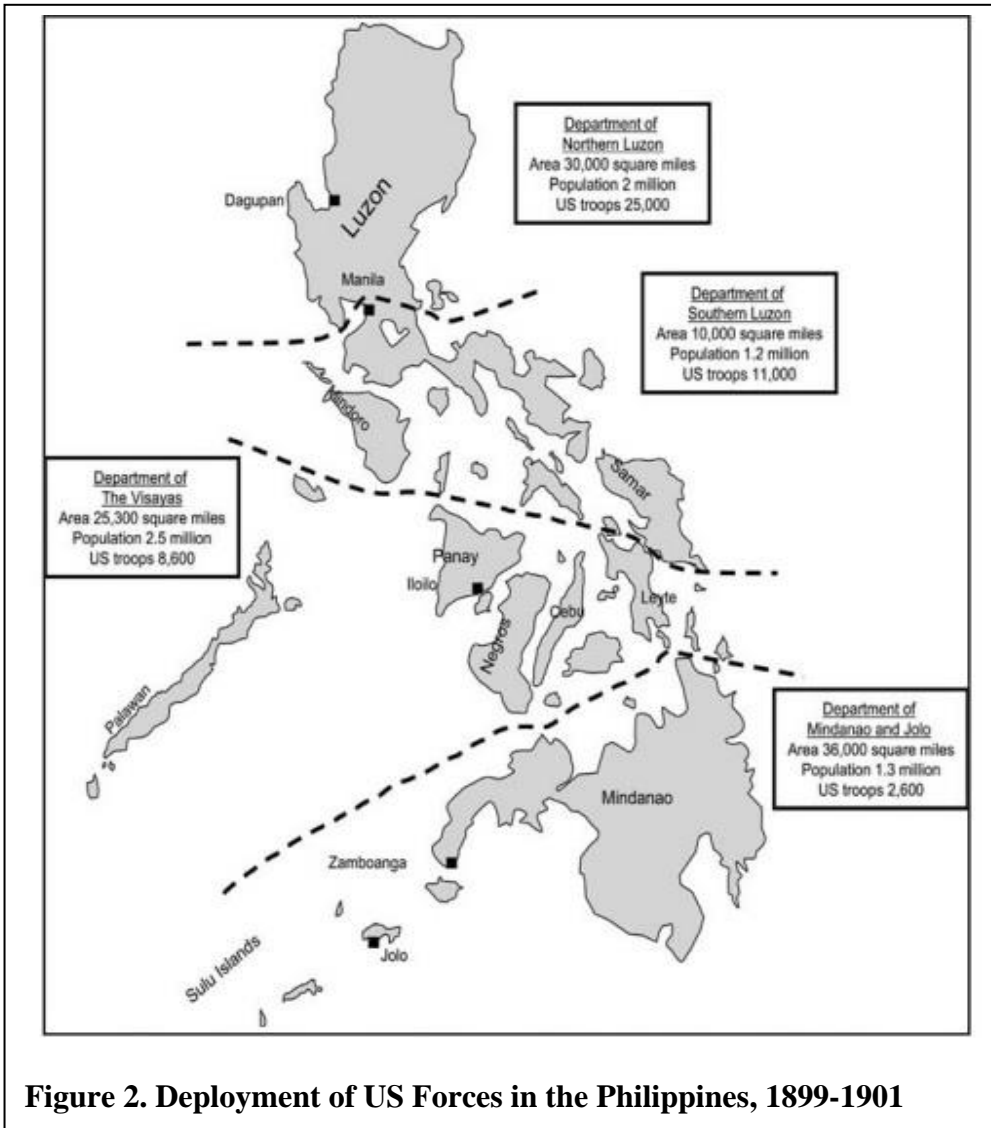
Nicaragua. The history between Nicaragua and the U.S. military dates back to 1853, with reoccurring actions in 1854, 1857, 1867, 1894, 1896, and 1898. The 1854 and 1867 actions resulted in destruction of property as a reprisal for slights against the U.S. Keeping within the constraints of post- Spanish-American War actions, the first of which occurred in 1899, American and British military forces landed at San Juan del Norte and Bluefields to protect each nation's interests. During a 1907 war between Nicaragua and Honduras, U.S. forces were stationed in multiple locations to protect U.S. interests, to include Trujillo, La Ceiba, Puerto Cortez, San Pedro, Laguna, and Choloma. U.S. forces returned to Bluefields in 1910, to again protect American civilians/interests and to assist in the removal of an oppressive regime. The longest duration of military action began in 1912 and ended in 1925, when the U.S. deployed a contingent to protect American interests and to support the legitimate government of Nicaragua during an attempted revolution. In 1924, recently elected President Calvin Coolidge made the decision to remove persistent forces, as Nicaragua had paid its debt and displayed all the markings of a functioning government: the regime took control over national railroads and banks, and under U.S. supervision, had free elections in 1924 (free elections are often the standard of measurement for when the U.S. government determines if a foreign state has achieved a functioning government). The Marine contingent withdrew from Nicaragua in 1925, even though the newly elected Nicaraguan government protested their removal, which proved valid when, shortly after the departure of the persistent forces, the former Nicaraguan President overthrew the incumbent, and U.S. Marines deployed back to the region in 1926. This began the second longest military action and last of that era, where 2,000 U.S. Marines deployed as a persistent force with additional surges reaching as high as 5,000 personnel, far more than had ever been deployed to the country. As guerilla action decreased and the government became more autonomous, troop levels slowly decreased. After eight U.S. Marines were killed in a guerilla ambush in December 1930, President Hoover made the decision to remove military personnel in Nicaragua after the 1932 elections. The last Marines left Nicaragua in 1933, and the U.S. military has not intervened in Nicaragua's affairs since their withdrawal.²¹

