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OMB No. 0704-0188

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<b>1. REPORT DATE (DD-MM-YYYY)</b> 27-04-2021	<b>2. REPORT TYPE</b> Master of Military Studies (MMS) thesis	<b>3. DATES COVERED (From - To)</b> AY 2020-2021
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<b>4. TITLE AND SUBTITLE</b> A New Era for Special Forces: By, With, Through American Surrogates in Great Power Competition	<b>5a. CONTRACT NUMBER</b> N/A
	<b>5b. GRANT NUMBER</b> N/A
	<b>5c. PROGRAM ELEMENT NUMBER</b> N/A

<b>6. AUTHOR(S)</b> Bonanni, Brett T., Major, USA	<b>5d. PROJECT NUMBER</b> N/A
	<b>5e. TASK NUMBER</b> N/A
	<b>5f. WORK UNIT NUMBER</b> N/A

<b>7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES)</b> USMC Command and Staff College Marine Corps University 2076 South Street Quantico, VA 22134-5068	<b>8. PERFORMING ORGANIZATION REPORT NUMBER</b> N/A
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<b>9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES)</b> N/A	<b>10. SPONSOR/MONITOR'S ACRONYM(S)</b> N/A
	<b>11. SPONSOR/MONITOR'S REPORT NUMBER(S)</b> N/A

**12. DISTRIBUTION/AVAILABILITY STATEMENT**  
Approved for public release, distribution unlimited.

**13. SUPPLEMENTARY NOTES**

**14. ABSTRACT**  
As the United States emerges from almost 20 years of war against terrorism, security and defense strategy has shifted to Great Power Competition. This paradigm shift is focused on reorganizing and rebuilding the nation's defense architecture to compete with global powers. However, the United States must be able to do two things simultaneously, as the threat of terrorism and non-state actors is not disappearing. Moreover, the same global powers, whether established or rising, are sponsoring, operating, and competing through a variety of surrogates. Additionally, as anti-access, area denial systems (A2AD) become more sophisticated and the willingness to cross the threshold of open hostility is less tenable, future warfare will become increasingly focused on non-attributional and hybrid methods. Competition using militias, private military companies, technology, and other non-state actors, including terrorist organizations, is a manner through which nation-states will achieve security and economic objectives. USSF is uniquely manned, equipped, and possesses the mission, UW, to develop American surrogates to achieve success in the new operating environment.

**15. SUBJECT TERMS**  
Special Operations Forces (SOF), Special Forces, Surrogate Warfare, Unconventional Warfare, Antiaccess Area Denial (A2AD)

<b>16. SECURITY CLASSIFICATION OF:</b>			<b>17. LIMITATION OF ABSTRACT</b>	<b>18. NUMBER OF PAGES</b>	<b>19a. NAME OF RESPONSIBLE PERSON</b>	
<b>a. REPORT</b>	<b>b. ABSTRACT</b>	<b>c. THIS PAGE</b>			USMC Command and Staff College	
Unclass	Unclass	Unclass	UU	34	<b>19b. TELEPHONE NUMBER (Include area code)</b> (703) 784-3330 (Admin Office)	

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Quantico, Virginia 22134-5068

MASTER OF MILITARY STUDIES

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**A New Era for Special Forces: By, With, Through American Surrogates in Great Power Competition**

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

**AUTHOR:**

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AY 2020-21

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Approved: \_\_\_\_\_

Date: \_\_\_\_\_

## Executive Summary

**Title:** A New Era for Special Forces: By, With, Through American Surrogates in Great Power Competition.

**Author:** Major Brett T. Bonanni, United States Army

**Thesis:** The new operating environment of Great Power Competition will require the US to focus on hybrid or irregular warfare to maintain pressure on violent extremist organizations while simultaneously competing with great or emerging powers. The US should employ the United States Special Forces (USSF) to engage in the global development and employment of surrogate apparatuses and systems to compete with current and emerging great powers in the contemporary operating environment and remain below the threshold of armed conflict.

**Discussion:** As the United States emerges from almost 20 years of war against terrorism, security and defense strategy has shifted to Great Power Competition. This paradigm shift is focused on reorganizing and rebuilding the nation's defense architecture to compete with global powers. However, the United States must be able to do two things simultaneously, as the threat of terrorism and non-state actors is not disappearing. Moreover, the same global powers, whether established or rising, are sponsoring, operating, and competing through a variety of surrogates. Additionally, as anti-access, area denial systems (A2AD) become more sophisticated and the willingness to cross the threshold of open hostility is less tenable, future warfare will become increasingly focused on non-attributional and hybrid methods. Competition using militias, private military companies, technology, and other non-state actors, including terrorist organizations, is a manner through which nation-states will achieve security and economic objectives. USSF is uniquely manned, equipped, and possesses the mission, UW, to develop American surrogates to achieve success in the new operating environment.

**Conclusion:** USSF is the organization that can be tasked to develop and employ a US surrogacy program. This program will allow military and civilian leadership to focus on conventional force application to the more traditional competition against peer or near-peer militaries while the remainder of USSOF (SEALs, Rangers, MARSOC, and AFSOC) can focus on counterterrorism and targeted precision operations while furthering supporting efforts for conventional forces.

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## *Preface*

The idea for my research developed following several guest speakers and discussions on Great Power Competition early in my attendance at Marine Corps Command and Staff College. Ideas and approaches focused on solely on conventional forces and their proposed structures or activities. Missing from the dialogue was any mention of Special Operations Forces. So, I began to think deeply about what the Special Operations community would do in this new operating environment and paradigm. I quickly discovered that I was not alone and that many within Special Operations were examining the future as well. Through the research contained in this paper is my humble contribution to the on-going examination of the future of Special Forces in the new operating environment.

