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Monterey, CA; Naval Postgraduate School

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**NAVAL  
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**MONTEREY, CALIFORNIA**

**THESIS**

**THE UTILITY OF IRREGULAR WARFARE  
IN GREAT POWER COMPETITION**

by

James G. Hall and William T. Pitt

December 2020

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REPORT DOCUMENTATION PAGE			Form Approved OMB No. 0704-0188	
Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instruction, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302, and to the Office of Management and Budget, Paperwork Reduction Project (0704-0188) Washington, DC, 20503.				
<b>1. AGENCY USE ONLY</b> (Leave blank)	<b>2. REPORT DATE</b> December 2020	<b>3. REPORT TYPE AND DATES COVERED</b> Master's thesis		
<b>4. TITLE AND SUBTITLE</b> THE UTILITY OF IRREGULAR WARFARE IN GREAT POWER COMPETITION			<b>5. FUNDING NUMBERS</b>	
<b>6. AUTHOR(S)</b> James G. Hall and William T. Pitt				
<b>7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES)</b> Naval Postgraduate School Monterey, CA 93943-5000			<b>8. PERFORMING ORGANIZATION REPORT NUMBER</b>	
<b>9. SPONSORING / MONITORING AGENCY NAME(S) AND ADDRESS(ES)</b> N/A			<b>10. SPONSORING / MONITORING AGENCY REPORT NUMBER</b>	
<b>11. SUPPLEMENTARY NOTES</b> The views expressed in this thesis are those of the author and do not reflect the official policy or position of the Department of Defense or the U.S. Government.				
<b>12a. DISTRIBUTION / AVAILABILITY STATEMENT</b> Approved for public release. Distribution is unlimited.			<b>12b. DISTRIBUTION CODE</b> A	
<b>13. ABSTRACT (maximum 200 words)</b>  The publication of the 2017 <i>National Security Strategy</i> and the 2018 <i>National Defense Strategy</i> generated renewed focus on great power competition (GPC). This research sought to determine if and how irregular warfare could shape the current competitive environment by analyzing historical case studies and applying lessons from successes and failures to the contemporary era. The research determined that irregular warfare can shape the competitive environment in two primary ways: by disrupting America's competitors in the achievement of their national objectives, and in strengthening a partner's capacity for resilience and resistance to a great power's aggression. Additionally, the research uncovered the importance of preparing irregular options ahead of a crisis for use in the event of escalation to traditional conflict. In light of these forms of irregular warfare and of the ever-increasing complexity in the competitive space, it was determined that small, agile, and purpose-built teams with broad irregular warfare capabilities should be created to execute irregular warfare campaigns, not missions, that consider the overall intent, the trajectory of the environment, and the place in the national irregular warfare strategy for GPC. Ultimately, this research has determined that the United States must embrace competition and the objectives of irregular warfare parallel with the goals of GPC; therefore, irregular warfare should be a central component of the American GPC strategy.				
<b>14. SUBJECT TERMS</b> great power competition, irregular warfare, Russia, Iran, Syria			<b>15. NUMBER OF PAGES</b> 109	
			<b>16. PRICE CODE</b>	
<b>17. SECURITY CLASSIFICATION OF REPORT</b> Unclassified	<b>18. SECURITY CLASSIFICATION OF THIS PAGE</b> Unclassified	<b>19. SECURITY CLASSIFICATION OF ABSTRACT</b> Unclassified	<b>20. LIMITATION OF ABSTRACT</b> UU	

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**THE UTILITY OF IRREGULAR WARFARE IN GREAT POWER  
COMPETITION**

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Submitted in partial fulfillment of the  
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**MASTER OF SCIENCE IN DEFENSE ANALYSIS  
(IRREGULAR WARFARE)**

from the

**NAVAL POSTGRADUATE SCHOOL  
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## ABSTRACT

The publication of the 2017 *National Security Strategy* and the 2018 *National Defense Strategy* generated renewed focus on great power competition (GPC). This research sought to determine if and how irregular warfare could shape the current competitive environment by analyzing historical case studies and applying lessons from successes and failures to the contemporary era. The research determined that irregular warfare can shape the competitive environment in two primary ways: by disrupting America's competitors in the achievement of their national objectives, and in strengthening a partner's capacity for resilience and resistance to a great power's aggression. Additionally, the research uncovered the importance of preparing irregular options ahead of a crisis for use in the event of escalation to traditional conflict. In light of these forms of irregular warfare and of the ever-increasing complexity in the competitive space, it was determined that small, agile, and purpose-built teams with broad irregular warfare capabilities should be created to execute irregular warfare campaigns, not missions, that consider the overall intent, the trajectory of the environment, and the place in the national irregular warfare strategy for GPC. Ultimately, this research has determined that the United States must embrace competition and the objectives of irregular warfare parallel with the goals of GPC; therefore, irregular warfare should be a central component of the American GPC strategy.



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## **LIST OF ACRONYMS AND ABBREVIATIONS**

FID	foreign internal defense
GPC	great power competition
IRGC	Iranian Revolutionary Republican Guard
NSS	National Security Strategy
NDS	National Defense Strategy
PMF	popular mobilization forces
SOF	special operation forces
SWPA	Southwest Pacific Allied Command
USAFIP-NL	United States Armed Forces in the Philippines, North Luzon
USAID	United States agency for international development

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## **ACKNOWLEDGMENTS**

We would like to thank our advisors, Dr. Kalev Sepp and Dr. Patricia Blocksome, for their continued support and guidance throughout this entire process. We are grateful to professors Glenn Robinson, Doug Borer, and Afshon Ostovar, who helped shape our initial thoughts into coherent ideas. Lastly, we would like to thank our families for their patience during the long hours spent researching and writing this thesis.