Analysis. Nicaragua is another example of how persistent forces can facilitate success. U.S. interest increased in the region due to some of the pro-imperialist policies of the time but also because of a genuine concern to provide security in a region that was vital to creation/maintenance of the Panama Canal. The U.S. deployed rotational forces to Nicaragua eight times before utilizing persistent forces in 1912. The 1912 action saw a rotational force deploy in response to a challenge against the legitimate Nicaraguan government. Additional personnel reinforced these Marines until the rebellion ceased, after which, a persistent force remained in the state for the next thirteen years and ensured the stability of the country. Although the Nicaraguan government, by their own admission, was not ready to provide governance without U.S. support, President Coolidge and his anti-imperialist administration forced that situation. The rapid destabilization of the Nicaraguan government after the Marines withdrew and the rapid re-deployment of Marines once the Nicaraguan coup was successful serves as a testament to why a persistent military force can accomplish stability: it is a fact that demobilization of persistent forces happened too quickly, and if they had remained in the area for a longer duration, the redeployment of persistent forces and the substantial loss of life would not have occurred. It also highlights the need for integration of objectives and clearly defined goals into foreign policy and strategy that can survive different U.S. administrations with opposing political views.²²

U.S. OPERATIONS IN THE PHILIPPINES

Historical Context. U.S. military operations began in the Philippines in May of 1898, as a result of the Spanish-American War. Commodore George Dewey with the U.S. Navy's Asiatic Squadron conducted the first military action of the war when he defeated the opposing Spanish vessels and subsequently seized Manila Bay. Major General Merritt led a 5,000-man contingent to hold the recently seized terrain.²³ The bay and its harbor were essential because the U.S. did not have a forward-operating base capable of providing sustainment to its vessels for continued operation.²⁴ Later in the war, U.S. forces captured the city of Manila and deployed 11,000 ground troops.²⁵ As part of the 1898 Treaty of Paris, Spain ceded part of the Spanish East Indies, including the

Philippines, to the U.S., which began the subsequent American occupation. During the Philippine-American War, U.S. forces deployed over 126,000 military personnel to the Philippines, with troop strength averaging 40,000 until July 1902 (See Figure 2).²⁶ In the post-war years of the Moro Rebellion, which lasted until 1913,



troop levels averaged 25,000. Post-Moro Rebellion, troop levels decreased to roughly 5,000 by 1935.²⁷ The Washington Naval Treaty of 1922 limited additional building of military fortifications, which limited a larger number of U.S. personnel stationed in the Philippines until post-WWII, again proving that the U.S. needed a forward-advanced base that could sustain forces. This long-term deployment of U.S. forces over several years is an example of the use of

persistent forces.

Analysis. U.S. operations in the Philippines from the end of the Spanish-American War until WWII serves as an excellent example of how the use of persistent forces created stability despite the fact that the total troop level increased and decreased from 1898 until 1941. And none of the military action was characterized as short deployments of ground combat troops. All deployments were long-term where at least the headquarters

remained even if personnel needed to return to the U.S. for various reasons, such as injury or conclusion of military obligation. The U.S. contribution to the Philippine's stability consisted of significant infrastructure developments. Persistent forces built schools, improved sanitation, provided vaccines to the populace, and established a justice system ran by the locals. Military action even inspired hundreds of young Americans to volunteer to travel to the Philippines to educate the locals. All of these actions contributed to the development of a nation that over time was able to govern itself, becoming the first Asian state to form a national legislature and even fought alongside the U.S. in WWII.²⁸ As the U.S. became a superpower, development of subsequent strategy—including the need for forward bases that facilitated sustained force projection—became essential to the implementation of military forces in the Pacific. This is evident through the continued maintenance of former U.S. military bases in the Philippines, such as Clark Air Force Base, which continued to be used long after the U.S. military ended its positioning of persistent forces in the state.