A tremendous amount of appreciation and gratitude go to Dr. Christopher Harmon for his professional expertise, guidance, and advice during my research and writing. His assistance during my research was truly invaluable. To LTC Jeremy Glauber for his unwavering support and mentorship during this endeavor. He was a crucial sounding board for ideas, at times eccentric, and always offered sensible guidance to keep me on track with research and writing. LTC Glauber truly lives the ethos of what it means to be a Green Beret and his dedication to the future of the Special Forces Regiment is remarkable. *De Oppresso Liber!*

## Introduction

As the United States emerges from almost 20 years of war against terrorism, security and defense strategy has shifted to Great Power Competition.<sup>1</sup> This paradigm shift is focused on reorganizing and rebuilding the nation's defense architecture to compete with the global powers, Russia and China. However, the United States must be able to do two things simultaneously, as the threat of terrorism and non-state actors is not disappearing but may even accelerate with the proliferation of emerging technologies, such as AI. Moreover, the same global powers, whether established or rising, we seek to compete with are sponsoring, operating, and competing through a variety of surrogates. Additionally, as anti-access, area denial systems (A2AD) become more sophisticated and the willingness to cross the threshold of open hostility is less tenable, future warfare will become increasingly focused on non-attributional and hybrid methods. Competition using militias, private military companies, technology, and other non-state actors, including terrorist organizations, is a manner through which nation-states will achieve security and economic objectives in the new operating environment.

The US must adapt and operate effectively in the new operational environment in order to safeguard national interests and security. One method the US may adapt to the new operating environment and ever evolving global situation is through the development and employment of its own surrogate forces. As Jean-Marc Rickli succinctly defines a *surrogate*, “[t]he surrogate is an actor or a technological tool that absorbs the patron’s political, operational, or financial burden of conflict.”<sup>2</sup> Thus, *surrogate warfare*, according to Andreas Krieg and Rickli, is “[t]he externalization, partially or wholly, of the strategic, operational, and tactical burden of war to human or technological surrogates with the principal intent of minimizing the patron’s own burden of war...”<sup>3</sup> The surrogate force of the new operating environment may take on the form

of guerrilla groups, mercenaries, private military corporations, information, autonomous technology, terrorist groups, or even a state sponsored organization that are leveraged to achieve the patron's or sponsor's goals.<sup>4</sup>

Surrogate warfare also provides the ability for the patron or the sponsor of the surrogate to “minimize the burden of warfare to its [patron] taxpayers, policymakers, military personnel, and the country or organization as a whole.”<sup>5</sup> This unique aspect of surrogate warfare increases the opportunity to limit attribution to the patron thus decreasing the potential for vertical escalation with competitors or adversaries. Moreover, the non-attributional factor for the patron is elevated by using surrogates during low-intensity conflicts that enable the masking of sponsorship and action.<sup>6</sup> This may help the patron prevent vertical escalation with nuclear capable and militarily advanced actors.

The new operating environment of Great Power Competition will require the US to focus on hybrid or irregular warfare to maintain pressure on violent extremist organizations while simultaneously competing with great or emerging powers. The US should employ the United States Special Forces (USSF) to engage in the global development and employment of surrogate apparatuses and systems to compete with current and emerging great powers in the contemporary operating environment and remain below the threshold of armed conflict. Although USSF specializes in a wide range of special operations, its primary mission is the conduct of unconventional warfare (UW). USSF is the only force within the US Department of Defense authorized to conduct UW making the unit unique in their training and ability to execute covert and clandestine operations with a resistance or a surrogate force.

The conduct of UW makes USSF unique in their ability to generate surrogate forces and employ them in non-attributional ways. To better understand these operations and the basic tasks

associated with the unconventional environment, *Army Doctrinal Publication 3-05: Army Special Operations*, defines Unconventional Warfare as:

A broad spectrum of military and paramilitary operations, normally of long duration, predominantly conducted through, with, or by indigenous or surrogate forces who are organized, trained, equipped, supported, and directed in varying degrees by an external source. It includes, but is not limited to, guerrilla warfare, subversion, sabotage, intelligence activities, and unconventional assisted recovery.<sup>7</sup>

As the definition highlights and implies, USSF must specialize in the ability to infiltrate a denied area and engage in a spectrum of military and paramilitary operations, including the establishment of non-attributable surrogate forces. Accordingly, the US's use of USSF to establish surrogate forces and engage in surrogate warfare is not only supported by Army doctrine but provides the US (patron) with a viable strategic option to compete in the Great Power Competition while simultaneously maintaining a focus on counterterrorism. Despite the appropriateness of waging unconventional warfare through the use of non-attributional surrogate forces, employing USSF in this manner presents a challenge to the US's ability to remain within the currently accepted Law of Armed Conflict and humanitarian laws. Furthermore, if the US fails to execute non-attributional surrogate warfare correctly, the US will fail to counter the threats posed by the new operating environment and degrade its credibility on the world stage. Put simply, the US could be viewed as the oppressive actor if the implementation of American surrogates is not done deliberately and with the appropriately vetted forces.

A key comparison that warrants discussion is the difference between surrogate warfare and proxy warfare. The distinction between the two forms of warfare is the addition of advanced technologies within the information, physical, and psychological realm.<sup>8</sup> Scholars

currently studying the evolution of modern warfare created this divergence to enable the examination and application of artificial intelligence weaponry in the form of drones, robotics, deep neural network algorithms to rapidly developing surrogates in warfare.

US adversaries have been keenly employing surrogates in their own versions of modern warfare for many years. While the US has been focused on combating global terrorism and threats to the homeland by violent extremist organizations, countries like Russia and Iran have seized the opportunity to weaken US influence and power through surrogates. Whether it is Russia's Gerasimov Doctrine and the use of private military corporations (PMC) or Iran's support to terrorist organizations such as Hezbollah, the application of surrogates to achieve national objectives is an area the US must understand more intensely so as to compete.<sup>9</sup> Only by understanding how adversaries and great power competitors perceive and function within the competition continuum can the US and, more specifically, the Department of Defense counter its adversaries' activities. This paper seeks to provide a recommendation for how the US can unite strategy and forces to efficiently confront and counter adversarial gray zone operations in future irregular warfare in the new operating environment.