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## I. IRREGULAR WARFARE IN GREAT POWER COMPETITION

The 2017 U.S. National Security Strategy (NSS) identified strategic competition between state actors, more commonly known as great power competition (GPC), as the nation's top national security priority.<sup>1</sup> However, the bulk of discussion among national security and defense experts has since centered around nuclear deterrence, new operational concepts and domains, high-end conventional warfare, superior conventional weapons technologies, and innovative weapon system development and deployment.<sup>2</sup> Although many of the ideas, topics and categories mentioned are important, they generally serve to deter enemy military action or to destroy the enemy military in the event that action is taken. While these are important aspects of the GPC discussion, critical analysis of how best to compete and win during the renewed competition phase is largely missing from the dialogue.<sup>3</sup>

Though no universal definition exists for GPC, nations engaged in it inherently seek to improve their global or regional geopolitical position vis-à-vis their primary challengers. Therefore, the essence of GPC can be understood with three factors: First, a nation seeks to impose cost on a state adversary, without provoking war, to weaken that country's global

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<sup>1</sup> Donald Trump, "The National Security Strategy of the United States of America" (Washington, DC: The White House, December 2017), 2.

<sup>2</sup> Ronald O'Rourke, *Renewed Great Power Competition: Implication for Defense-Issues for Congress*, CRS Report Number R43838 (Washington, DC: Congressional Research Service, April 7, 2020), 17–18, <https://fas.org/sgp/crs/natsec/R43838.pdf>; Heather Graham-Ashley, "CSA Discusses Army's Growth, Modernization, Readiness during 2-Day Visit to Hood," Fort Hood Sentinel, July 19, 2018, [http://www.forthoodsentinel.com/news/csa-discusses-army-s-growth-modernization-readiness-during-2-day-visit-to-hood/article\\_05c2a64a-8aaa-11e8-a32c-ebb36700efba.html](http://www.forthoodsentinel.com/news/csa-discusses-army-s-growth-modernization-readiness-during-2-day-visit-to-hood/article_05c2a64a-8aaa-11e8-a32c-ebb36700efba.html); Paul McLeary, "Flatline: SecDef Esper Says DOD Budgets Must Grow 3–5%," *Breaking Defense*, February 06, 2020, <https://breakingdefense.com/2020/02/flatline-secdef-esper-says-dod-budgets-must-grow-3-5/>.

<sup>3</sup> Department of Defense, *Summary of the Irregular Warfare Annex to the National Defense Strategy* (Washington, DC: Department of Defense, 2020), 4, <https://media.defense.gov/2020/Oct/02/2002510472/-1/-1/0/Irregular-Warfare-Annex-to-the-National-Defense-Strategy-Summary.PDF>; Eric Robinson, "The Missing, Irregular Half of Great Power Competition," *Modern War Institute*, September 8, 2020, <https://mwi.usma.edu/the-missing-irregular-half-of-great-power-competition/#:~:text=Secretary%20of%20Defense%20Mark%20Esper,bases%20in%20the%20Indo%2DPacific>; David Vergun, "Great Power Competition Can Involve Conflict Below Threshold of War," U.S. Department of Defense, October 2, 2020, <https://www.defense.gov/Explore/News/Article/Article/2364137/great-power-competition-can-involve-conflict-below-threshold-of-war/>.



or regional standing; second, a state seeks to expand its influence in an effort to increase its own global or regional status; and third, nations seek to keep what they have won by protecting or defending their collected gains.

To date, the United States has focused on more overt efforts like deterring aggression via conventional military show of force to improve its position globally. America's strong record of conventional military prowess has forced its competitors to adopt a strategy more in line with the first two factors of GPC. Russia, China and Iran, the latter of which is being included as in this discussion because of its regional stance against the United States in the Middle East, have each developed methods of imposing cost on the United States or of expanding influence as a means of amplifying their power projection. Though each has accomplished this in different ways, those ways have generally involved asymmetric warfare, hybrid warfare, active measures, or unrestricted warfare, to name only a few. Essentially, these competitors have developed irregular methods of weakening the United States or expanding their own influence. Each of these cases will be discussed later in further detail, but it is important to identify their efforts as extra-conventional in order to consider appropriate responses.

If the United States truly seeks to compete and win in the competition phase without crossing into the conflict phase, it must consider irregular warfare as its primary vehicle. Paralleling the first two strategies of GPC, the essence of irregular warfare is to impose a cost using non-standard or unexpected means on an enemy from a minimally exposed position to achieve a national or strategic objective. Similar to GPC, irregular warfare can also be understood as a non-standard or unexpected effort to expand influence to achieve a national or strategic objective. Definitions are important, but when one cuts through semantics and analyzes the core of what is trying to be accomplished, a clear parallel

emerges between GPC and irregular warfare. This paper argues that irregular warfare,<sup>4</sup> is the capability currently contained within the U.S. military that affords the most effective strategy; it provides the most likely path to victory in GPC, helping perpetuate an American-led, free and open international order. When viewing the strategic map as arenas of GPC, the United States needs to decide where it seeks to impose cost, where it seeks to expand influence and where it seeks to defend or retain what it already possesses. In the first two arenas, the imposition of cost through indirect confrontation and expansion influence, proper application of irregular warfare allows the United States to strengthen where it decides to and to weaken its adversaries in other areas. The decision to do nothing may also be appropriate when the benefits of either type of action cannot be determined or when an adversary's missteps warrant no further action.