U.S. OPERATIONS IN CHINA

Historical Context. The U.S. had a long relationship supporting the Chinese prior to the end of the Chinese Civil War in 1949. Its inclusion into this study is distinctive because it represents almost one hundred years of the U.S. using both rotational and persistent forces to secure U.S. interests with force projection. It commenced in 1854, when the U.S., in conjunction with the British, sent U.S. Naval vessels and landed troops in Shanghai to provide security for interests during a period of civil strife. Similar instances occurred in 1855, when U.S. forces deployed again to Shanghai to protect U.S. interests and fight pirates. In 1856, amid hostilities between the Chinese and British, U.S. forces arrived in Canton/Guangzhou to requite an attacked American vessel. In 1859, American forces landed again in Shanghai to protect U.S. interests. In 1866, U.S. forces defended the American Consulate in Newchwang/Yingkou. From 1894-1895, rotational forces deployed to Tientsin/Tianjin to serve as an honor guard for a Chinese viceroy's visit and then again from 1898-1899, to provide protection at the American Consulate during hostilities between the Dowager Empress and her son.²⁹

The most significant event in military history with China was the Boxer Rebellion, beginning in 1900, when U.S. forces deployed to protect both U.S. citizens and non-U.S. citizens. In September of the same year, U.S. forces established a permanent garrison at Peking manned by Marines and in 1901, signed an agreement establishing a garrison in Tientsin manned by Army personnel in case of future incidents. In 1911, as the revolutionary movement began to rise, additional U.S. forces mobilized to Hankou, Nanking, Chinkiang, and Taku. The following year embarked upon a tumultuous time with the overthrowing of the last dynasty and the establishment of the Republic of China. The U.S. began a twenty-nine-year commitment with numerous demonstrations, landing parties, and additional military actions, all to protect U.S. interests in China. The previously mentioned garrison continued to be maintained as the line of communication to the sea and a force to protect American citizens/diplomats until 1941. As the Nationalist and Communist movements grew and combined into the National Peoples Party or Kuomintang (KMT) in 1925, rising tensions led the U.S. to reinforce the garrison with additional personnel and later evacuate American communities in Nanking. As the conflict escalated, the U.S. dispatched additional personnel to protect international communities in Shanghai and fight against the KMT. Concerned about the threat that a KMT-united China would create, the Japanese intervened on the premise of protecting its citizens. As the Japanese dedicated more military assets, the U.S. actually withdrew forces and concentrated them near the international civilian communities of the British, French, and Italians, which in contemporary terms would be considered a peacekeeping action.³⁰

U.S. military operations in China came to a close with the Mao Revolution. The year 1945 saw 50,000 Marines deployed to China, reinforcing the 60,000 U.S. military personnel that remained in China after WWII to assist with the repatriation of the Japanese, as well as controlling ports of embarkation/debarkation. This repatriation duty became the last U.S. military operation in support of the Chinese government.³¹

Analysis. China is an interesting example of force management: the U.S. saw the need to establish persistent forces in the country in 1900, when there was only one detachment based there, then reinforced U.S. forces with an additional 3,000-man detachment in 1901. This occurred after rotational forces had deployed

there seven times in the previous forty years. However during the 1900s, there were eighteen additional times prior to the start of World War I that the U.S. deployed rotational forces to the same state to serve national interests. This is a combination of using persistent and rotational forces to satisfy multiple requirements, which in the case of China, did achieve limited success until WWII and the Chinese Civil War. However, it is apparent there could have been greater success if the U.S. had the capacity to bolster forces to the point where the garrisons positioned in China had enough capability and manpower to achieve autonomy. This would have allowed the persistent forces to deal with emerging threats as well as provide the security needed in their assigned area. This technique would likely have prevented the U.S. from committing additional forces with an added benefit of ensuring long-term stability, if not peace. But the use of both persistent and rotational forces in a given area can be a critical method of sustained force projection, especially now, when DoD personnel have a litany of tasks across the globe: security, peacekeeping, defeating terror organizations, or deterrence.