### **Not A New Paradigm, But A New Environment**

The 2017 National Security and Defense Strategy highlights the US's shift from global counterterrorism operations and contingencies to the Great Power Competition and this shift has been echoed by military strategic leaders. Although this document will likely change with a newly elected administration, the focus on power competition will likely remain a consistent theme.<sup>10</sup> Adversaries and competitors to the US are evolving at increasing rates and with increasing complexity. Threats to US national interests and security cannot be simply

contained by pure military might and action, but rather US action must span multiple instruments, domains, and vehicles.

Competition as it relates to military planning and operations is not described as war or peace but rather as a continuum. As *Joint Doctrinal Note 1-19* describes the competition continuum as:

[A] world of enduring competition conducted through a mixture of cooperation, competition below armed conflict, and armed conflict. Within the continuum lie several areas of campaigning that range from cooperation to armed conflict. In the middle lies the area of campaigning below armed conflict<sup>11</sup>

This area is commonly referred to as the gray zone and is where the majority of competition occurs in Great Power Competition. Constant assessment and reassessment over time is required to successfully campaign below armed conflict. The nature of this type of competition requires the necessity to constantly observe actions and reassess strategy to remain below the threshold of violence or risk provoking vertical escalation.<sup>12</sup> *JDN 1-19* leaves much to be desired in the way of details on how the Department of Defense use forces to compete; however, it does provide a solid definitional and conceptual foundation to expand upon.

The competition continuum has affected the way senior leaders currently view the new operating environment. As the current Commandant of the Marine Corps, GEN David H. Berger, states in *Marine Corps Doctrinal Publication 1-4, Competition*, “Western conceptions of the international struggle among nations (and other political actors) often use binary war or peace labels to describe it. The actual truth is more complicated...The competition continuum encompasses all of these efforts, including the use of violence.”<sup>13</sup> GEN Berger has charged the Marine Corps to think critically about a new approach to achieving security objectives and to

develop innovative methods and techniques of competing in the contemporary operating environment. Regardless of the innovative methods conceived by conventional forces, a conventional force will inevitably be confined to planning for conflict against a near-peer's main force, leaving much of the competition continuum unattended and vulnerable to exploitation by both state and non-state adversaries. Similar to *JDN 1-19*, *MCDP 1-4* is a good starting point to expand the operationalization of competition as it relates to military forces. Moreover, *MCDP 1-4* relates the competition continuum to military forces. Moreover, *MCDP 1-4* enables both conventional force and Special Operations Forces (SOF) planners to better nest and collaborate during future operations.

As the US shifts focus to major land and sea formations paired against near-peer adversaries, an organizational and operational gap begins to emerge. This gap is created as force structure, security procedures, and regulations are focus away from counterinsurgency (COIN) and counterterrorism (CT). Non-state actors, violent extremist organizations (VEOs), and surrogate forces will seek to exploit this gap as the US's attention focuses elsewhere. A global environment rife with VEOs still exists and cannot simply be ignored. The US must employ SOF to fill the gap in COIN and CT while simultaneously enabling Great Power Competition focused efforts. USSF conducting Irregular or Unconventional Warfare is the vehicle through which the US can accomplish both security requirements.<sup>14</sup>

While the Department of Defense orients and focuses operations, training, and force structure on Great Power Competition, non-state actors such as terrorist organizations continue to conduct campaigns and activities world-wide. United States SOF must be the preferred force that addresses this issue while providing support to Great Power Competition military activities. By focusing USSF on the UW aspect of surrogates, decision makers and

military planners alike will be able to address both simultaneously. USSF is geographically aligned and, through persistent engagement with indigenous forces, possesses the access and placement to begin developing and preparing the operational environment for Great Power Competition while continuing to address nefarious non-state actors. USSF can be the nexus to accomplish objectives in this type of hybrid operational concept.

### **The Gray Zone in Great Power Competition**

Nation-states can compete, influence, and achieve strategic objectives through military activities that typically involve covert and clandestine means, which fall below armed conflict on the competition continuum. In the “gray zone”, nation-states “[u]nwilling to risk major escalation with outright military adventurism...are employing sequences of gradual steps to secure strategic leverage...below the thresholds that would generate a powerful U.S. or international response...”<sup>15</sup> Gray zone activities are “...characterized by intense political, economic, informational, and military competition more fervent in nature than normal steady-state diplomacy, yet short of conventional war.”<sup>16</sup> This area is where unconventional forces are designed to operate with efficiency and precision. Moreover, the gray zone is where surrogate operations are appropriate and effective in providing non-attributional effects that avoid vertical escalation.

The adversaries of the US have become increasingly skilled at engaging and disrupting US interest through the use of gray zone activities. While the US focused on combatting global terrorism for two decades, its global competitors and adversaries have developed and employed gray zone tactics with increasing success. Competition in the gray zone is not novel, as the Cold War era witnessed intense gray zone competition between the US and the

Soviet Union through surrogates or proxies.<sup>17</sup> Considering the USSF's primary mission consists of waging UW and the fact that USSF is the only force authorized to engage in UW, the US can best employ USSF to compete in the gray zone by conducting unilateral operations and developing an in-depth surrogate network, which if operationalized and synchronized, effectively provides an instrument for the US to counter competition and secure strategic objectives.

SOF and, USSF provide US policy and decision makers with a strategic option to shape the security environment through “the prudent employment of coercive force, by empowering an indigenous opposition element, [which] can force a target government to do something it might not be otherwise inclined to do.”<sup>18</sup> This statement refers to the capability that USSF possesses within the UW construct to influence and shape the operational environment through indigenous surrogates to achieve national objectives. Further, the surrogacy implied within this version of UW provides decisionmakers a tool to avoid overt military operations that risk vertical escalation. In this manner, the risk of vertical escalation is mitigated through the low-visibility, non-attributional activities with insurgencies or resistance movements.<sup>19</sup> Ideally, surrogate activities conducted by USSF through either indigenous personnel or technological means would be executed covertly or clandestinely, meaning, the operation and members could not be traced to the US if the activity is detected. Critical to this idea is the persistent engagement and relationship building that USSF operators already conduct globally.<sup>20</sup>