When irregular warfare is applied, either in its cost imposition or influence expansion form, its strategic output when successful should net a national or strategic gain. Its collective execution across various theaters should then constitute an irregular warfare approach to or strategy for GPC, expanding influence when appropriate, but also forcing an adversary to overextend in other circumstances. To defend or retain a stable state-to-state relationship, deterrence and defense may be enough, although relationships, which can be strengthened through irregular activities like foreign internal defense (FID) or security force assistance, will likely play important roles as well. The more deftly irregular warfare is applied, then the more likely the United States will be at emerging from this bout of GPC in a position of strength.

Though this parallel between GPC and irregular warfare remains theoretical, practical applications throughout American history demonstrate the utility of irregular

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<sup>4</sup> Department of Defense, *Irregular Warfare*, DOD Directive 3000.07 (Washington, DC: Department of Defense, 2017), [https://fas.org/irp/doddir/dod/d3000\\_07.pdf](https://fas.org/irp/doddir/dod/d3000_07.pdf). The document essentially defines Irregular Warfare as a blanket term describing non-conventional warfare, which may incorporate traditional warfare and the use of conventional weapons. According to this directive, Irregular Warfare is “a violent struggle among state and non-State actors for legitimacy over the relevant populations.” This document also uses the term irregular to “describe a deviation from the traditional form of warfare where actors may use non-traditional methods such as guerrilla warfare, terrorism, sabotage, subversion, criminal activities, and insurgency for control of relevant populations.” According to the document, IW also includes “any relevant DOD activity and operation such as counterterrorism; unconventional warfare; foreign internal defense; counterinsurgency; and stability operations.”

warfare as a means to a strategic or national end. Irregular warfare has the potential to weaken America's adversaries in relevant areas, expand American influence in contested areas where the United States decides to invest, and protect areas already considered solidly inside the U.S. sphere of influence. By committing to a GPC strategy that includes a well-developed plan irregular warfare, the United States can shape the current era of GPC in America's, and indeed the democratic world's, favor.

## **A. RESEARCH QUESTIONS**

This paper examines two related research questions: How can irregular warfare enable the U.S. to influence the competition phase of great power competition? How can this approach simultaneously prepare irregular forces and irregular warfare options for employment during the anticipated conflict phase?

## **B. LITERATURE REVIEW**

As the United States slowly withdraws from residual military engagements of the Global War on Terrorism, it has reengaged with a world of aspiring powers who seek to challenge American global influence and dominance. The 2017 NSS identified revisionist powers (China and Russia), rogue powers (Iran and North Korea) and transnational threat groups as the principal threats to American stability and security.<sup>5</sup> To a varying degree, each of these groups seeks to "erode American security and prosperity."<sup>6</sup> In response to the shift from a nearly complete focus on counterterrorism and counterinsurgency efforts to a greater emphasis on interstate strategic competition, the National Defense Strategy (NDS) acknowledged the "increasingly complex global security environment characterized by overt challenges to the free and open international order and the re-emergence of long-term strategic competition between nations."<sup>7</sup> Both the NSS and the NDS clearly call for the nation to refocus on competing globally with emerging or near-peer states. However,

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<sup>5</sup> Donald Trump, "The National Security Strategy of the United States of America"

<sup>6</sup> Trump, 2.

<sup>7</sup> Jim Mattis, "Summary of the 2018 National Defense Strategy," 2018, 2.

the reemphasis on strategic competition has generated different interpretations across the defense community.

Leaders with a more extensive conventional background have identified the need for investment in conventional military power because the NSS and NDS essentially require the United States military to improve readiness, reestablish deterrent threats, and prepare for war with revisionist and rogue powers. Taken solely on its face, competition with other great powers certainly increases the potential of a global conventional war, and it remains necessary, as it always has been, to prepare for major combat operations against capable enemies. In response to the rising concern over Russian and Chinese military advances, the U.S. Army Training and Doctrine Command presented an operating concept known as *Multi-Domain Battle*. The principle purpose of the published work is to “identify how the Army, working as part of the Joint Force, will operate against these peer adversaries to maintain U.S. interests, deter conflict, and, when necessary, prevail in war.”<sup>8</sup> Though it does briefly mention special operations forces as well as the competition phase, the U.S. concept primarily addresses how the larger conventional military force will need to operate in future wars against an equally advanced force. Clearly, and rightfully, the conventional side of the U.S. military is searching for ways to operate in a constrained environment after nearly 50 years of operating with supremacy across most domains.

While the need to fight and win wars is paramount, the emphasis that the NSS and NDS place on competition indicates that the United States also needs to actively compete now, not simply prepare for war. In order to contend now, the United States also needs to assess its adversaries and determine how they are competing. Dr. David Kilcullen’s book, *The Dragon and the Snakes*, seeks to understand the current environment and how near-peer nations are seeking to compete with the United States. In short, Kilcullen argues that American success in conventional war and failure in asymmetric war over the last 30 years has taught America’s enemies how to fight against the west. Writing about non-state enemies Kilcullen argues that, “our adversaries have adopted a suite of ‘offset strategies’

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<sup>8</sup> Department of Defense, *Multi-Domain Battle: Evolution of Combined Arms for the 21st Century, 2025–2040* (Washington, DC: Department of Defense, 2017), [https://www.tradoc.army.mil/Portals/14/Documents/MDB\\_Evolutionfor21st.pdf](https://www.tradoc.army.mil/Portals/14/Documents/MDB_Evolutionfor21st.pdf)

to sidestep our conventional power.”<sup>9</sup> Extending his argument, he notes that “while we were struggling to deal with the nonstate offset strategies, state adversaries were busy developing offset strategies of their own.”<sup>10</sup> It follows that America’s enemies, based on lessons learned, will not play to America’s strengths. Instead, they will compete asymmetrically before war and will likely fight in a similar hybrid fashion during war.