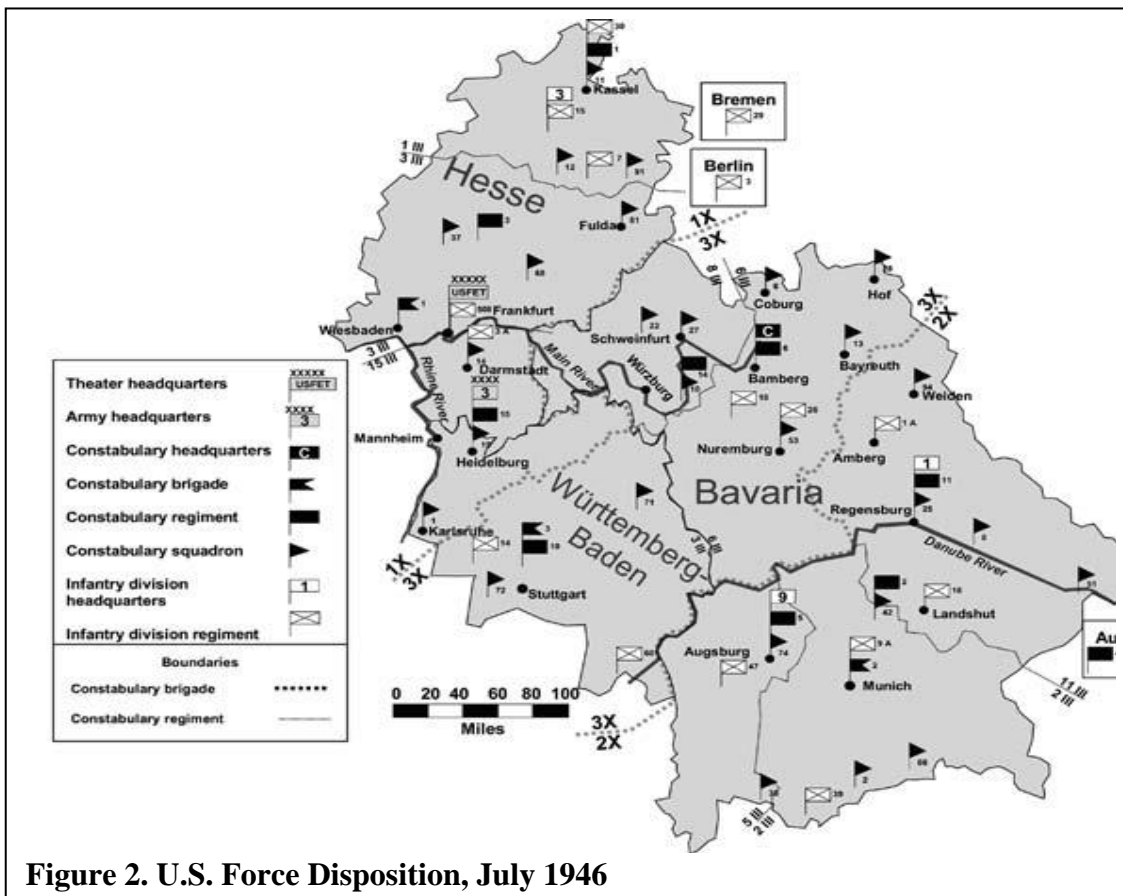
Although a review of history can unveil mistakes in national military strategy, these strategies should not be considered shortsighted. Most military experts could not predict who would win the Chinese Civil War, the spread of communism, or Japanese aggression in Asia during WWII. After WWI, the world at large sought to avoid great power conflict. All of these factors strongly contributed to a situation where the U.S. political leadership bypassed taking a more definitive stance regarding the issues of China and Japan. Retrospect suggests, however, that Japanese military action in WWII and the subsequent fall of China to communism could potentially have been offset by a persistently maintained U.S. military presence in China. Although, in order to achieve a desired state that would have seen a very different China in the twenty-first century, the U.S. would have needed a comprehensive foreign policy and national military strategy that used multiple tools of statecraft outside of military forces for the maintenance of security that supports national interests.³²

POST-WORLD WAR II OCCUPATION

Germany. The 1945 Potsdam Conference determined the American occupation of Germany and Japan, although Allied planners had been discussing relevant concerns since 1942.³³ For Germany, a key determinant

of the declaration was that four different allied powers—the Union of Soviet Socialist Republics (USSR), the U.S., France, and the United Kingdom (UK)—would occupy Germany. This was to facilitate complete disarmament and demilitarization of Germany: industrial sectors to support military operations, standing military, and armament production were all prohibited.³⁴ At the 1945 Yalta Conference, the U.S. and USSR previously agreed to split Germany into the aforementioned zones and with the goal of eventual reunification. The council of foreign ministers, made of representatives from each of the chief Allied powers, was responsible for implementing this quadripartite policy.³⁵ It is critical to remember that Germany had reached utter collapse following WWII; most major metropolitan cities were in ruins, the economy was in shambles, and the people were disillusioned.³⁶ The strategy for postwar Germany was a difficult problem for the Allies to solve, as it was

critical to avoid the mistakes made after WWI—namely, to remember that the economic prosperity of Germany was essential to that of Europe.³⁷ The Allied powers made careful consideration to allow for certain levels of redistribution from industrial resources,



not as reparation but for stability.³⁸ On May 8, 1945, which became Victory Europe (V-E) day, the U.S. had