## **Russian Surrogacy**

PMCs and paramilitary operations are key to Moscow's engagement and strategy to compete in Great Power Competition and are used as a cut-out to avoid attribution or international controversy. Further, the incorporation of PMCs as a "shadow special forces" is critical to achieving the resurrection of Russian global power with plausible deniability of foreign interference abroad.<sup>21</sup> Russia heavily employs surrogates in the form of PMCs to achieve national objectives while avoiding the domestic unpopularity of Russian soldier deaths with the Russian citizenry all while maintaining deniability in private military corporation's operations. As Dr. Yuval Weber notes during his presentation at the Marine Corps University's Krulak Center:

[Russian PMCs] are part of a full suite of Russian client management services: defensive and offensive kinetic capabilities; social media and electoral manipulation; regime maintenance; assistance in breaking international laws and conventions.<sup>22</sup>

From this suite, there is one specific corporation that is the predominant and most prolific of Russian PMCs that also sustains strong ties with the government in Moscow. The Wagner Group and its parent umbrella company Concord Management has conducted operations in almost every continent and typically precedes Russian government forces or policy.

The Wagner Group is a private military corporation that emerged in 2014 alongside the Ukrainian separatist movement. The Wagner Group is the core of the Russian government's surrogate activities that protect its foreign interests, secure global influence, and achieve national strategic objectives.<sup>23</sup> USSF has engaged this force during combat operations in Syria. The engagement ended in an embarrassing disaster for the Russian government which was using the Wagner Group to support Bashar al-Assad's Syrian Army and the US-backed rebel forces

prevailed; leaving, according to multiple sources, over 100 mercenaries dead and many more wounded.<sup>24</sup>

Russian law forbids mercenary groups from operating within its borders and its citizens from participating in mercenary activities. However, Russia's use of surrogate or proxy forces has been a mainstay of Russian strategy throughout history.<sup>25</sup> Moreover, their lack of legal status makes them very appealing for employment in the gray zone.<sup>26</sup> During the Cold War, Moscow was in its golden era of exercising surrogate operations to compete and counter US containment activities without triggering vertical escalation. Since the fall of the Soviet Union, the Russians have emerged with a renewed willingness to employ surrogates and have increased their usage in recent years as the strategy gains momentum and success. As Dr. Weber states, “[the Wagner Group] has been in every Russian fight and influence campaign since 2014.”<sup>27</sup> Because the Wagner Group is part of a larger company, Concord Management, there exists complimentary information and cyber capabilities (Internet Research Agency and Patriot Media Group) that enhance operations and create a comprehensive PMC strategy.<sup>28</sup> USSF, through the employment of surrogates, can counter Russian private military corporations as demonstrated in Syria. The US would need to label the Wagner Group as a foreign terrorist organization which enables proactive targeting of the corporation, as well as set the precedent on how to deal with others that will inevitably surface in the future. Coupled with USSF surrogate development and operations, the US would be in an excellent position to apply defense, financial, and diplomatic measures to curtail Russian surrogate activities worldwide thus limiting the Russian government's ability to compete.

When looking at how the Russians perceive modern warfare, one must examine the ideas presented by the current Chief of the General Staff of the Russian Armed Forces, Valery

Gerasimov. The “Gerasimov Doctrine” espouses the inclusion of political, economic, informational, and other varieties of non-military measures to compete in the gray zone. Gerasimov is an unconventionally thinking military leader who ascribes to the idea that “we (Russia) should not copy other people’s experience and catch up with leading countries but work ahead of the curve and be in the leading positions.”<sup>29</sup> Moreover, Gerasimov champions the use of covert deception by Russian special operations and surrogacy. In the words of Gerasimov, “[r]emote contactless impact on the enemy becomes the main way to achieve the goals of combat and operation...These include the use of special operations forces and internal opposition forces to establish a permanent front throughout the opposing State...”<sup>30</sup> Further, Russian military activities seek to establish non-state actor groups such as youth movements and minority ethnic groups. As A.J.C. Selhorst explains, “[d]uring the Estonia, Georgia, and Ukraine conflicts, Russia established civilian capabilities such as youth groups and state media and mobilized Russian ethnic minorities abroad by appealing to the feelings of marginalization...a perception that Mother Russian has more to offer than the native country.”<sup>31</sup> It is through this apparatus that Russia is able to destabilize regions to achieve national and strategic objectives.

Gerasimov is a student of the Arab Spring and the “Color Revolutions” who views modern warfare and great power competition occurring in the gray zone through non-state actors and surrogates. Hence, he applies this concept to the execution of Russian military action as witnessed in Crimea, Ukraine, and most recently Belarus. He and Vladimir Putin understand how to manipulate the geopolitical environment to gain legitimacy and momentum in their operations. The basis for all of Russia’s regional activities has been to protect ethnic Russians and domestic sovereignty from perceived Western aggression.<sup>32</sup> Through the examination of the Arab Spring and the collapse of the Soviet Union, the necessity for domestic legitimacy has become a

significant concern and consideration by which the Russians gain international legitimacy. In other words, the Russian citizenry's cries to free the oppressed to the international community cannot go ignored and their grievances must be addressed, or Russia takes military action.

Lastly, but perhaps most importantly, is the examination of Gerasimov's operational framework or what he defines as the science of modern warfare. As figure 1 illustrates, there exist six phases in the framework by which the Russian military resolves interstate conflict: 1. Concealed origin, 2. Escalation, 3. Outbreak of conflict activity, 4. Crisis, 5. Resolution, Restoration of peace. This framework is a conditions-based model that graduates escalation and activities as the environment is set.<sup>33</sup> A remarkable feature to the framework is how the conduct of information warfare is continuous throughout all phases. Gerasimov's model directs the use, and quite possibly the weaponization, of information as a surrogate to accomplish Russian objectives. Moreover, the information operations bridge the realms or operational areas of nonmilitary and military measures. One of the core missions of USSF is the conduct of information operations, therefore it would not be a significant change to incorporate information surrogates into a comprehensive strategy that puts USSF at the forefront of these types of operations.

