

| REPORT DOCUMENTATION PAGE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                    |                                                                  |                                             |                                          | Form Approved<br>OMB No. 0704-0188                                                |  |
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| <b>1. REPORT DATE (DD-MM-YYYY)</b><br>27-03-2020                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                    | <b>2. REPORT TYPE</b><br>Master of Military Studies (MMS) thesis |                                             |                                          | <b>3. DATES COVERED (From - To)</b><br>AY 2019-2020                               |  |
| <b>4. TITLE AND SUBTITLE</b><br>Strengthening The Marine Corps Reserve                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                    |                                                                  |                                             | <b>5a. CONTRACT NUMBER</b><br>N/A        |                                                                                   |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                    |                                                                  |                                             | <b>5b. GRANT NUMBER</b><br>N/A           |                                                                                   |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                    |                                                                  |                                             | <b>5c. PROGRAM ELEMENT NUMBER</b><br>N/A |                                                                                   |  |
| <b>6. AUTHOR(S)</b><br>Blaul, James J. (Major)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                    |                                                                  |                                             | <b>5d. PROJECT NUMBER</b><br>N/A         |                                                                                   |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                    |                                                                  |                                             | <b>5e. TASK NUMBER</b><br>N/A            |                                                                                   |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                    |                                                                  |                                             | <b>5f. WORK UNIT NUMBER</b><br>N/A       |                                                                                   |  |
| <b>7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES)</b><br>USMC Command and Staff College<br>Marine Corps University<br>2076 South Street<br>Quantico, VA 22134-5068                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                    |                                                                  |                                             |                                          | <b>8. PERFORMING ORGANIZATION REPORT NUMBER</b><br>N/A                            |  |
| <b>9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES)</b><br>N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                    |                                                                  |                                             |                                          | <b>10. SPONSOR/MONITOR'S ACRONYM(S)</b>                                           |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                    |                                                                  |                                             |                                          | <b>11. SPONSOR/MONITOR'S REPORT NUMBER(S)</b><br>N/A                              |  |
| <b>12. DISTRIBUTION/AVAILABILITY STATEMENT</b><br>Approved for public release, distribution unlimited.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                    |                                                                  |                                             |                                          |                                                                                   |  |
| <b>13. SUPPLEMENTARY NOTES</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                    |                                                                  |                                             |                                          |                                                                                   |  |
| <b>14. ABSTRACT</b><br><p>During the first 84 years of existence, 1916 - 2000, the United States Marine Corps Reserve was employed as a strategic reserve that was only called upon to mobilize when active duty Marine Corps forces needed the assistance of additional personnel to maintain combat operations. However, since 9/11 and the years of conflict in the Middle-East and abroad, the United States Marine Corps Reserve has been employed as an operational reserve. This new employment model has created a "new normal" within the reserve community for almost an entire generation of Marines and Sailors unlike the historical employment of the force. From doctrinal definitions to fiscal cost analyses, there is overwhelming proof that an operational reserve is not sustainable for long-term employment. With the potential for future fiscal austerity and uncertainty with continuous congressional Continuing Resolutions to fund the Department of Defense, senior leaders must decide if the fiscal cost to employ the USMCR as an operational reserve is worth the additional fund requirements. Since the overall cost to activate reserve Marines is 132% more than a commensurate active duty capability, reverting to a strategic reserve construct will assist in additional fiscal cost saving measures that could be applied elsewhere.</p> |                    |                                                                  |                                             |                                          |                                                                                   |  |
| <b>15. SUBJECT TERMS</b><br>Reserves, Operational Reserve, Strategic Reserve, Marine Reservist                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                    |                                                                  |                                             |                                          |                                                                                   |  |
| <b>16. SECURITY CLASSIFICATION OF:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                    |                                                                  | <b>17. LIMITATION OF ABSTRACT</b><br><br>UU | <b>18. NUMBER OF PAGES</b><br><br>41     | <b>19a. NAME OF RESPONSIBLE PERSON</b><br>USMC Command and Staff College          |  |
| <b>a. REPORT</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <b>b. ABSTRACT</b> | <b>c. THIS PAGE</b>                                              |                                             |                                          | <b>19b. TELEPHONE NUMBER (Include area code)</b><br>(703) 784-3330 (Admin Office) |  |
| Unclass                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Unclass            | Unclass                                                          |                                             |                                          |                                                                                   |  |

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MASTER OF MILITARY STUDIES

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**STRENGTHENING THE MARINE CORPS RESERVE**

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

**Major James J. Blaul**

AY 2019-2020

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Date: 27 March 2020

## **Executive Summary**

**Title:** Strengthening the Marine Corps Reserve

**Author:** Major James J. Blaul, United States Marine Corps

**Thesis:** While the Marine Corps Reserve has been successful in fulfilling its temporary operational reserve mission, returning to its doctrinal strategic reserve mission is necessary to sustain the force for long-term viability to avert negative consequences.

**Discussion:** Augmenting and supporting the active component is the quintessential purpose of the USMCR. During the first 84 years of existence, 1916 - 2000, the United States Marine Corps Reserve was employed as a strategic reserve that was only called upon to mobilize when active duty Marine Corps forces needed the assistance of additional personnel to maintain combat operations. However, since 9/11 and the years of conflict in the Middle-East and abroad, the United States Marine Corps Reserve has been employed as an operational reserve. This new employment model has created a “new normal” within the reserve community for almost an entire generation of Marines and Sailors unlike the historical employment of the force. From doctrinal definitions to fiscal cost analyses, there is overwhelming proof that an operational reserve is not sustainable for long-term employment. With the potential for future fiscal austerity and uncertainty with continuous congressional Continuing Resolutions to fund the Department of Defense, senior leaders must decide if the fiscal cost to employ the USMCR as an operational reserve is worth the additional fund requirements. Since the overall cost to activate reserve Marines is 132% more than a commensurate active duty capability, reverting to a strategic reserve construct will assist in additional fiscal cost saving measures that could be applied elsewhere.

**Conclusion:** In the post 9/11 military, the USMCR transitioned from a strategic reserve to an operational reserve to augment the active component while conducting large scale military/combat operations in two separate theaters in the Middle-East. At the onset of the Global War on Terrorism, military planners at the highest levels knew the all-volunteer force would potentially be stressed during the pending wars against terrorism. The wars in Iraq and Afghanistan is what spurred the transition from a strategic to operational reserve because of the anticipated over-extension of the active component forces. The Marine Corps Reserve will always be ready to fight for the United States, but as the entire Marine Corps transitions from the past two decades of fighting wars in the Middle East, so too should the Marine Corps Reserve component. While the Marine Corps Reserve has been successful in fulfilling its temporary operational reserve mission, reverting to its doctrinal strategic reserve mission is necessary to sustain the force for long-term viability in the decades to come.