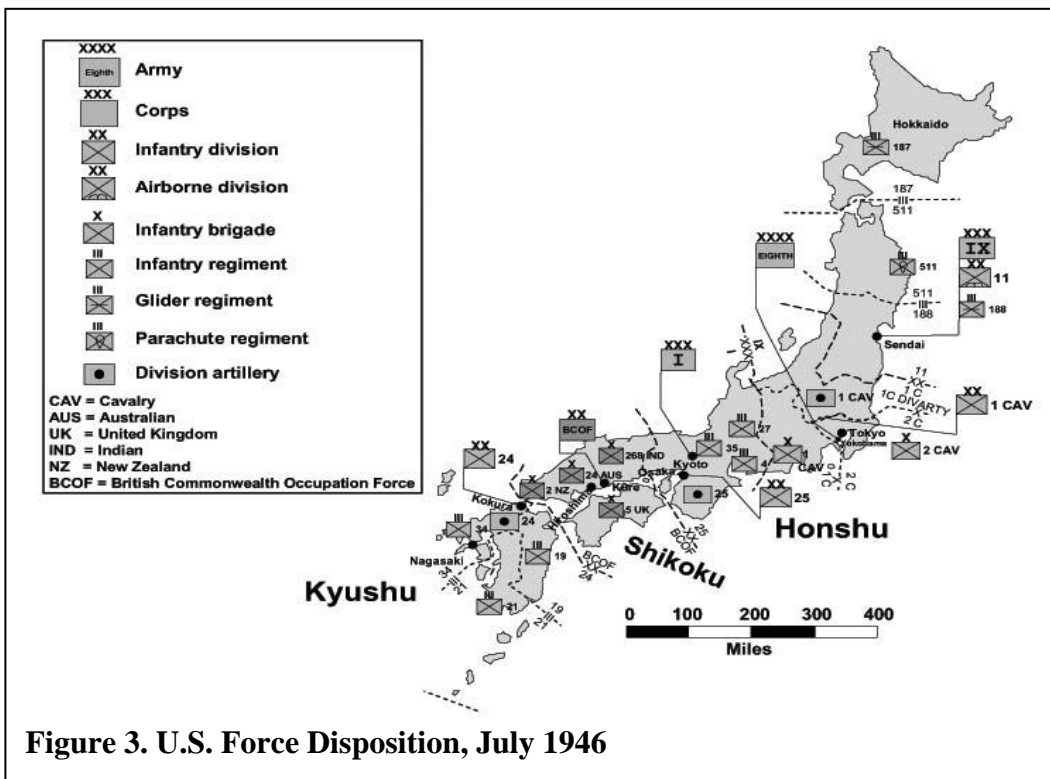
1,622,000 troops in Germany organized into fifty-nine divisions, fifteen corps, five armies, and two army groups. The total theater force was over three million.³⁹

A few months following V-E, the U.S. military maintained ten divisions and a few independent regiments.⁴⁰ The strength of this force, or the Occupational Troop Basis (OTB), was determined to be 404,500. This was later reduced to 370,000 after the Allies compelled the surrender of Japan in August 1945. Due to tons of excess and captured equipment in the American zone, the U.S. committed an additional 337,000 troops to the region by July 1946. Troop numbers decreased in the coming years due to the previously referenced strategy for Germany. The occupation force transitioned into one characterized as a policing force, referenced only by number of divisions instead of total manpower available. The total quantity of divisions initially forecasted to remain in Germany were three, with the policing action ending by 1950. In 1951, however, numerous changes to policy, Soviet action such as the Berlin Blockade, the expansion of Communism, and the establishment of NATO, all caused the U.S. to maintain five divisions in Germany.⁴¹ This force existed on the ideal of European defense instead of an occupation force. The Cold War delayed the reunification of Germany by decades, but when reunification did occur, West Germany was a prosperous, functioning nation. Ultimately, it was the military occupation of Germany, with significant civilian oversight, that ensured the nation-state could transition from an adversary during great power conflict to one that was considered an ally a short time later. And although there was some initial friction with the reunification of the two German states, as of 2017, Germany has maintained the fourth best economy in the world.⁴²

Japan. Although the U.S. and the UK called for the unconditional surrender of Japan following the Potsdam Conference, now known as the Potsdam Declaration, that surrender came months later, which then began the steps of the occupation of Japan.⁴³ Fifteen divisions deployed to Japan by October 1945, reduced afterward to four divisions for the occupation. The largest strength that occupation forces obtained was in the winter of 1945, at 354,000; after which, forces continued to decline as the U.S. demobilized units until August of 1946 (Figure 4). After the completion of these demobilization efforts, the number of divisions remained unchanged. The

manning of these divisions, however, suffered greatly with most units operating with manpower far below the number that would be adequate to conduct combat operations.⁴⁴

Unlike Germany, Japan was under the control of U.S. military leadership known as Supreme Command of Allied Powers (SCAP), led by General Douglas MacArthur. The USSR, UK, and China served in an advisory capacity on the Allied Council, but SCAP retained the ultimate authority in decision-making and conflict-resolution. Japan provides one of the first historical examples where military leadership had the ultimate authority regarding matters of state typically the U.S. government places a civilian leader over the military to oversee matters of governance that do not pertain to security, such as economic generation, managing resources, etc. There were three phases of Japanese occupation: punishment and reformation, revitalization of the



economy, and treaty. The first phase strongly resembled the initial actions in German occupation. SCAP punished Japan for its past actions—which included trials for war crimes—and simultaneously dismantled the Japanese military and imposed significant economic

restraints. There were some significant positives that occurred in the first stage: transitioning to a free-market economy, an empowered parliamentary system, and improved rights for women. Even more interesting, during the first phase of the occupation, there began an economic crisis in Japan—commonly referred to as the “Reverse Course”—where, because of the spread of communism in Europe and Asia, specifically China,