In response to the actions of America’s enemies, many military leaders, policy makers, and defense analysts have argued for a comprehensive response that counters adversarial actions during the competition phase. Author of the 2018 NSS Dr. Nadia Schadlow, writing for War on the Rocks in 2014, discussed the need to operate between “passivity and large-scale intervention.”<sup>11</sup> In her article she argues that “the United States vacates the space between war and peace. And because [America’s adversaries] cannot match American military power directly, it is in this space...that America’s enemies and adversaries prefer to operate.”<sup>12</sup> In response to the on-going competition in that space, Dr. Schadlow advocates for efforts to maintain peace because it “must be actively and consistently maintained by engaging in the political competitions that are its constant feature.”<sup>13</sup>

Writing on the topic of the “Gray Zone,” Generals Joseph Votel and Charlie Cleveland identify the need for “organized political warfare” at the national level.<sup>14</sup> Continuing in their argument, they assert that though political warfare employs the full spectrum of tools at a nation’s disposal, “SOF are optimized for providing the preeminent military contribution to a national political warfare capability because of their inherent

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<sup>9</sup> David Kilcullen, *The Dragons and The Snakes: How the Rest Learned to Fight the West*, (New York, NY: Oxford University Press, 2020), 19.

<sup>10</sup> Kilcullen, 20.

<sup>11</sup> Nadia Schadlow, “Peace and War: The Space Between,” War on the Rocks, August 18, 2014, <https://warontherocks.com/2014/08/peace-and-war-the-space-between/>.

<sup>12</sup> Schadlow.

<sup>13</sup> “Peace and War: The Space Between,” War on the Rocks, August 18, 2014, <https://warontherocks.com/2014/08/peace-and-war-the-space-between/>.

<sup>14</sup> Joseph L. Votel et al., “Unconventional Warfare in the Gray Zone,” 2016, 102.

proficiency in low-visibility, small-footprint, and politically sensitive operations.”<sup>15</sup> Without directly identifying the broad category, the authors identify irregular warfare conducted by SOF as a critical element to competing in the “Gray Zone.” They conclude by asserting that such activities give the United States the best chance to “win” or maintain “positional advantage” over America’s principal competitors.<sup>16</sup>

Numerous other authors have similarly concluded that irregular or asymmetric activities must be undertaken by U.S. SOF to compete with its competitors’ hybrid approach to competition and warfare. Frank Hoffman also identified the need to avoid “overlooking the unconventional approaches used by our Russian and Chinese competitors.”<sup>17</sup> In addition, in 2016 Strategic Studies Institute researchers recommended that the United States “develop actionable and classified strategic approaches to discrete gray zone challenges and challengers.”<sup>18</sup> It further asserts that the need to “develop and employ new and adaptable concepts, capabilities, and organizational solutions to confront U.S. gray zone challenges.”<sup>19</sup> Finally, in another study commissioned by the Army War College, Michael Mazarr concludes that “Competing successfully in this arena demands commitment to steady, coherent, long-term strategies. In some cases, as in responding to clandestine proxy wars, it can require operating in the shadows and taking actions that cannot be publicly acknowledged.”<sup>20</sup>

Despite consistent recognition of the value of irregular warfare, asymmetric activities or political warfare, few researchers offer more than general ideas on what competition in the gray zone or the current competition phase will entail. This issue is generally afforded a few pages in an author or researcher’s concluding remarks, which may

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<sup>15</sup> Votel et al., 102.

<sup>16</sup> Votel et al., 108.

<sup>17</sup> Frank Hoffman, “On Not-So-New Warfare: Political Warfare vs Hybrid Threats,” *War on the Rocks*, July 28, 2014, <https://warontherocks.com/2014/07/on-not-so-new-warfare-political-warfare-vs-hybrid-threats/>.

<sup>18</sup> Nathan Freier et al., *Outplayed: Regaining the Strategic Initiative in the Gray Zone* (Carlisle Barracks, PA: Army War College, 2016), 78–79.

<sup>19</sup> Freier et al., 84–86.

<sup>20</sup> Michael J. Mazarr, “Mastering the Grey Zone: Understanding a Changing Era of Conflict,” December 1, 2015, 158.

reflect a well-defined characterization of the problem, but does so without dedicated thought to specific, effective and strategic solutions. However, as Generals Votel and Cleveland identified, while other instruments of national power must be committed, irregular warfare employed by SOF present a wide-range of strategic options that can shape and influence the current competitive environment, potentially preventing major war with near-peers. As a result, this study seeks to fill the current research gap, by identifying specific elements of irregular warfare that can be used to influence the current competitive environment.

The second gap, and the central problem with the majority of current scholarship regarding irregular warfare is its focus on actions required in the competition phase; their work does not translate to or address the legitimate arguments being made by conventional military leaders. As identified above, the stakes of major war between near peers are markedly higher than other types of conflict. To that end, this study seeks to bridge both research gaps by both exploring the potential for irregular activities to stave off major theater war while also preparing for it. This will be accomplished by analyzing the actions of America's adversaries in the competition phase and by exploring America's past experiences with irregular warfare in both competition and conflict. In doing so, this research will not only seek to identify specific and wide-ranging options that can be executed in the competition phase, but will also prepare irregular forces and irregular warfare options for employment during major combat operations.