## DISCLAIMER

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## *Illustrations*

|                                                                | Page |
|----------------------------------------------------------------|------|
| Figure 1: Marine Forces Reserve End Strength, April 2014.....  | 11   |
| Figure 2: SMCR Unit Strength 2001-2009.....                    | 15   |
| Figure 3: Cost Analysis Case Study to Mobilize Reservists..... | 17   |
| Figure 4: Authorities to Mobilize Reserve Forces.....          | 18   |
| Figure 5: USMCR Activations 2001-2009.....                     | 19   |

## *Table of Contents*

|                                        | Page |
|----------------------------------------|------|
| EXECUTIVE SUMMARY.....                 | ii   |
| DISCLAIMER .....                       | iii  |
| LIST OF ILLUSTRATIONS .....            | iv   |
| PREFACE .....                          | vi   |
| BODY                                   |      |
| Introduction.....                      | 1    |
| Background.....                        | 2    |
| Mission and Doctrinal Definitions..... | 3    |
| Historical Framework.....              | 6    |
| DOD Authorities.....                   | 8    |
| Statistical Case Studies.....          | 9    |
| Fiscal Analysis.....                   | 16   |
| CMC Guidance.....                      | 19   |
| RECOMMENDATIONS.....                   | 22   |
| CONCLUSION.....                        | 24   |
| ENDNOTES .....                         | 25   |
| BIBLIOGRAPHY .....                     | 29   |

## ***Preface***

The Marine Corps Reserve will always be an indispensable resource that has positively impacted my career on many levels. From being a young enlisted Reservist and rising through the enlisted ranks, to eventually serving as an Inspector-Instructor of a reserve unit. I firmly believe in the validity of the Reserve component and I am very passionate about how it is utilized. For these reasons, I chose to write this paper on the Marine Corps Reserves and how to make it better.

I would like to thank Doctor Bradford A. Wineman for all of his guidance, expertise, and assistance throughout the course of this research and study. I also need to thank all Marines and Sailors, active and reserve, who have positively impacted my career. Lastly, I want to thank my family for supporting me throughout this endeavor.

## **Introduction**

The United States Marine Corps Reserve (USMCR) has been an integral capability for the United States military for over the past century. Marine Reservists have been mobilized and supported combat operations in every major war since its creation in 1916.<sup>1</sup> It is widely known throughout the military community and the Marine Corps that every major war will most likely include the reserves and that they must strive to maintain high readiness standards in the event they are to be called upon to defend the United States. Augmenting and supporting the active component is the quintessential purpose of the USMCR. During the first 84 years of existence, 1916 - 2000, the United States Marine Corps Reserve was employed as a strategic reserve that was only called upon to mobilize when active duty Marine Corps forces needed the assistance of additional personnel to maintain combat operations. However, since 9/11 and the years of conflict in the Middle-East and abroad, the United States Marine Corps Reserve has been employed as an operational reserve. This new employment model has created a “new normal” within the reserve community for almost an entire generation of Marines and Sailors unlike the historical employment of the force. From doctrinal definitions to fiscal cost analyses, there is overwhelming proof that an operational reserve is not sustainable for long-term employment. Additionally, the Commandant’s direction for the Reserve component and historical case studies of activating units will demonstrate that the United States Marine Corps Reserve needs to revert back to a strategic reserve to avert potential issues in the future for long-term sustainability. The impact of an operational vs strategic reserve discussed in this paper will highlight alternative solutions to maintain and sustain a force multiplying reserve that can be called upon in the event of large scale conflict. While the Marine Corps Reserve has been successful in fulfilling its



temporary operational reserve mission, returning to its doctrinal strategic reserve mission is necessary to sustain the force for long-term viability to avert negative consequences.

## **Background**

Serving in the Reserves differentiates from the rest of the military and the Marine Corps because of the cultural, social, and philosophical underpinnings of choosing that type of career but the institutional employment of an operational reserve is beginning to “blur the lines” of the advertised reserve program. Marine Forces Reserve (MarForRes) promotes a culture of maintaining Marines who want to serve their country but also want to serve their community as well. A member of the reserve community means that their civilian job is their main source of income and being a Marine Reservist is their secondary income or part-time job that is executed once a month and two weeks a year. MarForRes understands the sense of pride and patriotism the Marine Reservists maintain but the institution knows that the active duty lifestyle with the potential to be deployed at any moment is not for all Marines. This also includes having to move their family away from their home and continually move every few years at the Marine Corps’ discretion. Marine Reservists have the same standards as active duty Marines but the only difference is that reservists drill one weekend a month and conduct their two week annual training per year. While the standards are the same, the societal differences is what makes the reserves unique. The majority of the social and cultural dynamics of MarForRes are the same as the active component but the conduct of when and where the training occurs makes the reserves unique.

Over the past two decades of the United States Marine Corps Reserve being employed as an operational reserve, more Marines are being activated to augment the active component.

Thousands of Marines have been mobilized every year to support the active component in deployments throughout the world, but the service needs to ascertain if that is the correct employment method for the Reserves. The Marine Corps Reserve used to only be activated during large scale conflict, but over the two decades it has not stopped, even after the major combat operations ceased to exist. The former societal norms of being a Marine Reservist are almost an aspect of the past or overlooked due to the operational reserve employment model being directed by the senior leaders of the institution.

In the post 9/11 military, the USMCR transitioned from a strategic reserve to an operational reserve to augment the active component while conducting large scale military/combat operations in two separate theaters in the Middle-East. At the onset of the Global War on Terrorism, military planners at the highest levels knew the all-volunteer force would potentially be stressed during the pending wars against terrorism. The wars in Iraq and Afghanistan is what spurred the transition from a strategic to operational reserve because of the anticipated over-extension of the active component forces.<sup>2</sup> This led to the Marine Corps to activate thousands of Marines from the IRR to deploy to the Middle East.<sup>3</sup> The new employment model for the reserve forces was born from the concept of extended conflict and an unknown end in sight and the last time the United States fought in two separate theaters of conflict was during World War Two.<sup>4</sup> While the concept of an operational reserve was deemed “unplanned” by congress, it was also viewed as a “necessity.”<sup>5</sup> However, Congress has not weighed-in on the employment of the operational reserve since then and it might be a good time to do so.