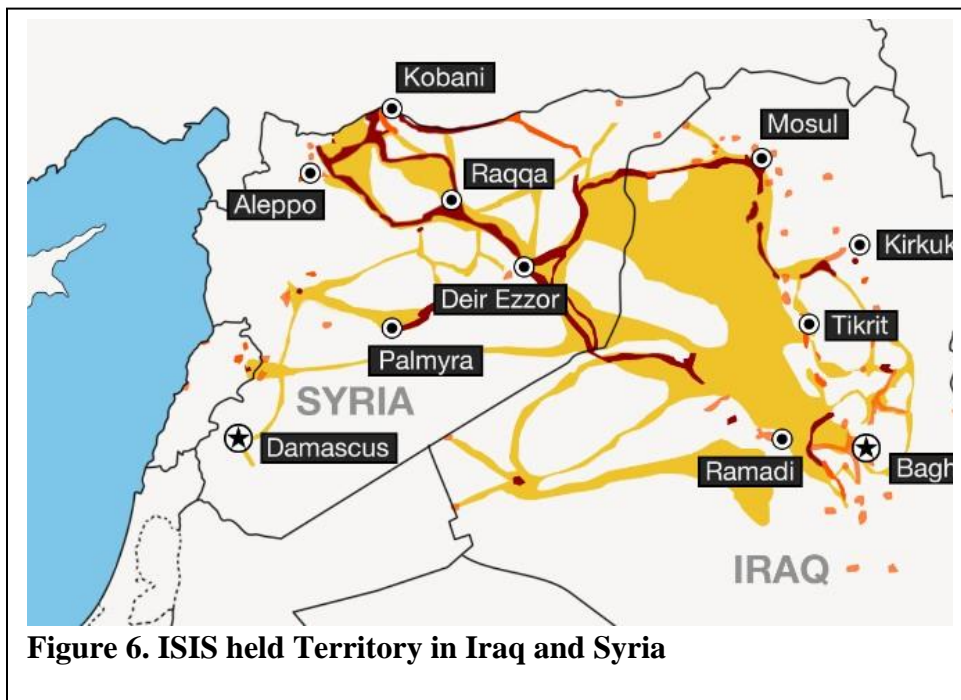
Japanese economic prosperity took center stage. SCAP was concerned with changing the economic situation to prevent further expansion of communism. The most significant problem that Japanese industries faced was the acquisition of raw materials needed for finished goods. The Korean War solved that problem because Japan then became the primary supply terminus for the United Nations and also received reassurance that the U.S. would ensure its security in the presence of a threat.⁴⁵ The Korean War served as an unofficial end of the occupation. The 132,000 troops stationed in Japan at that time deployed to Korea to support the war.⁴⁶ The third phase ended in 1952, with a peaceful transition in which forty-nine states, minus the USSR and satellite states, ratified a treaty.⁴⁷ Although the U.S. has maintained a presence in Japan to support mutual defense, Japan has completed one of the most successful post-war transitions of any state defeated in great power conflict: as of 2018, Japan has retained the third best economy in the world.⁴⁸

Requirements 2009-2019

GFM REQUIREMENTS

See Classified Addendum

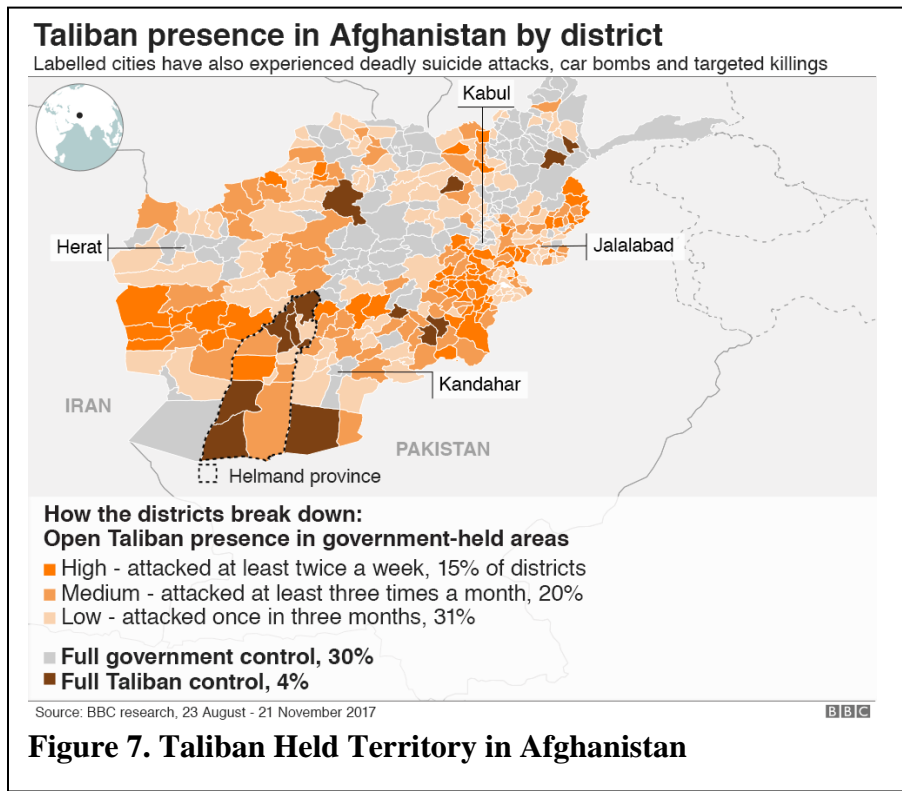
Analysis. The significant decrease in the personnel deployed to the Middle East is a representation of