The search for answers and options that build and remain relevant across phases of GPC is critical because those options can become the cornerstone of strategy. Actions and options, isolated by phase, risk being isolated solutions forced by enemy actions. Instead, options that span all phases of GPC will allow military leaders to think strategically by prioritizing actions in the current phase that could be employed as a supporting effort should conflict escalate to open military hostilities. Ultimately, filling these gaps in strategic thinking could increase U.S. effectiveness in shaping current and future environments. For this reason, it is the focus of this study.

### **C. APPROACH METHODOLOGY**

In order to address these gaps and determine actions that may enable the United States to compete in the current environment and also prepare for future conflict, this study is organized into the following chapters. Chapter II argues that GPC will be characterized by irregular conflict; it does this by analyzing and assessing the predominant contemporary responses to increased competition with near-peer adversaries, and how the U.S. is currently responding. It uses case studies of adversarial actions taken by Russia, China and Iran during the Syrian Civil War. Each of these adversaries clearly executed their own brand of hybrid, asymmetric or irregular warfare while also appearing to modernize its military. In response, the United States has focused its efforts on preparing for high intensity conflict, potentially ignoring an advantage it could attain by focusing more on irregular warfare in pre-conflict competition. The chapter closes by identifying critical elements regarding how and where along the spectrum of conflict America's principal competitors gain an advantage.

Chapter III looks at how irregular warfare can be used offensively, to impose costs and cause wicked problems for adversaries. This chapter presents case studies that examine the American experience with various forms of irregular warfare, and notes how irregular warfare provided strategic benefits. First, this study will analyze American support to the mujahedin in Afghanistan during the Soviet occupation from 1979–1989. Though there was limited involvement of U.S. military forces, this case allows for an evaluation of successful American efforts in proxy warfare. This case also occurred during the competition phase, and it therefore provides lessons that can be applied to the current competitive environment. This case provides particularly relevant insight into future policy in areas where the U.S. does not wish to commit forces, but where it does hope to draw adversaries into their own military quagmires. Additionally, this chapter examines how U.S. support to the Afghan mujahedin during the Cold War could translate well to the more complex problems in places like Syria where the current strategic environment gives the U.S. opportunities to counter its adversaries.

Chapter IV delves into an examination of how one form of irregular warfare, FID, can be used in defensive strategies, as a critical tool for strengthening and defending allies



and partners. The first case study in this chapter looks at the experience of U.S. Army Special Forces in Bolivia during Che Guevara's efforts to create communist insurgencies throughout South America in the 1960s. This case will be assessed as an example of how strengthening the military capabilities of U.S. partners, through the use of FID, protects against potential threats of instability. Though not a state-on-state conflict, this case highlights the use of irregular warfare before the conflict phase. A second case study of the conduct of counterterrorism and counterinsurgency operations in the Philippines after 9/11 will also be analyzed. Like the case study on Bolivia, The U.S. involvement with military operations in the Philippines, specifically against the Abu Sayyaf Group and Moro Liberation Front provides a case to examine the use irregular warfare, through FID, as a means to thwart adversaries in the pre-conflict stage.

Chapter V focuses on the role of irregular warfare in transitions between competition and conflict, arguing that pre-conflict irregular warfare activities not only help the U.S. compete, but also help should conflict escalate. This chapter's first case study assesses the development and employment of the Filipino Resistance of Japanese occupation during World War II. By studying this case, the utility and impact of a resistance and guerrilla activities in a high intensity conflict can be assessed. This case is additionally useful because the resistance and guerrilla infrastructure required to coordinate and conduct operations were developed during the conflict phase, not before. This allows for reasonable speculation that the Filipino resistance movement would have been more effective if American military officers were not developing it amid a Japanese occupation, in a highly restrictive environment. The enhancement of the French Resistance by Jedburgh teams during World War II will also be examined. Similar to the Filipino case, the resistance activities in France were developed after the initiation of conflict. This example highlights difficulty of creating such networks and infrastructure after the fact. Instead, paired with the cases that represent the competition phase discussed above, this case may demonstrate the need for preparatory actions in the competition phase.

In Chapter VI this study will examine the strategic options available to the United States during the competition phase. The case studies were chosen to understand how the United States has been successful in both the competition and conflict phases in the past.

The concepts and elements identified in the case studies will be used to generate strategic options that can influence the competitive phase and prepare for the conflict phase. These options will then be applied to allied nations, competitive spaces and potential quagmire states. Using the principles and strategic options, this research seeks to provide national and strategic level leaders with the ability to influence the competitive environment while shaping potential future high intensity conflict. Such options give the United States the ability to maintain its position of global leadership now while also shaping an advantageous future battlespace.

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## II. GREAT POWER COMPETITION WILL BE CHARACTERIZED BY IRREGULAR CONFLICT

Despite all of the discussion in the national security and defense communities regarding the United States' engagement in interstate strategic competition<sup>21</sup> (more readily known as GPC), there has been little analysis as to how such a competition will play out. Many assume that great powers will fight “great wars,” but recent history suggests otherwise.<sup>22</sup> It is far more likely that irregular warfare will characterize a significant portion of the current era of GPC, given three primary factors: nuclear constraints on escalation, new competitive strategies, and the presence of multiple actors in the competitive space.

First, the world remains in the nuclear age, and the constraints that places on violent escalation will most likely shape and limit the manner in which states compete for influence. Specifically, states will seek to manage their level of violence to prevent uncontrollable escalation much in the same manner that the United States and the Soviet Union did in the wake of the detonation of atomic bombs over Hiroshima and Nagasaki at the conclusion of World War II.<sup>23</sup> As a result, during the Cold War, direct conflict between the United States and the Soviet Union never occurred; instead, each fought small wars or irregular conflicts in pursuit of individual national interests or in an effort to disrupt the other power's achievement of its strategic goals.<sup>24</sup> Despite the diminished public discourse about nuclear threats, nuclear weapons still exist, and the constraints of the Atomic Age

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<sup>21</sup> Trump, “The National Security Strategy of the United States of America.”