Figure 1

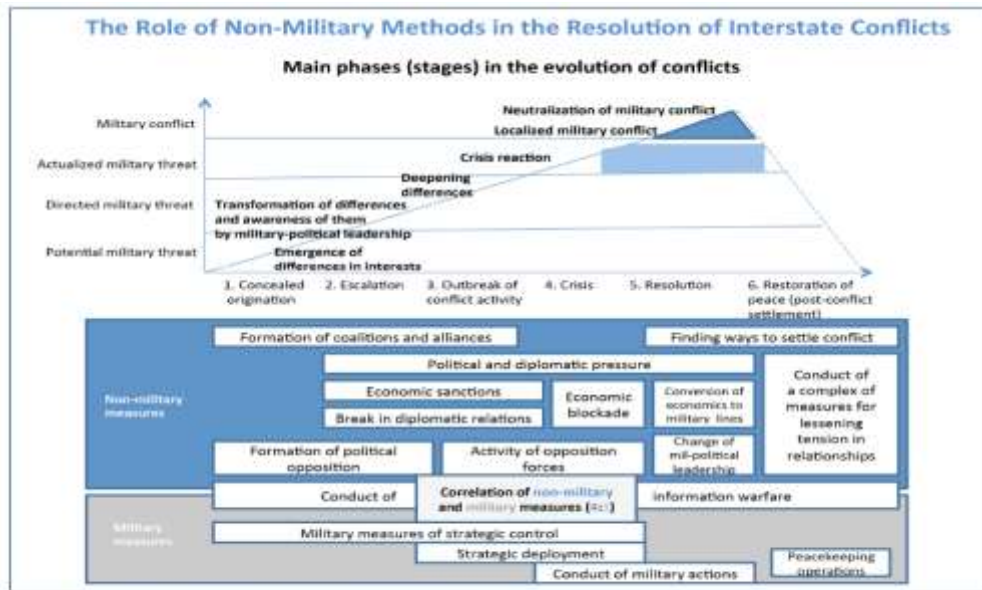


Figure 1 The Role of Non-Military Methods in the Resolution of Interstate Conflicts, Source: Valery Gerasimov, 'The value of science in anticipation,' VPK news, 27 February 2014. Accessed 2 July 2014, <http://www.vpk-news.ru/articles/14632>. Translated and created by Dr. G. Scott Gorman, School of Advanced Military Studies

Gerasimov’s operational framework is strikingly similar to how USSF already perceives, plans, and conducts UW. Therefore, his concepts and architecture are not radically divergent from how USSF qualifies and trains the force. Where Gerasimov’s concept differs is in the reliance and integration of surrogates. The application of surrogates is appropriate and showcased at every phase of the Gerasimov Doctrine which enables Russia’s military and political leaders the ability to maintain low signature and attribution which in turn minimizes the risk of vertical escalation with their adversaries. USSF is apt to apply these same techniques to counter Russia; in fact, this framework is not new to USSF. The newer idea is the incorporation of surrogate identification and development for implantation within an irregular warfare framework.

### Iranian Surrogacy

Iran employs a similar strategy as Russia when operating in the gray zone through surrogates. However, Iranian surrogate strategy includes supporting and operationalizing

terrorist organizations and Shia militia groups. This strategy is accomplished through the covert and clandestine activities of the Islamic Revolutionary Guard Corps' (IRGC) Qods Force. The Qods serve as the action arm through which Iran conducts the development and employment of surrogates.<sup>34</sup> The Qods Force primarily conducts all operations and activities in the gray zone through operations that include kinetic and non-kinetic actions and, more importantly, through surrogates such as the Shia Militia Groups, Iraqi Popular Mobilization Forces, or terrorist organizations like Hezbollah.

United States policy towards Iran has been narrowly focused on counterproliferation of weapons of mass destruction and ignores the multifaceted approach Tehran employs to protect and export the Iranian Revolution. As such, US policy has failed to thoroughly address Iranian regional covert and surrogate activities. Iran has expanded such efforts to international activities. As Modell and Asher state, "U.S. policy towards Iran has focused mainly on addressing the nuclear challenge, but it has overlooked the threat posed by Iran's global revolutionary network."<sup>35</sup> The US must adopt policy to conduct similar covert and clandestine surrogate activities to fully contain and counter Iranian influence and, most importantly, willingness to support terrorism. By leveraging and employing surrogates, the US can position to better protect national interests and her citizens.

To understand why Iran behaves the way it does, we need to examine how Iran perceives itself and potential threats. Iranian security strategy seeks to protect the national Islamic revolution and autocratic rule. Additionally, the Iranian regime wishes to export its revolution and keep external threats at bay by developing proxy actors outside of its borders. Surrogacy is a centerpiece to Iranian defense strategy, as Krieg and Rickli explain, "Iran's strategic defense relies on its ability to mobilize militias as surrogates domestically and

overseas to protect its borders as much as it relies on ballistic missiles, tanks, and fighter jets.”<sup>36</sup> Proxy war enables Iran to “commit strategic enemies—such as the United States, Israel, and Saudi Arabia—to engaging in hostilities outside the borders of Iran.” (Krieg and Rickli pg. 189)<sup>37</sup> Much of Iran’s strategy stems from a deep paranoia about foreign interference which is observed throughout Iranian history that predates the revolution. The Iranian revolutionary regime views itself as a liberator of the oppressed which reflects on the usage of surrogates to destabilize areas where foreign influence is predominate.