U.S. policy and a desire to lessen personnel involvement in prolonged military conflicts. But did any recent OCO achieve the desired state prior to U.S. drawdown? There are still military personnel deployed to Afghanistan and Iraq, although their principle role has changed to that of Security Force Assistance. However, in

sharp contrast to the initial stages of Iraq or Afghanistan, the burden of security now falls upon the host nation far more than the U.S. And in at least the Marine Corps' case, because very few U.S. personnel depart friendly lines, the host nation's security force is subject to harsh conditions and must contend with insurgents or Violent Extremist Organizations (VEO) without partnered support for the ground combat element. Therefore, was stability achieved? The Islamic State quickly rose and secured at times more than 30,000 square miles of Iraq and Syria (Figure 5) between 2014 and 2016, securing more than 30,000 slaves and displacing a reported one million Iraqis. It is very possible that the drawdown of U.S. forces was premature.

Revisit Afghanistan, where U.S. military personnel have steadily decreased from the 2009 surge to their present levels. Although the total number of Afghan Security Forces has totaled more than 28,000 since 2015, there remains Taliban-held territory as depicted in Figure 6. If those metrics are insufficient, then it is critical to remember that the U.S. is again considering peace talks with the Taliban that exclude the Government of the Islamic Republic of Afghanistan (GIROA). There is not a clearer representation of instability in a state than when an organization—in this case GIROA—is sidelined during conflict-resolution so that the beneficiary



coalition that installed them—the U.S.— can discuss terms with the adversary—the Taliban. It seems that the U.S. has neither established nor set the conditions to maintain stability in either state prior to a significant reduction of U.S. military capability, leading to a situation where neither country can contain or deter emerging threats. If we revisit the historical analysis, there are examples where the

insufficient application of military force resulted in future conditions that failed to achieve the desired effect. It would be unfair to say that the use of only persistent forces instead of rotational ones would have resulted in a completely different outcome. However, it is valid to assert that the employment of a capable persistent force with the support of the whole of government has historically proven to yield results that more strongly resemble, if not wholly achieve, stability for long periods.⁴⁹

Conclusion

The use of military forces to establish long-term order is not a default action. It is a tool that applies to some circumstances and does not apply to others. Although this research purely looks at military action and strategy in a condensed fashion for the purpose of context, there are numerous other factors in each case scenario that facilitated the creation and maintenance of stability. The use of either rotational or persistent forces was just a means. Each methodology should in no way typecast the military into a support-police action role. As demonstrated by these examples, persistent and rotational forces can strongly contribute to the sound application of statecraft to solve large or small problems for the nation's interests. This suggests that the use of persistent forces as a facet of national strategy can be very successful. The two best examples are post- WWII Germany and Japan. The application of short-term persistent forces facilitated the achievement of national objectives and assisted in the rebuilding of states devastated by great power conflict. Because of the use of persistent forces, these states, in the span of a generation, became thriving and strong members of the international order. That point is critical to the employment of persistent forces in a national strategy. The institution of the military is not for nation building, although it can assist with that in numerous areas. In both Germany and Japan's cases, the use of military forces achieved a desired state because it was part of a government and international effort that was planned in detail. In addition, most conflict-resolution involves expertise outside of military leaders. An appointed civilian representative from the Department of State will oversee management of a GDP, banks, infrastructure development, the establishment of governance, etc.

Specifically, in Japan, however, U.S. military leadership commanded civilian input and exclusively oversaw the transition. Therefore, Japan serves as proof that conflict-resolution under the ultimate authority of the military but with civilian assistance and adequate preparation, can be successful.

Each of these case studies describes how military forces achieved a national objective. Furthermore, with each example of the use of rotational forces to satisfy those objectives, it was necessary for military forces to redeploy not just to the same region, but also to the same state to achieve long-term stability. When reviewing these case studies, there are many examples that demonstrate that the use of a substantial persistent force with adequate capability would have likely prevented the U.S. from committing additional forces, thereby ensuring the added benefit of long-term stability, if not peace. This premise can survive the test of time as well. Take into consideration the events from the Banana Wars: Nicaragua, Haiti, the Dominican Republic, and the Philippines all demonstrate that the careful and precise use of military force in either a rotational or persistent manner or both, can achieve a desired state. The evidence suggests, in these cases, that the uses of persistent forces are more prone to achieve the goal of stability.