### **Mission and Doctrinal Definitions**

Before the Global War on Terrorism began in 2001, the Marine Corps Reserve was treated and employed as a doctrinal reserve. Marine Corps Doctrinal Publication 1-0 (MCDP 1-0), Marine Corps Operations, defines reserve as “1. Portion of a body of troops that is kept to the rear, or withheld from action at the beginning of an engagement, in order to be available for a decisive movement. 2. Members of the military services who are not in active service but who are subject to call to active duty.”<sup>6</sup> As defined by doctrine, the reserve should only be activated or utilized in the event for a decisive movement. When a commander commits his/her reserve, this serves as the last bid for success with limited options remaining to exploit. Additionally, Dr George Friedman of the Reserve Officer’s Association, in the National Security report of 2008 stated: “When the reserve is committed, the commander’s options contract. If he faces a sudden threat or opportunity, he has no resources with which to counter or exploit it. The doctrine of never fully committing one’s reserve is central to good military practice.”<sup>7</sup> Department of Defense doctrine and historical employment of the USMCR demonstrates a chronological series of successful case studies that show the USMC Reserves has been a strategic reserve for over 80 years and performed well during that time. This was exemplified in 1989 by the Assistant Secretary of Defense for Reserve Affairs: “Most important, the reservists and guardsmen of 1989 were better trained, better equipped, better paid, and perhaps even more motivated than they had been 10 years earlier.”<sup>8</sup> This further illustrates that when the United States Marine Corps Reserve is treated and employed as a doctrinal Reserve, this provides the Commander in Chief more options and employment flexibility.

Since 2001, the Marine Corps Reserve has been employed as an operational reserve, not a strategic reserve. The current mission of the Marine Corps Reserve, as stated by the Marine Forces Reserve Commanding General is “Commander, Marine Forces Reserve

(COMMARFORRES) commands and controls assigned forces for the purpose of augmenting and reinforcing the Active Component with trained units and individual Marines as a sustainable and ready operational reserve in order to augment and reinforce active forces for employment across the full spectrum of crisis and global engagement.”<sup>9</sup> While analyzing the current mission statement with the aforementioned doctrinal definition of a reserve, they are similar but with significant details that differentiate the employment. The current mission statement of the Marine Corps Reserve implies that its forces will be utilized for employment to augment the active component across the range of military operations throughout the globe. Additionally, the Marine Corps Reserve has service specific capabilities that are only found in the Reserves, but that is not listed in the overall mission statement of the Marine Corps Reserves. With the various differences between doctrinal definitions and the current mission of the Reserves, fidelity and continuity needs to be directed for proper utilization and sustainability of the force for future employment.

The term “reserve” is defined, the Marine Corps Reserve has a defined mission, but the term “Operational Reserve” is not a doctrinally defined term per the Reserve Forces Policy Board as of 09 Nov 2019.<sup>10</sup> In the memo from the Reserve Forces Policy Board to the Deputy Secretary of Defense, it outlines a recommended definition of “Operational Reserve” because “the reserve component remains hindered by Cold War statutes and policies geared for strategic employment and employment of the reserve component has transformed to an operational model.”<sup>11</sup> The proposed definition from the Reserve Forces Policy Board is:

An Operational Reserve provides both ready operational capabilities and on-call strategic depth to provide the full spectrum of lethality in support of United States defense requirements. In their operational ready roles, reserve components provide responsive capacity that is accessible, routinely utilized, and fully integrated with the active force to

help meet ongoing and emergent Combatant Commander requirements. The reserve components also provide the nation strategic depth, permitting the active forces to expand substantially to meet the needs of a large-scale mobilization in response to a major power conflict or other national emergency.<sup>12</sup>

The proposed definition for the joint force provides clarity, however, it has not been approved to date. The definition is vague enough that it can be interpreted for employment in many different forms and fashions. Additionally, the proposed definition does not give further information, nor does any ancillary documentation identify to what extent Reserve forces will be utilized in order to maintain compliance with congressional law. Whether or not the proposed definition is approved by the Secretary of Defense, it may not come anytime soon because the Reserve Forces Policy Board has been formally requesting in writing since 2013 for approval of the proposed definition.<sup>13</sup> Lastly, if the Secretary of Defense wants to solidify an operational reserve, it needs to be defined in order to dispel confusion, misinterpretations, and provide clarity to the joint force.

## **Historical Framework**

The historical significance and employment of the Marine Corps Reserve reinforces the prospect of the future success of the force as a strategic reserve. The Marine Corps Reserve was established in 1916 by the 64th Congress in the Naval Appropriations Act of 1916 in recognition of the United States' entry into the World War in Europe.<sup>14</sup> After the First World War, and throughout the next hundred years, the Reserve Marines would become an indispensable capability in every major conflict the United States participated in. Tens of thousands of Marine Reservists would mobilize during World War Two, the Korean War, and Operation Desert Shield/Desert Storm.<sup>15</sup> Interestingly enough, due to the draft during the Vietnam War, there were no major USMCR activations or mobilizations due to the overwhelming number of

personnel entering the service due to the draft.<sup>16</sup> While Marine Reservists could volunteer for deployments or individual augmentees, Reserve activations were minimal during the Vietnam conflict.<sup>17</sup>

While the Marine Corps Reserve was not mobilized during the Vietnam War, the 1950s through the 1960s saw some of the largest USMCR institutional changes until the 21st Century, with regards to overall employment of reserve forces. After the Korean War, mandatory institutional/organization reforms were directed regarding training, obligatory service, and overall organization of forces.<sup>18</sup> The mandatory institutional changes were directed because of problems that were discovered when Marine Reserve forces were mobilized in support of the Korean War. Many of the reforms were directly related to improve the mobilization efforts in the future. This included a mandatory six months of initial training because many Marines who deployed to Korea had not attended any formal training and the popular ‘one weekend a month and two weeks a year’ of work came about in 1958, and the formation of major subordinate commands within Marine Forces Reserve were established in 1962.<sup>19</sup> This provided the establishment of Fourth Marine Division and Fourth Marine Air Wing.<sup>20</sup> This structure was created in order to establish a complementary reserve capability that could be rapidly mobilized and not have to be recreated each time a contingency crisis arose that required reserve support. Additionally, mandatory conscription became highly controversial during the Vietnam War in the 1960s.<sup>21</sup> During this time, many studies were conducted to determine if the United States was capable of maintaining a military without conscripted service via the draft.<sup>22</sup> President Richard Nixon signed the new law in 1971 that formally ended the draft.<sup>23</sup> Further, the shift to the all-volunteer force impacted the Army more than the Marine Corps. While the Marine Corps Reserve retention rates remain relatively stable, the Army’s retention rates dropped over 110,000

soldiers between the years of 1974-1978 with a steady increase over the following five years until 1983.<sup>24</sup> It is known that the military was in a drawdown during the 1970s, but the aforementioned statistic is from personnel not wanting to reenlist. These major institutional and organizational changes revolutionized the military and the Marine Corps Reserve while providing the modern structure of major subordinate commands and the conduct of reserve employment today.