To execute the Iranian surrogate policy, the IRGC developed the Qods Force to conduct the covert and clandestine activities necessary to achieve objectives. The Qods maintain a hybrid of functions such as intelligence collection, special operations, and diplomatic activities.<sup>38</sup> All operations and activities, kinetic and non-kinetic, are conducted covertly and primarily through surrogates such as the Shia Militia Groups, Iraqi Popular Mobilization Forces, or terrorist organizations such as Hezbollah. By the developing, influencing, and operationalizing surrogates that further the objectives of the Iranian regime, Iran projects influence and protects the revolution.<sup>39</sup> Iran has consistently and successfully operated in the gray zone more than any Western nation-state.<sup>40</sup>

The actions of Iranian forces and surrogates is widely known and highlighted in news articles and books for SMG support and operations in Iraq, support for Hezbollah in Lebanon, and backing SMGs in Yemen. These activities showcase the savviness and ability of the Qods to operate in the gray zone through surrogates. Iranian gray zone surrogate activities are principally focused on the Middle East region to counter Israeli, US, and Sunni Muslims; however, Iran is operating much closer to US borders.<sup>41</sup> For instance, Qods-backed surrogates such as Hezbollah have surfaced and conducted terrorist attacks in Latin America. As J. Hirst

notes, "Iran's penetration into Latin America is of strategic importance to the Islamic Republic as it attempts to build diplomatic allies, launder sanctioned money, and position its Revolutionary Guards and terrorist proxies to attack western targets."<sup>42</sup> Within the lawless tri-border area (TBA) of Paraguay, Brazil, and Argentina where Hezbollah works with drug cartels to raise money and grow Islamic communities that assist in exporting the Iranian revolution. Hezbollah views the TBA as the most important base of operations to their cause next to Lebanon.<sup>43</sup>

Further, Iranian government officials frequently visit Venezuela and maintain diplomatic and economic ties with the Maduro regime. Iran is enjoying influence and access to establish networks of operatives that could potentially conduct terrorism in the western hemisphere on the vulnerable southern approach to the US. The activities of the Qods and Hezbollah in South America can be expected to continue and grow unless addressed. However, the USSF possesses the skills and operational capability to counter Iranian surrogates worldwide. Regional expertise and ability to gain access to at-risk areas provide policy makers and military decision makers strategic tools to apply to the Iranian problem. USSF surrogate activities may include infiltrating an area or country, assessing partisan networks and groups, establishing contact with a viable group, training, and employing the group to resist or fight against Iranian surrogates. This approach coupled with the previous nuclear and economic restrictions on Iran provide a more comprehensive plan of action to contain, counter, and compete against the rogue regime in Tehran.

## **Counter A2AD Applications and How AI Can Save the Day**

As adversarial A2AD systems become increasingly more lethal and effective, the US must find new methods to penetrate enemy defenses prior to and during a major conflict. The answer to defeating these A2AD systems may lie within the realm of surrogate warfare. USSF, through the employment of surrogates and granting of authorities can enable the identification and strategic sabotage of adversarial A2AD systems. *Joint Publication 3-18* specifically mentions the use of SOF to neutralize enemy A2AD systems and capabilities during Joint Forcible Entry Operations or operations to establish a lodgment in a denied area to enable the massing of combat power for follow-on combat operations.<sup>44</sup> USSF retains as one of its a core missions the identification, development, and the employment of the type of covert and clandestine networks that would directly assist in sabotage and military operations to neutralize enemy A2AD systems. Moreover, prior to the initiation of combat operations, attribution can be masked and, in some cases, the act itself obscured which enables more time for conventional forces to transit and mass. The activities associated with these types of missions can be further focused on preparing the environment to enable the success of a conventional force through access and placement in areas to conduct counter-A2AD actions.<sup>45</sup>

Additionally, US cyber capabilities, as a surrogate in itself, can augment human surrogate groups to execute an operation that defeats or temporarily disables adversarial A2AD networks. Modern adversarial long-range missile systems are linked to a digital network and must maintain this link to function and fire. The digital network creates a vulnerability that US cyber assets, defense and interagency, can exploit thus limiting the enemy's use of stand-off weapons.

In addition to digital networks, AI interfacing can extend to robotics to eliminate the necessity of human risk during forcible entry operations in an advanced A2AD environment.

As Valery Garasimov notes:

Another factor influencing the change in content of modern modes of armed struggle is the use of modern robotic systems for military purposes and research in the field of artificial intelligence. In addition to flying drones today, the battlefield will be filled with walking, crawling, jumping and flying robots. In the near future, it is possible to create fully robotic formations capable of conducting independent combat operations.<sup>46</sup>

The idea of robotic surrogates is a revolutionary, yet a logical concept given the velocity at which technology is developing. The idea and possibility of employment could potentially trigger yet another paradigm shift in modern warfare. The development of AI robotic systems is well underway with Hong Kong based Hanson Robotics *Sophia* and the Chinese company CloudMinds' implementation of AI robots to examine people for symptoms of COVID-19 during the global pandemic. These two companies have made significant progress towards fully autonomous systems that have realistic humanoid features and advanced neural network algorithms.<sup>47</sup> Hanson Robotics *Sophia* is so advanced that it has given a key note speech to the United Nations on the promises of AI as well as it has been granted citizenship by the Kingdom of Saudi Arabia.<sup>48</sup>

Looking ahead and attempting to be predictive, USSF in this environment would act as the connective tissue and liaison between robotic AI "soldier" systems and human decision makers. Small teams can establish and prepare the environment for AI insertion in addition to providing and maintaining control and direction of the systems on the ground during employment. This application decreases initial attribution by minimizing the human footprint, decreasing signature until conditions are ready for follow on operations. Moreover, in the context of a forcible entry operation, USSF can establish specific entry or landing

points for these systems while maintaining a type of “terminal guidance” similar to terminal guidance in the execution of airstrikes during combat operations.

Lastly, the incorporation of AI robotic units could augment and fortify a UW network. The addition of AI robotics to the guerilla and axillary structure could enhance their operations and assist USSF in achieving operational objectives. These AI robots would conduct the same duties as the humans, but with less risk if captured or engaged by enemy forces. The AI robots would also be synchronized with AI information networks and neural algorithms, based on machine learning mechanisms, to increase operational success and a continual source for on-going psychological operations. Again, USSF would be the handler of these units and provide direction and command in the execution of the AI’s activities with the human surrogate network.<sup>49</sup>

### **Moving Forward with Certain Uncertainty**

The future of warfare is complex and will challenge how the US and other nations have historically conceptualized and structured their armed forces. The US is waking up to a global environment filled with irregular and unconventional competitors and an increasingly complex competition paradigm. Within this environment USSOF is challenged with how to maintain pressure against violent extremist organizations while supporting the conventional forces’ competition activities and operations against near-peer adversaries. This challenge is exceptionally difficult as SOF is already a small force and currently struggles to fill missions to satisfy the increasing demand for their skill set and capabilities. However, USSF must refocus back to their roots and original purpose, UW.<sup>50</sup>