The additional benefits of persistent forces in comparison to rotational are somewhat intrinsic: relations with host nation or local populace leaders, prevailing knowledge of the area compounded over time, and less cost. However, the investment is more significant, particularly in regard to the support by the American public. In order to ensure that military interventions are successful, actions should be closely tied to a significant benefit to the U.S. The military interventions of the 1900s, at times executed with flawed foreign policy objectives, did have clearly defined aspirations. The Monroe Doctrine, Dollar Diplomacy, and the Roosevelt Corollary are all examples of the U.S.'s attempt to promote international stability. Regardless of what element of statecraft the U.S. uses to maintain those interests, policy and military strategy must clearly outline long-term and short-term objectives in the employment of those rotational or persistent forces.

This study does not attempt to answer whether the use of persistent or rotational forces is a band-aid to international or national security issues. In most instances, the use of persistent forces to achieve or support U.S.

interests in a non-American territory will either be characterized or considered the same as an occupation. One might also wonder, why does the U.S. occupy some nations and support governance in others? A short study cannot answer that question because it requires additional analytics and metrics regarding financial costs, resources to include American servicemen, the will of the people, and the priority of international and domestic issues. Even the status of the U.S. is contentious. Can persistent forces effectively achieve long-term stability if the U.S. is not a hyperpower? A superpower? A great power? A middle power? The answer is fluid. What is relevant today may be different one hundred years from now. How then do we prescribe to a method? There are two critical components for consideration when applying military force: prioritization and maintenance of international standing. Prioritization allocates the most resources to the largest problem. What is the largest problem? That is a matter of context and easily the subject of expert debate. The most common answer depends on what will be the biggest challenge to national security at that time. In some periods, that may be an encroachment on American sovereignty; in other instances, it may be compliance with a mutual defense treaty; or the support of a partner/ally when a third party threatens their sovereignty. Ultimately, America will not have a desire to see its current standing in the international order diminished, thereby placing that as their highest priority. Thus, when considering the design of strategy or policy, whether it be in great power conflict, in support of maintenance of the international order, or prevention of the oppression of freedom through terror, America must ultimately determine whether the use of military force in any manner will facilitate and maintain its interests and its standing in the long term. There may be instances when those needs are reprioritized, but for the foreseeable future the norm will remain 'America First'.

A nation concerned with retaining a significant amount of influence, which America currently possesses, will rarely commit the full might of the state or even its military to conflict for an extended period of time. The rare exception to this notion is if great power conflict or total war threatens America's survival, which will cause the mobilization of the military as well as the populace. Gaining the support of millions of Americans to preserve and improve the way of life of a foreign state, which is the requirement to sustaining a protracted

military commitment in another nation, has proven to be difficult in America's history. Americans' reluctance is why utilization of rotational forces takes place, despite history showing that persistent ones would be better suited to the task. The remedy to this issue is clarity in requirements from military planners. The acceptance of utilizing persistent forces to achieve stability should be rooted in doctrine. Whereas current doctrine compiles significant data from small wars or counterinsurgency campaigns, it only discusses how to implement stability. It does not take into account the campaign design that plans for extended foreign commitments. This should be a field of study for members of the Departments of State and Defense. Recount the successful post-war transition of Japan: General MacArthur and SCAP demonstrated that the military had the ability to not only diplomatically coordinate with the USSR, U.K., and China—all of whom had a vested interest in Japan—but also was able to use civilian expertise under his command to implement a cohesive plan for conflict-resolution.

Japan was, arguably, the best post-war transition of an occupied nation-state in U.S. history—one where the military took the lead in design, which resulted in long-term stability. To facilitate this end today, contemporary government education on, what will be termed Strategic Stability Planning for the purpose of this essay, should reflect an accurate portrayal of military history—successes and failures—so that the nation remembers which conflicts were/were not successful and the reasons why. Additionally, there should be instruction on stability actions and functions, currently detailed in JP 3-07, to ensure common understanding. Finally, there should be an inclusion on how to execute governance and design of public policy. Currently, the military and select Department of State officers only receive instruction on how to provide *support to* governance. The difference in focus upon entrance of U.S. forces into an already-considered failing state, or entrance into a state for the purpose of regime change, will be on those who are in a position to design Strategic Stability to determine appropriate metrics for governance of a new host nation. Thus, it is only when citizens, servicemen, and leaders possess a deep understanding of historical causes and resolutions, as well as instruction for U.S. forces on stability actions and functions, and the execution on governance and design of public policy,

will the country be ready to create a comprehensive policy and strategy that will prepare them for the next prolonged military commitment.

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