The modern framework that was developed in the 1950s and 1960s and the strategic reserve employment construct was successfully utilized during the 1990-1991 Persian Gulf conflict. During Desert Shield/Desert Storm, 15,000 Marine Reservists were mobilized to form a Division (-) that comprised of infantry, tanks, artillery, reconnaissance, light armored infantry, combat engineers, civil affairs, a truck company, military police, and an assault amphibian company that was spread throughout the active component forces.<sup>25</sup> During the beginning of the crisis, it is reported that over 11,000 Marine Reservists had volunteered to deploy before the Presidential call-up was issued.<sup>26</sup> Further, the reserve forces that deployed were considered a success during the conflict because they performed at a commensurate manner as the active component.<sup>27</sup> After being mobilized for only a year, all Marine Reservists returned home with no further active duty service.<sup>28</sup> This case study regarding the Persian Gulf conflict illustrates the successes and proper employment of the Marine Corps reserves as a strategic reserve.

### **DOD Authorities**

Further, DOD Directive 1200.17 is what directed the new “operational guard and reserve” for the entire military, not just the Marine Corps.<sup>29</sup> Additionally, the wording in the DOD Directive is quite unique in that it provides further clarification and information regarding

what the original intention of an operational reserve should be. In the DOD Directive, it states: “The RCs provide operational capabilities and strategic depth to meet U.S. defense requirements across the full spectrum of conflict including under sections 12301, 12302, 12304, and 12306 of Reference (a).”<sup>30</sup> (Reference (a) in the previous sentence refers to Title X) This directive from the Department of Defense gave the joint active components, across the branches of service, unfettered access to utilize the Joint Reserve Force without hesitation. While the DOD Directive changed the employment paradigm, USMC Reserve members are still bound by congressional law in TITLE 10 USC, Section 12304B to limit activations to no more than 365 consecutive active duty days and no more than 1:5 year activation to dwell timeframe without the Secretary of Defense’s authorization.<sup>31</sup> This further illustrates that the reserve component is no longer being utilized as a doctrinal reserve and potentially limiting commanders and service leaders with limited options if employed as an operational reserve. While the shift from a strategic to operational reserve was temporarily necessary, military and civilian leaders of the joint reserve force needs to revert back to a strategic reserve in order to sustain its readiness to augment the active component during times of large scale conflict.

### **Statistical Case Studies**

The overall deployment cycles of the United States Marine Corps Reserve have changed significantly and the statistical analysis of the use of reserve forces have resulted in the reserve component being employed similarly to the active component forces. In the pre-9/11 military, the most recent activation of any reserve force was during the 1990 Desert Shield/Desert Storm conflict where Marine Corps reserve forces were activated for less than a year.<sup>32</sup> At this time in history, reserve forces were employed as a strategic reserve and only utilized if the active



component forces needed augmentation during large scale operations in support of the National Defense Strategy. However, once the Marine Reservists were deactivated and sent home, they were not called upon until the Global War on Terrorism.<sup>33</sup> By 2001-2004 timeframe, over 50% of the USMCR had conducted an activation in support of the wars in the Middle East and with over 10,000 reserve Marines mobilized at any given time from 2001-2004.<sup>34</sup> The overall use of the Marine Corps reserves has declined since the end of Operation Iraqi Freedom and Operation Enduring freedom but the statistics are striking. In 2018, the Commanding General of Marine Forces Reserve, Lieutenant General Rex McMillian, testified before the House Armed Services Sub-Committee and provided the following update: “Marine Forces Reserve will support the combatant commanders by mobilizing in excess of 2,500 Reservists and providing almost 12,000 Marines for a multitude of theater-specific exercises and security cooperation events.”<sup>35</sup> Since the current end strength of the drilling Selected Marine Corps Reserve is approximately 38,500 that means over 37% of the USMCR was utilized that year. The consequences of a long-term employment model of an operational reserve will require further study for validity.

The Marine Corps Reserve is one of the largest commands in the Marine Corps, but in reality, the reserve population constitutes multiple types of service members and contractual obligations. The drilling reserve population comprises only 30% total personnel.<sup>36</sup> IRR personnel comprise the largest demographic but they are never seen by anyone in the USMCR. As shown in Figure 1, over 67,000 Marines or 52% of the reserve population that are in the individual ready reserve (IRR).<sup>37</sup> The IRR is where Marines have finished their contract, have obtained their DD-214 (end of active service paperwork), and are not required to perform any duties related to the Marine Corps unless called upon in the event of a national emergency. The

IRR could be a potential personnel source in the event of a catastrophic national emergency due to having an all-volunteer force and the disbandment of the draft.

Figure 1.

| Marine Corps Reserve End Strength 104,307   |       |       |        |
|---------------------------------------------|-------|-------|--------|
| SMCR                                        | AR    | IMA   | IRR    |
| 31,552                                      | 2,222 | 2,892 | 67,641 |
| *Numbers are approximation as of April 2014 |       |       |        |

38

The overall use of the reserve components, across the joint force, has had considerable attention because of the potential over-use with regards to deployments that stems from the operational reserve employment construct. The potential over-use of the joint reserve force created so much attention that in 2007 the United States Congress established a task-force to investigate the deployment rates and potential impacts to the Department of Defense. The Defense Science Board conducted the review, and noted that “they were impressed with the overall performance of the reserves but the strain needs to eventually be relieved.”<sup>39</sup> The report went on to further clarify that the reserve forces would eventually not be able to support the demands for forces with the “DOD's policy mandating dwell times of one year deployed and two years not deployed (1:2) for the active force and one year mobilized and five years not mobilized (1:5) for the reserve components.”<sup>40</sup> While the Defense Science Board conducted this study for the entire Department of Defense, it was mainly aimed at the United States Army because it is the largest Reserve force but the findings reflected in the realities of the Marine Corps. Additionally, the report was dated in 2007 and covered reserve deployments from 2001-2007.<sup>41</sup>