The challenge will be in letting go of direct-action missions and focusing more on the traditional foreign internal defense deployments and, more importantly, the development and employment of surrogate networks. USSF is at a pivotal moment to provide critical capabilities and options in Great Power Competition through surrogate activities targeted at our adversaries. The US government, within the Irregular Warfare Annex of the NDS, is directing and emphasizing UW-type activities to counter Chinese and Russian influence. USSF would miss a crucial opportunity to remain the nation's best strategic defense option.<sup>51</sup>

An additional challenge to the idea of US-backed surrogates is how to maintain their activities and actions within the confines of international and humanitarian laws. However, this challenge further strengthens the argument to have USSF as “handlers” or, at least, the bridge between the US government and the realization of national objectives when dealing with surrogacy or proxy forces. USSF operators are inculcated during through the initial qualification and training pipeline to become a Green Beret on the imperativeness to identify compatible resistance groups and insure they adhere to international laws regarding the conduct of hostilities, targeting, and treatment of hostiles. In this manner, USSF serves as a risk mitigation mechanism to enable the proper identification and employment of compatible surrogates. Examples of surrogate success can be seen in the initial invasion into Afghanistan and Iraq with the use of the Northern Alliance and Peshmergha respectively. These two forces, with unknown allegiances and motives, were utilized to destabilize and conduct military operations as surrogates with USSF as the force multiplier that directed their application.

This idea also extends to the utilization of technological surrogates as well by enabling the employment of such platforms with human control over actions, activities, and operations

such as kinetic and non-kinetic targeting. Similarly, USSF would need to “program” specific parameters into the actual technical surrogate while monitoring the insertion or employment activity of the technology. However, current authorities and funding limit these functions and the ability to conduct activities within the AI realm.

Authorities and funding for USSF to operate and develop irregular and surrogate forces is derived from US Code Title 10, Section 127e. According to Section 127e:

The Secretary of Defense may, with the concurrence of the relevant Chief of Mission, expend up to \$100,000,000 during any fiscal year to provide support to foreign forces, irregular forces, groups, or individuals engaged in supporting or facilitating authorized ongoing military operations by United States special operations forces to combat terrorism.<sup>52</sup>

The authorities and funding to develop surrogates under 127e are for use in combating terrorism, meaning, the program needs to be updated and overhauled to enable USSF’s surrogate program for competition.<sup>53</sup> USSF has effectively utilized the 127e program during counterterrorism operations in multiple theaters with various surrogates. The program is largely classified and deserves a more extensive study in itself; however, the basic idea of expanding these authorities to encompass Great Power Competition activities is how USSF can legally and financially implement a surrogate program. The exact sum of funding also deserves further research, and a pilot program or proof-of-concept should be established to determine an appropriate baseline amount. Lastly, a modest expansion of the 127e program provides an additional layer of oversight for decision makers, thus ensuring the US does not become party to developing and funding rogue or extremist organizations.

It is important to note that the way forward requires USSF to refocus on its roots, Unconventional Warfare. Since 9/11, USSF has been increasingly used as a direct action and foreign internal defense force in counter terrorism operations. A victim of its own success in

that it takes a smaller footprint to accomplish, successfully at that, combat operations with USSF than with conventional forces. There are elements of irregular warfare that have been employed over the years, but for the most part USSF has been invested in highly kinetic raids and clearance operations in Afghanistan, Iraq, and Syria. This gravitation to direct action is a result of the withdrawal of conventional forces in-line with troop drawdown policies which made USSF the economy-of-force structure in which to continue to pressure terrorist organizations and the Taliban. Now that the US is arriving at the Great Power Competition paradigm, USSF must increase the value on language and UW-type training to prepare for entry into the modern military operations arena. Moreover, an overhaul on the current rural UW concept must extend to the complexities and sophistication of conducting irregular and resistance operations in the urban environment.

Ambiguity and uncertainty are what the adversaries and competitors to the US wish to project in order to raise and maintain their power. Moving into the modern operating environment, USSF is a strategic tool to provide clarity for decision makers and to secure US interests. The medium through which UW and surrogate operations are conducted has evolved, but, as history has shown, Green Berets are an adaptable and agile force. USSF possesses a long history of conducting similar activities to those offered in this document. Harkening back to the Jedburgh teams of the Office of Strategic Services who dropped into Nazi controlled France during WWII to unite and employ resistance groups to destabilize and set conditions for conventional forces to oust the occupiers,<sup>54</sup> USSF remains the force that can operate with minimum visibility, lower risk, high rate of success, and at a relatively low cost.

Surrogates are increasing in relevance in the future of conduct of warfare. Therefore, as the US moves into a new era of competition and military activities filled with counter near-

peer adversaries, rapidly developing technologies, and the always present terrorist threat, serious development and employment of American surrogates is warranted. Indicated by Russia's use of private military corporations, the development of Valery Gerasimov's operational framework, and by Iranian Qods use of terrorist surrogates, it is clear that this form of warfare is already underway. An area that requires additional research is the techniques used by the People's Republic of China and the effectiveness of their surrogates against the US. The common theme, however, is that warfare is rapidly evolving to incorporate non-attributional and non-traditional means. Thus, USSF is the organization that can be tasked to develop and employ a US surrogacy program. This program will allow military and civilian leadership to focus on conventional force application to the more traditional competition against peer or near-peer militaries while the remainder of USSOF (SEALs, Rangers, MARSOC, and AFSOC) can focus on counterterrorism and targeted precision operations while furthering supporting efforts for conventional forces.

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#### Notes

<sup>1</sup> Donald J. Trump, *The National Security Strategy of the United States of America* (Washington, DC: The White House), pg. 27.

<sup>2</sup> Jean-Marc Rickli, *Surrogate warfare and the transformation of war in the 2020s* (orf.com), pg.1.

<sup>3</sup> Andreas Krieg and Jean-Marc Rickli, *Surrogate Warfare: The Transformation of Warfare in the Twenty-First Century* (Georgetown University Press, Washington, DC), pg.58.