<sup>22</sup> Naval War College, “Secretary of Defense Esper Tells U.S. Naval War College Students His Focus Is Great-Power Competition,” posted August 28, 2019, <https://usnwc.edu/News-and-Events/News/Secretary-of-Defense-Esper-Tells-US-Naval-War-College-Students-His-Focus-is-Great-Power-Competition>. In this discussion at the Naval War College, secretary Esper noted that after America's recent experience in irregular warfare, “times have changed.”

<sup>23</sup> Jeremy Suri, “Nuclear Weapons and the Escalation of Global Conflict since 1945,” *International Journal: Canada's Journal of Global Policy Analysis* 63, no. 4 (December 2008): 1016, <https://doi.org/10.1177/002070200806300412>.

<sup>24</sup> Henry A. Kissinger, “Military Policy and Defense of the ‘Grey Areas,’” *Foreign Affairs* 33, no. 3 (1955): 416–28, <https://doi.org/10.2307/20031108>; Jeremy Suri, “Nuclear Weapons and the Escalation of Global Conflict since 1945.”

have not changed. It is probable that this will continue to shape the global competitive space and force the preference of strategies that mitigate the threat of escalation.

Second, adversaries have acknowledged the United States' conventional military dominance since the Cold War, but they have also watched its struggles in facing irregular threats. Since the end of the Cold War, when engaged in a conventional fight, the U.S. has won handily. Such dominance, as in the case of the Gulf War in 1990 and the Invasion of Iraq in 2003, has shaped the competitive strategies of America's adversaries.<sup>25</sup> Having witnessed such proficiency, America's adversaries are not likely to seek force-on-force engagement with the United States militarily. Instead, it is more probable that they will continue to maneuver in areas where the United States has been less successful in defeating irregular forces. Given this disparity in performance, America's competitors have already developed and engaged using tailored irregular strategies such as hybrid warfare, unrestricted warfare, and asymmetric warfare.

Third, the number of global powers now vying for influence has risen since the Cold War, when only two superpowers existed: the U.S. and the Soviet Union. Today, The U.S. competes with Russia and China globally, and regionally with Iran in the Middle East. Given that the Cold War primarily featured irregular war and low-intensity conflict rather than direct confrontation, such activity is likely to increase as more actors wrangle for influence and control in their areas of interest. The first two existing conditions, nuclear constraints and the development of irregular strategies, have already begun to shape and amplify the impact of the now multipolar world. Therefore, due to increasing global complexity and the participation of multiple actors currently employing irregular strategies, there are strong indications that U.S. responses to GPC will require an irregular approach.

#### **A. ATOMIC AMNESIA?**

The United States and the Soviet Union arose from World War II as dominant superpowers, and immediately began competing to extend the influence of their political

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<sup>25</sup> David Kilcullen, *The Dragons and The Snakes*, 18.

systems, but in the background of relations between East and West was the impact of the nuclear age. The United States, having successfully detonated two atomic bombs to end the war in the Pacific, triggered a nuclear arms race that changed the way that the United States and the Soviet Union competed in the post-World War II era.<sup>26</sup> The consequences of military escalation between the two Cold War powers grew more severe. With a single decision, either power could destroy entire cities and kill millions of people, and a reciprocal response would be virtually guaranteed, ensuring devastating costs to both sides. This calculus formed the basis of the theory of mutually assured destruction that influenced engagement and competition between the United States and the Soviet Union during the Cold War. Instead of open confrontation, each sought to protect aligned countries, exert influence on potential partners and weaken states aligned with the enemy.<sup>27</sup>

Specifically, the United States, as advanced in National Security Council Report 68 (NSC-68), adopted a policy of confronting communism wherever it was found or wherever it threatened. The report states that, “A rapid and sustained build-up of the political, economic, and military strength of the free world, and by means of an affirmative program intended to wrest the initiative from the Soviet Union, confront it with convincing evidence of the determination and ability of the free world to frustrate the Kremlin design of a world dominated by its will.”<sup>28</sup>

The policy essentially advocated for competing with the Soviet Union in any manner possible short of war. While this document has been extensively studied and analyzed in the post–Cold War years, it unquestionably recognized the threat of the Soviet Union and preferred a course that confronted the Soviet Union aggressively yet indirectly, rather than through open warfare.<sup>29</sup>

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<sup>26</sup> White House, *NSC-68 United States Objectives and Programs for National Security* (Washington, DC, 1950), <https://fas.org/irp/offdocs/nsc-hst/nsc-68.htm>.

<sup>27</sup> Thomas K. Adams, *U.S. Special Operations Forces in Action: The Challenge of Unconventional Warfare* (New York, NY: Taylor & Francis, 1998), 61.

<sup>28</sup> White House, *NSC-68 United States Objectives and Programs for National Security*.

<sup>29</sup> White House.