Further, the report showed that the highest number of reserve personnel mobilized was during the summer of 2003 with a total of 213,000 reserves on active duty and roughly half of the overall reserve population across the joint force mobilizing during the entire reports analysis.<sup>42</sup> While the reserve component can be a viable personnel resource pool that can augment the active component forces, the Army National Guard also has a separate domestic mission that cannot be forgotten about. While the domestic mission pertains strictly to the United States Army National Guard, the overall readiness of the units were abysmal. During the time of this report, over 88% of all Army National Guard units were “reporting ‘not operationally ready’ due to equipment shortfalls” because of equipment being deployed, overuse, or lack of personnel management to maintain the equipment.<sup>43</sup> It can only be reasonably inferred that the Marine Corps had similar issues. The issues depicted could be a direct consequence to the United States Army’s “Abram’s Doctrine” where over 60% of the entire Army’s combat support units are in the Reserves.<sup>44</sup> The “Abrams’ Doctrine” was created after the Vietnam War in order to ensure that Army Reserve units were activated at a lower margin-scale of conflict, to garner public support, and to ensure the Army Reserve component was not left out of another war.<sup>45</sup> Given the report’s findings that the reserves could not eventually sustain/support the deployment cycle mandates and the abysmal equipment readiness of units, it is ironic that the Department of Defense decided to direct the “operational reserve” the following year in Department of Defense Directive 1200.17.

In any branch of service, it can be argued that the retention rates of personnel is a good tool in determining if an operational reserve employment construct is favorable or unfavorable from the personnel point of view. In a study conducted in the early days of the Global War on Terrorism, the First-Term Alignment Program (FTAP) was analyzed to consider the overall attrition rates of Marine Corps Reservists in the pre and post 9/11 era. The figures, from a purely

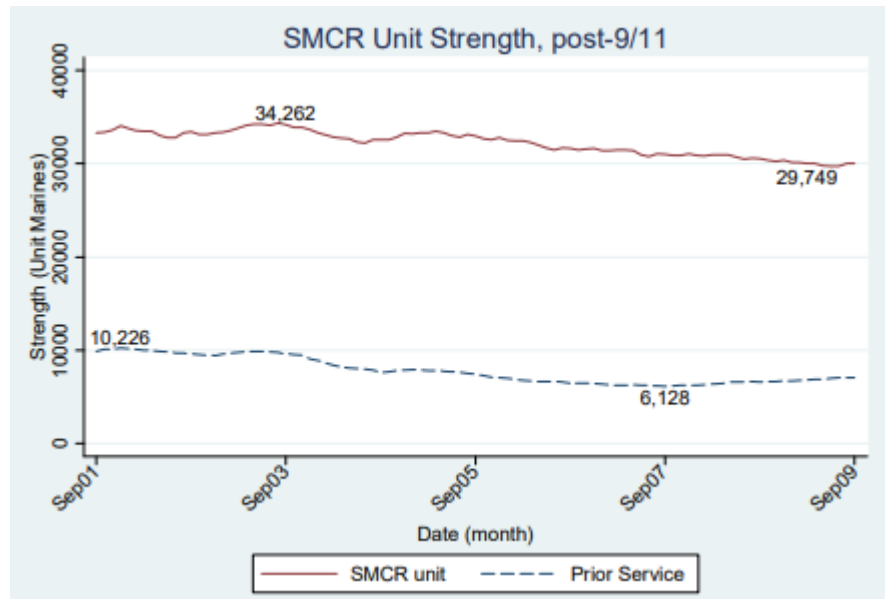
quantitative analysis showed that there was approximately 5%-6% less attrition in the post-9/11 era in comparison to the pre-9/11 era.<sup>46</sup> In more detail, in the pre-9/11 era, there was approximately a 36% attrition rate for first term Marines versus approximately a 30% attrition rate in the post 9/11 era.<sup>47</sup> The report continued to directly correlate the 5%-6% reduction of attrition to the probability of deployments to either Iraq, Afghanistan, or a hostile fire pay zone.<sup>48</sup> While the operational reserve employment model shows that it increases the retention rates of personnel, senior leaders will need to determine if the use of personnel in this conduct is sustainable from a medical and personnel readiness stand-point.

Similarly, in a separate report conducted, subsequent term alignment program (STAP) reenlistments were also analyzed during the post 9/11 era of enlisted personnel and officers. In this report, the analysis showed that personnel are more likely to reenlist when they have deployed at least once throughout their career.<sup>49</sup> However, in the same report, it also reported the overall end strength of the drilling reservist population. In these statistics, it showed that the end strength and the authorized end strength remained relatively the same from 2001-2003, then it spiked to approximately 41,000 Marines.<sup>50</sup> This can directly be attributed to the surge in personnel during the Iraq war. Conversely, while the authorized end strength remained the same, the actual end strength began to lower to approximately 38,500 in 2007, 37,500 in 2008, and a continual yearly climb back to a commensurate amount relative to the authorized end strength for the duration of the quantitative analysis.<sup>51</sup> This means that there was a 10% reduction to the actual personnel available to mobilize in support of the Global War on Terrorism. The lowered actual end strength around the 2008 timeframe can be directly correlated to the finality of the normal reserve contract of 6x2 (six years drilling and two years in the Individual Ready Reserve). This also directly corresponds to the majority of personnel signing contracts near the

2001-2003 timeframe with the contract expiring in 2007-2009. When analyzing the figures and statistics of the retention rates of personnel during the post 9/11 era, the figures can look favorable for an operational reserve and in other aspects, they do not. While in certain scenarios, the attrition rates seem to be negligible when reported as 5%-6%, but when it is viewed at the entire end strength, a 10% drop is significant for an available total reserve force. Senior leaders will need to determine how important retention rates are for long-term sustainability if the operational reserve construct is fully implemented for the future.