<sup>4</sup> Ibid.

<sup>5</sup> Ibid, pg. 4.

<sup>6</sup> Ibid, pg. 3.

<sup>7</sup> Joint Chiefs of Staff, *Joint Publication 3-05.1: Joint Special Operations Task Force Operations* (Washington, DC: Department of Defense), pg. GL-16.

<sup>8</sup> Rickli, pg.2.

<sup>9</sup> Krieg and Rickli, pg. 178.

<sup>10</sup> James Mattis, *The National Defense Strategy of the United States of America* (Washington, DC: Department of Defense), pg.1-11 and Trump, pg. 1-4.

<sup>11</sup> Joint Chiefs of Staff, *Joint Doctrine Note 1-19: Competition Continuum* (Washington, DC: Department of Defense), pg. v-vi.

<sup>12</sup> Ibid, pg. 7-9.

<sup>13</sup> United States Marine Corps. *Marine Corps Doctrine Publication 1-4: Competition*. (Washington, DC: Department of the Navy), pg. 3.

<sup>14</sup> Claire Graja, *SOF and the Future of Global Competition* (CNA Corporation Report, Arlington, VA), pg. i.

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- <sup>15</sup> Michael J. Mazarr, *Mastering the Gray Zone: Understanding A Changing Era of Conflict* (Carlisle Barracks, PA: US Army War College Press), pg. 1.
- <sup>16</sup> Unconventional Warfare in the Gray Zone (Votel, Cleveland, Connett, and Irwin) pg.102.
- <sup>17</sup> Ibid.
- <sup>18</sup> Joseph L. Votel, et al, *Unconventional Warfare in the Gray Zone* (Joint Force Quarterly), pg.104.
- <sup>19</sup> Ibid, pg.105.
- <sup>20</sup> Ibid, pg. 109.
- <sup>21</sup> Dr. Yuval Weber. *Russian Private Military Companies and Great Power Competition* (Marine Corps University, Quantico, VA, June 18, 2020), PowerPoint presentation and Podcast, <https://www.youtube.com/watch?v=knWwCKPMzMQ>.
- <sup>22</sup> Ibid
- <sup>23</sup> Amy Mackinnon, *How Videos of a Gruesome Killing by Russian Wagner Group Mercenaries Became a Rallying Point for Ultranationalists Online* (foreignpolicy.com), pg. 1-2.
- <sup>24</sup> Alex Locke, *Report: Leaked Audio of Russians on Humiliating Defeat by US Forces* (businessinsider.com), pg. 1-2.
- <sup>25</sup> Mackinnon, pg. 3.
- <sup>26</sup> Paul Stronsky, *Implausible Deniability: Russia's Private Military Companies*, (Carnegie Endowment for International Peace), pg. 1.
- <sup>27</sup> Dr. Yuval.
- <sup>28</sup> Ibid.
- <sup>29</sup> Valery Gerasimov, *The Value of Science in Foresight: New Challenges Call for Rethinking the Forms and Ways of Fighting* (VPK News, Moscow Russia), pg. 7.
- <sup>30</sup> Gerasimov, pg. 3
- <sup>31</sup> Tony, Selhorst, *Russia's Perception Warfare: The Development of Gerasimov's Doctrine in Estonia and Georgia and Its Application in Ukraine*, (Netherlands: Militaire Spectator), pg. 150.
- <sup>32</sup> Selhorst, pg. 151.
- <sup>33</sup> Selhorst, pg. 150-151 and Gerasimov pg. 2-4.
- <sup>34</sup> Scott Modell and David Asher, *Pushback: Countering the Iran Action Network* (Washington, DC: Center for A New American Security), pg. 9.
- <sup>35</sup> Modell and Asher, pg. 8.
- <sup>36</sup> Krieg and Rickli, pg.165.
- <sup>37</sup> Ibid.
- <sup>38</sup> Modell and Asher, pg. 9.
- <sup>39</sup> Ibid.
- <sup>40</sup> Mazarr, pg. 2.
- <sup>41</sup> Krieg and Rickli, pg.170-188.
- <sup>42</sup> Hirst, pg. 21-32.
- <sup>43</sup> Jorge A. Rivera, "Iranian Influence in Latin America" (Army University Press, Ft. Leavenworth, KS), pg. 3
- <sup>44</sup> Joint Chiefs of Staff, *Joint Publication 3-18: Joint Forcible Entry Operations Joint* (Washington, DC: Department of Defense), pg. I-6, IV-3, IV-14.
- <sup>45</sup> Department of Defense, *Joint Operational Access Concept* (Washington, DC: US Dept of Defense), pg. 22.
- <sup>46</sup> Gerasimov, pg. 4.
- <sup>47</sup> Hanson Robotics, accessed April 3, 2021, <https://www.hansonrobotics.com> and CloudMinds, accessed April 3, 2021, <https://www.en.cloudminds.com>.
- <sup>48</sup> Hanson Robotics.
- <sup>49</sup> The inclusion of the Joint Force would also be necessary for support and additional programming. Meaning, Special Forces would be responsible for the doctrinal application and "partnering" whereas a branch such as the Air Force provides the hardware and software development and maintenance. Additionally, the application of such AI systems and concepts enables the larger DoD enterprise to expand employment into other domains. For example, the Navy and Space Force can implement these "forces" based on Special Forces' doctrine and advisement into the sea and space domains. Special Forces would not own AI surrogates, rather they are the employers.
- <sup>50</sup> Chris Miller and Doug Livermore, *Special Forces needs to get back to basics to win against China and Russia* (taskandpurpose.com), pg. 1-2.
- <sup>51</sup> Ibid, pg. 2.
- <sup>52</sup> 10 U.S. Code § 127e - Support of special operations to combat terrorism.

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<sup>53</sup> Kyle Rempfer, “Special operations launches ‘secret surrogate’ missions in new counter-terrorism strategy” (militarytimes.com), pg. 2-4.

<sup>54</sup> Miller and Livermore pg. 4.

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- 10 U.S. Code § 127e - Support of special operations to combat terrorism. Cornell Law School:  
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