While the threat of nuclear war no longer frequents national discussion, the United States, Russia and China all possess nuclear weapons, while Iran and North Korea, among other nations, are actively pursuing them.<sup>30</sup> The atomic age not only remains; it has in fact expanded to include additional players. Therefore, the consequences of war between major powers remain exceedingly high. As such, from a purely pragmatic view, states will likely seek alternative competitive means of achieving their national policy goals, by continuing to develop irregular methods of challenging adversaries and gaining, extending or protecting influence. The consequences of escalation are simply too great for any party to pursue war as a desired outcome of competition. However, while the United States has recognized the new era of global competition, it has almost solely focused on conventional military advancements in preparation.<sup>31</sup> This may be a poor strategy, given the influence of the atomic age and the ongoing efforts of emerging powers to devise their own unique methods of challenging the international order. These actions will likely continue to drive great power activity away from high intensity conflict and instead toward low intensity or irregular warfare.

## **B. AMERICAN TRADITIONAL MILITARY DOMINANCE DRIVES ADVERSARIAL IRREGULAR STRATEGY**

In the post–Cold War world of the 1990s, the United States emerged as the dominant player on the international stage. Its adeptness on the diplomatic stage precipitated its extension of democracy into areas of former Soviet control. Such encroachment, intended by the United States to increase the number of democratic nations

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<sup>30</sup> Hans M. Kristensen and Matt Korda, “Status of World Nuclear Forces,” *Federation Of American Scientists* (blog), September 2020. <https://fas.org/issues/nuclear-weapons/status-world-nuclear-forces/>; Colum Lynch, “Despite U.S. Sanctions, Iran Expands Its Nuclear Stockpile,” *Foreign Policy* (blog), posted May 08, 2020, <https://foreignpolicy.com/2020/05/08/iran-advances-nuclear-program-withdrawal-jcpoa/>; Michelle Nichols, “North Korea Has ‘probably’ Developed Nuclear Devices to Fit Ballistic Missiles, U.N. Report Says,” *Reuters*, August 4, 2020, <https://www.reuters.com/article/us-northkorea-sanctions-un-idUSKCN24Z2PO>.

<sup>31</sup> Graham-Ashley, “CSA Discusses Army’s Growth, Modernization, Readiness during 2-Day Visit to Hood;” David H. Berger, “Notes on Designing the Marine Corps of the Future,” *War on the Rocks*, December 5, 2019, <https://warontherocks.com/2019/12/notes-on-designing-the-marine-corps-of-the-future/>. Ryan Evans et al., “How Is the Air Force Adapting to Great Power Competition?,” June 5, 2019, *WOTR Podcast*, podcast, 31:23, <https://warontherocks.com/2019/06/wotr-podcast-how-is-the-air-force-adapting-to-great-power-competition/>.

and thus reduce the chance of war, threatened Russia significantly. However, the lack of a Russian response indicated its incapacitation. The United States capitalized on the disappearance of Russian military power and demonstrated its traditional military prowess to the rest of the world by quickly and easily defeating Saddam Hussein's Iraqi Army during the Gulf War in 1991. The future aspiring powers, Russia, China and Iran, noted this dominance and resolved to avoid open confrontation with the United States in the traditional military sense. While not modifying their strategic aspirations, these nations realized the need for revised approaches.

Although convinced of the futility of conventional confrontation with the United States through the 1990s, America's competitors witnessed U.S. vulnerabilities in the new millennium. Despite successful early stages of the war in Afghanistan in 2001–2002 and the initial invasion of Iraq in 2003, there were significant ensuing struggles due to growing and violent insurgencies in both countries. Notably, Russia, China and Iran observed the United States falter in the face of a militarily inferior enemy in both Afghanistan and Iraq, where the United States failed to score a convincing victory over irregular enemies. The inadequacies of the strategic application of U.S. traditional military power contributed to important innovations in the competitive strategies on the part of America's chief adversaries. These new strategies included both irregular elements designed to remain below an anticipated threshold for an American response and also included the development of advanced technology that could challenge American dominance. This



technology included nuclear, biological, and chemical weapons as well as anti-access area denial systems and hypersonic missiles.<sup>32</sup>

Further analysis of strategic application of U.S. forces in those wars reveals that the United States is averse to and misunderstands irregular warfare.<sup>33</sup> In Afghanistan, what began as an unconventional warfare operation evolved into a large-scale counterinsurgency. Oddly, as the enemy adopted for unconventional tactics, the United States grew more conventional.<sup>34</sup> By defaulting to a cumbersome military package, the United States fumbled its early success in Afghanistan, and remains there, still limping to a solution. Conversely, in Iraq, the conflict began as a conventional engagement and devolved into the insurgency. Yet the United States struggled to define the problem or create an adaptive solution for several years before gaining a modicum of control following

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<sup>32</sup> Robert Martinage, "Toward a New Offset Strategy: Exploiting U.S. Long-Term Advantages to Restore U.S. Global Power Projection Capability," 2014, <https://csbaonline.org/uploads/documents/Offset-Strategy-Web.pdf>; David Kilcullen, *The Dragons and The Snakes: How the Rest Learned to Fight the West*, 20; Minnie Chan, "China and Russia's Hypersonic Weapons Raise Fears of Arms Race with US," *South China Morning Post*, January 19, 2020, <https://www.scmp.com/news/china/military/article/3046667/china-and-russias-push-develop-hypersonic-weapons-raises-fears>; Frank A. Rose, "Russian and Chinese Nuclear Arsenal: Posture, Proliferation, and the Future of Arms Control," *Brookings* (blog), June 21, 2018, <https://www.brookings.edu/testimonies/russian-and-chinese-nuclear-arsenals-posture-proliferation-and-the-future-of-arms-control/>; Missile Defense Advocacy Alliance, "China's Anti-Access Area Denial," August 24, 2018, <https://missiledefenseadvocacy.org/missile-threat-and-proliferation/todays-missile-threat/china/china-anti-access-area-denial/>; Department of Defense, *Nuclear Posture Review* (Washington, DC: Department of Defense, 2018), <https://media.defense.gov/2018/Feb/02/2001872886/-1/-1/2018-NUCLEAR-POSTURE-REVIEW-FINAL-REPORT.PDF>.