The overall use of Marine Forces Reserve as an operational reserve could have long-standing affects to readiness and retention of personnel if the Marine Corps does not revert to a strategic reserve employment construct with fewer activations/mobilizations. The first point of consideration must be the overall retention and staffing of the Marine Corps Reserve. In a statistical analysis of reserve personnel from 2001-2009 (Figure 2), the overall amount of Marines participating in the reserves fell from 34,262 to 29,749.<sup>52</sup> Additionally, the amount of prior-service Reserve Marines fell from 10,226 to 6,128.<sup>53</sup> This means that Marine Forces Reserve lost 13.1% of its entire force and 40% of its prior service population. The prior service population makes up all subsequent term alignment program (STAP) Marines who have either reenlisted from active duty into the reserves or were a reservist who reenlisted. Another striking point to note is that during this time, the Marine Corps was growing to 202k.<sup>54</sup> It is possible that some prior-service reenlisted back into the active component, but the statistics are sobering. The overall personnel losses in the reserve component can be directly attributed to the eight years of conflict from 2001-2009. Employing the USMCR as an operational reserve is effective in short-term use but negative long-term effects will impact retention of the reserve force.

Figure 2



55

An operational reserve employment model has shown to potentially have devastating long term effects on reserve units and the personnel impacts are unique to Marine Forces Reserve (MarForRes). During 2006, 1st Battalion 25th Marine Regiment (1/25) activated in support of Operation Iraqi Freedom, but 1/25 did not have enough qualified and/or deployable Marines to fill its table of organization (T/O).<sup>56</sup> This caused the Regiment to activate Marines from 2nd Battalion 25th Marine Regiment (2/25), and essentially using two battalions to create one battalion that could deploy.<sup>57</sup> Interestingly enough, both battalions had previously deployed various capabilities and sub-units within the previous three years. Additionally, this has caused noticeable strain in the civilian sector with more employers not wanting to hire Marine Reservists.<sup>58</sup> In the pre-9/11 era of being a reservist, the requirements were very predictable with

the one weekend a month and the two weeks a year; employers could work around that schedule. However, given today's "new normal" of the operational reserve, less and less employers are willing to seek out and employ members of society that are actively involved in the reserves.<sup>59</sup> Further, analytical studies have shown that Marines who are mobilized within six months of joining a reserve unit have a 67% chance of leaving the reserves at the completion of the deployment.<sup>60</sup> These points further illustrate that the personnel issues within reserve units is a result of an operational reserve employment model and the force should revert to a strategic reserve construct.

### **Fiscal Analysis**

While employing the USMCR as an operational reserve has its benefits in maintaining requisite personnel with recent operational experience, the overall fiscal cost needs to be ascertained and examined for validity of long term sustainability. When a Marine Reservist is mobilized to augment the active component, the overall pay and allowances are more than deploying an active component Marine.<sup>61</sup> Additionally, on average, it costs 132% more to activate a reserve unit in comparison to a commensurate active duty unit, as depicted in Figure 3.<sup>62</sup> This amount comes from a fiscal cost analysis of activating 198 reserve Marines in support of Special Purpose Marine Air Ground Task Force (SPMAGTF) in 2016.<sup>63</sup> As depicted in Figure 3, the estimated cost to active 198 reserve Marines for SPMAGTF-16 would cost approximately \$22.3 million while the estimated cost to deploy a commensurate active duty unit would cost approximately \$16.8 million.<sup>64</sup> Given the fiscal cost analysis, this means it would have cost the Marine Corps approximately \$5 million less to use an active duty unit instead of a composite reserve force that was task organized across numerous commands. With the potential for future

fiscal austerity and uncertainty with continuous congressional Continuing Resolutions to fund the Department of Defense, senior leaders must decide if the fiscal cost to employ the USMCR as an operational reserve is worth the additional fund requirements. Since the overall cost to activate reserve Marines is 132% more than a commensurate active duty capability, reverting to a strategic reserve construct will assist in additional fiscal cost saving measures that could be applied elsewhere.

Figure 3.

| Cost Type                         | RC Unit Cost | Est AC Unit Cost | RC Savings Generated | RC Cost / AC Cost |
|-----------------------------------|--------------|------------------|----------------------|-------------------|
| Deployment Pay & Allowances (P&A) | \$5,599,679  | \$5,561,361      | -\$38,318            | -                 |
| Activated but not deployed P&A    | \$4,417,525  | \$0              | -\$4,417,525         | -                 |
| Dwell Time Pay & Allowances       | \$9,080,821  | \$11,277,204     | \$2,196,383          | -                 |
| OMMC Travel Costs                 | \$2,862,056  | 0                | -\$2,862,056         | -                 |
| Incremental RC Costs              | \$363,839    | 0                | -\$363,839           | -                 |
| Unit Life Cycle Cost              | \$22,323,920 | \$16,838,565     | -\$5,485,354         | 132.58%           |

The table depicts a deployment pay and allowances cost difference between RC and AC units.

65

In addition to increased costs to activate reserve units in support of an operational reserve employment construct, the cost to train the reserve forces have increased as well. In 2010, Marine Forces Reserve spent approximately \$123 million in training costs which was a 28% increase from the original forecasted appropriation.<sup>66</sup> When employing a reserve that is frequently tasked to deploy Marines, conduct security cooperation missions, and/or augment the active component, additional training must be conducted in order to ensure the reserve members are qualified to deploy or activate. Marine Reservists will often go on temporary Active Duty Operational Support (ADOS) orders, prior to their mobilization start date, to conduct pre-deployment training which adds time on orders and overall cost.<sup>67</sup> This type of activation is not



captured or correlated in the overall cost to mobilize reserve forces. As depicted in Figure 4, the levels of authority that are granted by law regarding who can mobilize reservists and for how long by category.<sup>68</sup> The aforementioned training cost with the increase in original fiscal plans, represents some of the ancillary costs that could be saved if the Marine Corps reverts to a strategic reserve model. Further, as depicted in Figure 5, between 2001 and 2009 an average of 6,900 Marines were activated/mobilized in support of the active component.<sup>69</sup> While the additional costs to continually utilize the USMCR may never truly be ascertained, the fiscal sustainability to continue an operational reserve model may not be the best utilization of taxpayer dollars and reverting to a strategic reserve may serve as a cost saving measure during times of fiscal austerity and uncertainty.

Figure 4.

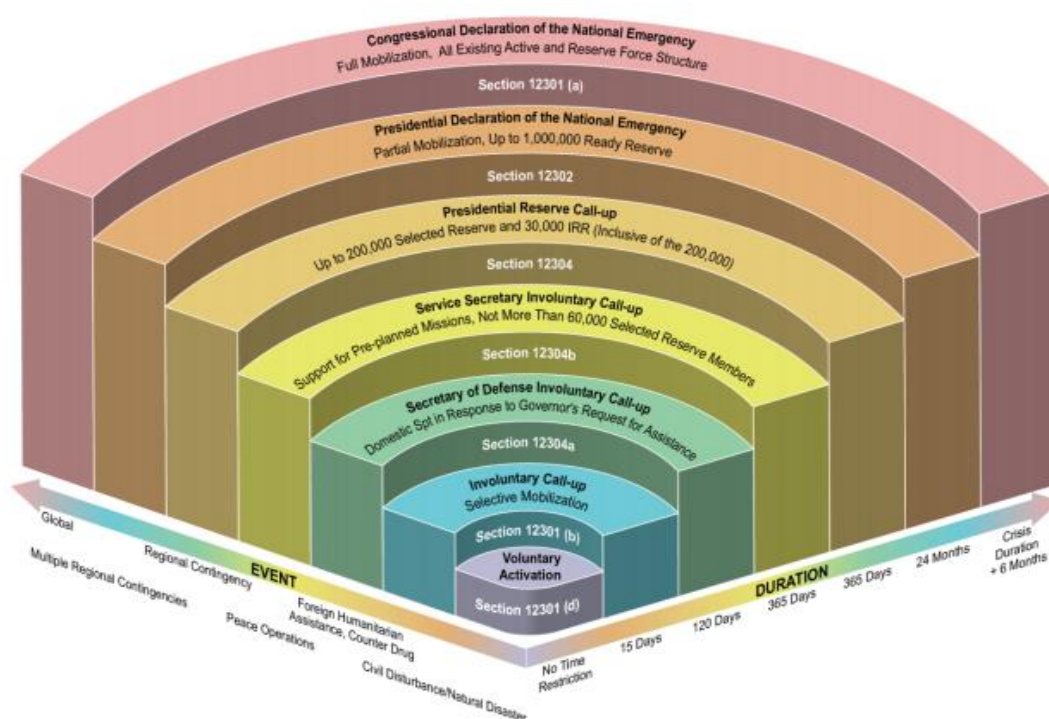
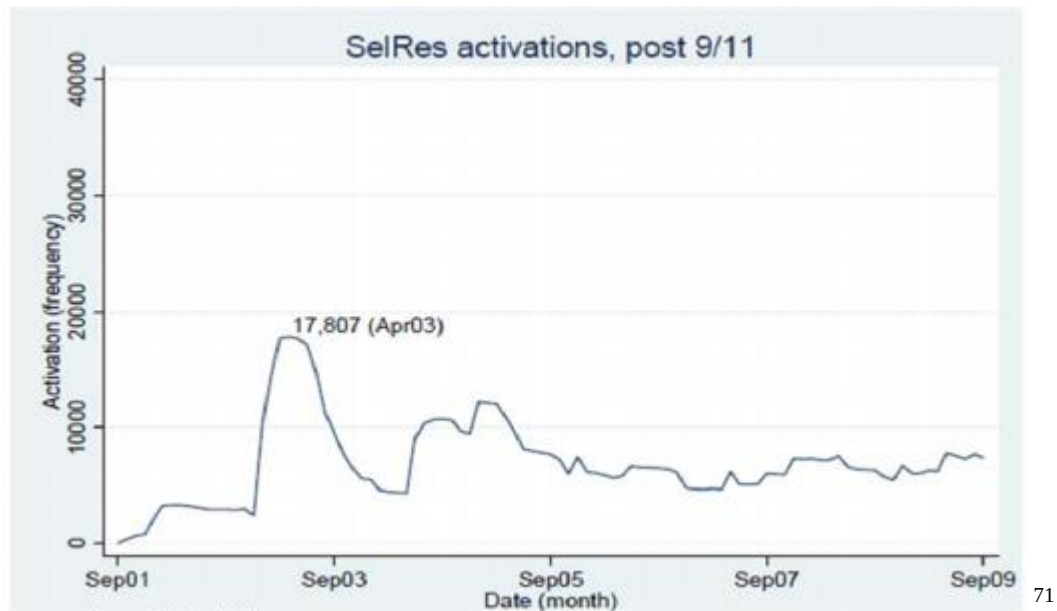


Figure 5.



71

## CMC Guidance

While the fiscal considerations cannot be ignored regarding the costs associated with having an operational reserve, the 38<sup>th</sup> Commandant, General David Berger, provided guidance concerning Marine Force Reserve in his recently published planning guidance. In his guidance, General Berger specifically stated:

While organized and equipped congruently, we cannot expect our Selected Marine Corps Reserve (SMCR) units to maintain the same levels of readiness as our Active Component units. What we desire and expect in our SMCR units and Individual Ready Reserve (IRR)

are Marines and units “ready for mobilization.” Once mobilized, Reserve Component forces will undergo additional pre-deployment training to achieve the necessary readiness for deployment and employment.<sup>72</sup>

In the only two paragraphs to his planning guidance on the USMCR, the CMC never states that he wants to continue with an operational reserve construct. Conversely, his guidance seems to allude to the point of reverting to a strategic reserve employment model and utilizing the United States Marine Corps Reserve as a doctrinal reserve to give him flexibility in employment in the event of another large scale decisive combat operations. Additionally, he is willing to accept risk of lower readiness levels of the reserve units in order to increase readiness levels of the active component units. In order to adhere to the Commandant’s Planning Guidance, it is only feasible to transition the USMCR from an operational reserve to a strategic reserve to meet General Berger’s intent as outlined in his guidance.

In addition to the Commandant accepting risk in the readiness levels of his reserve units, the Commandant also wants other changes to the reserve command relationships that could potentially revolutionize a new strategic reserve concept. General Berger states:

We will examine the merits of formalizing command relationships between Active and Reserve Component units. Just as the Active Component will change, so will our Reserve Component. As part of the force design effort, the Marine Corps will explore the efficacy of fully integrating our reserve units within the Active Component, as well as other organizational options.<sup>73</sup>

While the Commandant did not provide any further clarifying remarks or comments, it will be interesting to see how the command relationships are formalized and if Marine Forces reserve will be eventually integrated into the active component. Marine Forces Reserve possesses a unique chain of command structure that is not seen in any other component of the Marine Corps. In every reserve unit, there is the active duty Inspector-Instructor chain of command and the separate reserve chain of command. Neither chain of command has authority

over the other but they must operate together in the same unit. Depending on the personalities of the personnel filling both chains of command while conducting business, it has been known to cause strain within the unit. Formalizing and merging the chain of command would be a streamlined approach to integrating the reserve forces via the overall force design efforts. Creating one chain of command would be an innovative personnel management improvement in removing redundancies in billets and leadership positions. Implementing the Commandant's planning guidance by formalizing the command relationships would be beneficial to instituting a revolutionized strategic reserve construct in support of the future fight for efficiency and streamlined personnel management.

The Marine Corps is not the only branch of service that is exploring the idea of integrating the reserve and active duty units into one integrated chain of command and unit. In 2004, the Air Force provided many reasons why conducting workforce integration, the term to merge active and reserve units, would be beneficial.<sup>74</sup> The RAND Corporation discovered that the Air Force was in favor of workforce integration due to the following reasons: "1. Integration allows balancing personnel tempo appropriately among the components. 2. Integrations plays to the strengths of each component. 3. Integration provides a continuum of service, and expansion of institutional knowledge, and preservation of human capital."<sup>75</sup> Additionally, the Air Force also provided that workforce integration "can leverage the tremendous experience levels available in the guard and reserve; provides the ability to use active-duty airman to sustain increasing levels of deployment."<sup>76</sup> Further, all branches of service somewhat in favor of conducting varying degrees of workforce integration at some capacity but lack the top-down direction for such a massive overhaul of the personnel tables of organizations and equipment for an entire branch of service.<sup>77</sup> It is evident that all branches of service are discussing workforce integration, General

Berger is the only service chief to recently and publicly announce it in his planning guidance for the Marine Corps Reserve.

## **Recommendations**

Transitioning back to a strategic reserve from an operational reserve would potentially create a lack of familiarity and operational experience within the reserve ranks but options are available to maintain readiness at a reasonable cost in comparison to aforementioned fiscal statistics to mobilize reserve personnel. A strategic reserve would encompass utilizing the active component forces for all contingency operations, combat deployments, and/or other similar tours of duty while the reserve forces could potentially be utilized to augment the active duty forces in a non-deployed and/or garrison type environment to fill T/O shortfalls. It is widely known throughout the Marine Corps that Manpower & Reserve Affairs will not fill every table of organization to the perfect 100% of total allocated personnel but units are briefed during the Manpower & Reserve Affairs Roadshow to expect 80% unless your unit is deploying.<sup>78</sup> While Manpower & Reserve Affairs will do their best to staff a unit to its total strength, there are many factors that may contribute not being at 100%.<sup>79</sup> This means that every active duty unit will have personnel shortfalls unless they are deploying. If Marine Corps Reserve's mission is to "...for the purpose of augmenting and reinforcing the Active Component with trained units and individual Marines." Then it should not be outside the realm of possibility to have the strategic reserve forces be utilized in support of augmenting forces in a non-deployed status.<sup>80</sup> Additionally, Marine Forces Reserve regularly advertises billet shortfalls for mobilizations to support active duty units across the Marine Air Ground Task Forces, Marine Expeditionary Forces, and various billets opportunities via the global billet list on the Marine Forces Reserve

website.<sup>81</sup> Currently, there are over 122 billet shortfalls that the reserve component could fill but do not forcibly mobilize.<sup>82</sup> Utilizing the reserve forces to augment active component personnel shortfalls would be a force multiplying effort to maintain operational experience and foster a strategic reserve employment model while supporting the Commandant's Planning Guidance.

The operational reserve construct is not unique to the Marine Corps but has been adopted across the Joint Reserve Forces as well. The Army Reserve, Army National Guard, and Air National Guard has fully embraced being employed as an operational reserve, but is experiencing similar struggles as the Marine Corps in the areas of personnel readiness, sustainability, and potential fiscal considerations when activating personnel to augment the active component.<sup>83</sup> Similarly to the Marine Corps Reserve, the Army is built to be employed as a strategic reserve from its construct, statutory law, rules/regulations, personnel recruitment models, and how it is equipped.<sup>84</sup> The issues with personnel come down to simple math regarding the amount of personnel with the 1:5 year depth to dwell ratio.<sup>85</sup> Depending on how much of the reserve forces the government wants to mobilize in support of the active component, there could be issues with statutory dwell time after being activated.<sup>86</sup> The Marine Corps could face similar issues if both of the reserve forces are regularly called upon within the operational reserve employment model. For example, during the current operational reserve model, if ten percent of a unit was recently activated within the past year and a new national crisis emerges, the government cannot legally activate that same ten percent. This would lead to personnel gaps and shortfalls within the unit. However, every law has a waiver authority, but this example shows the flaw in the standard operational reserve employment model that could be reality in multiple branches of reserve forces across the joint force.

## Conclusion

The Marine Corps Reserve will continue to be a force multiplier in augmenting the active component for generations to come and unknown future conflicts. Whichever employment model the Commandant chooses to employ, the reserve forces will ultimately follow the order as best as possible to support the mission. However, the “new normal” of an operational reserve contrasts with the previous 83 years of being utilized as a strategic reserve when it was only called upon at the outbreak of large scale conflict. The Marine Corps might not have a reserve if it is not treated as what the doctrinal publications define as a reserve. Headquarters Marine Corps might direct the name change of Marine Forces Reserve to Fourth Marine Expeditionary Force (MEF) because it is utilized similarly as the other active component MEFs. The future is unclear but the sustainability of the Marine Corps’ Reserve’s ability to augment the active component may be in jeopardy if it does not revert to a strategic reserve employment model. From the increased costs to mobilize, to the personnel attrition during times of conflict, Marine Forces Reserve served its purpose during the wars in the Middle East. When implementing the Commandant’s Planning Guidance, the Marine Corps has the chance to revolutionize the strategic reserve employment model by merging the active duty and reserve chains of command and the reserves could be utilized to augment the active component in various personnel shortfalls throughout the Marine Corps. If the Commandant is willing to accept risk in the overall readiness of Marine Forces Reserve, it is only worthwhile to explore returning to a strategic reserve from the current operational reserve model. When the Commandant of the Marine Corps is willing to accept risk in readiness, the leaders of the Marine Corps Reserve need to explore where in the realm of “readiness” the risk should be taken. The risk could be taken in personnel staffing, the absolution of unnecessary units, or the equipment readiness could be an

option. Instead of the normal 90% goal of equipment readiness, 85% or 80% could be the new temporary standard. While these are all possibilities, no Commander wants to lower the standard without being explicitly directed to do so. The Marine Corps Reserve will always be ready to fight for the United States, but as the entire Marine Corps transitions from the past two decades of fighting wars in the Middle East, so too should the Marine Corps Reserve component. While the Marine Corps Reserve has been successful in fulfilling its temporary operational reserve mission, reverting to its doctrinal strategic reserve mission is necessary to sustain the force for long-term viability in the decades to come.



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