<sup>33</sup> Adams, *U.S. Special Operations Forces in Action*, 86–87. In his chapter referencing the Civilian Irregular Defense Group (CIDG) in Vietnam, Adams argues that early success of irregular programs tended to be negatively influenced later by conventional military leadership.

<sup>34</sup> Hy S. Rothstein, *Afghanistan & The Troubled Future of Unconventional Warfare* (Annapolis, MD: Naval Institute Press, 2006), 14. Rothstein makes the observation that after the fall of the Taliban, when the war dictated the need for a more unconventional approach, the United States actually built large conventional commands and grew more conventional.

the Surge of 2006.<sup>35</sup> During this era of renewed GPC, such glaring weaknesses by the U.S. in the face of irregular threats have influenced its adversaries' preferred approaches and have driven the creation and execution of alternate and irregular strategies. In analyzing their development, three primary adversaries, Russia, China and Iran who have proven adept in implementing their unique irregular strategies, will be analyzed to determine the key aspects of their approaches. Finally, Syria, which is a microcosm of the competitive landscape will be analyzed to demonstrate the vastly greater complexity present in this era of GPC.

### **C. RUSSIA: DEVELOPMENT AND EMPLOYMENT OF HYBRID WARFARE**

The immediate balance of power disparity between American and Russian post-Cold War power can be seen in both the American effort to consolidate former Soviet states into NATO, and the weakening of the Soviet military. At that time, the United States capitalized on Russian weakness and exerted its influence to globally export democracy and establish the liberal international order. By poaching former Soviet states, the United States sought to expand its safety net of democratic nations.<sup>36</sup> To the American policymaker, adding former Soviet states to NATO enhanced U.S. dominance and security;

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<sup>35</sup> International Crisis Group, "In Their Own Words: Reading the Iraqi Insurgency," February 15, 2006, <https://www.crisisgroup.org/middle-east-north-africa/gulf-and-arabian-peninsula/iraq/their-own-words-reading-iraqi-insurgency>; Bruce R. Pirnie and Edward O'Connell, "Counterinsurgency in Iraq (2003-2006)," Rand Corporation, 2008, [https://www.rand.org/content/dam/rand/pubs/monographs/2008/RAND\\_MG595.3.pdf](https://www.rand.org/content/dam/rand/pubs/monographs/2008/RAND_MG595.3.pdf); William A. Knowlton Jr., "The Surge: General Petraeus and the Turnaround in Iraq," (Fort Belvoir, VA: Defense Technical Information Center, December 2010), <https://doi.org/10.21236/ADA577539>; Kenneth M. Pollack, "The Seven Deadly Sins of Failure in Iraq: A Retrospective Analysis of the Reconstruction," *Brookings* (blog), December 1, 2006, <https://www.brookings.edu/articles/the-seven-deadly-sins-of-failure-in-iraq-a-retrospective-analysis-of-the-reconstruction/>.

<sup>36</sup> Glenn Duerr, "Huntington vs. Mearsheimer vs. Fukuyama: Which Post-Cold War Thesis Is Most Accurate?," *E-International Relations*, April 22, 2018, <https://www.e-ir.info/2018/04/22/huntington-vs-mearsheimer-vs-fukuyama-which-post-cold-war-thesis-is-most-accurate/>.

however, to Russia, it was a strategic threat.<sup>37</sup> Notably, the lack of Russian response to American aggression throughout the 1990s indicates its defenselessness in the wake of Cold War defeat, and its preoccupation with internal matters as the Soviet Union transitioned to the Russian Federation. After the fall of the Soviet Union, Russia's military also suffered significantly, as its members returned to the now-fragmented states of the former Soviet Union, and in the wake, Russia retained a large, but empty, military structure with the majority of its billets left unfilled. The corresponding loss of military experience and leadership culminated in the ineffectiveness of Russian forces during the First Chechen War (1994-1996), which provided further evidence of Russia's traditional military decline.<sup>38</sup>

While the Russian military was not in a position to challenge the United States as it sought to sort its post-Cold War existence, in subsequent decades, particularly after the ascension of Russian President Vladimir Putin, Russia endeavored to rebuild its military might. Putin did so through by seeking the modernization of its nuclear arsenal and military while successfully employing a distinctive form of irregular warfare. Since that time, Russia, in recognition of American conventional power, has sought to reassert itself through open, but limited, gradual and low-intensity military maneuvers; this brand of warfare has been dubbed hybrid warfare.<sup>39</sup> Specifically, as the United States strategic focus was fixed on extricating itself from wars in Afghanistan and Iraq, Russia took full advantage to employ its hybrid warfare strategy by annexing Crimea, occupying the Donbas region of the Ukraine in 2014 and intervening in Syria in 2015. During America's

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<sup>37</sup> Igor Zevelev, "NATO's Enlargement and Russian Perceptions of Eurasian Political Frontiers," 2000, <https://www.nato.int/acad/fellow/98-00/zevelev.pdf>; Sophia Dimitrakopoulou and Andrew Liaropoulos, "Russia's National Security Strategy to 2020: A Great Power in the Making?," *Caucasian Review of International Affairs*, January 1, 2010, [https://www.researchgate.net/profile/Andrew\\_Liaropoulos/publication/42253400\\_Russia%27s\\_National\\_Security\\_Strategy\\_to\\_2020\\_A\\_Great\\_Power\\_in\\_the\\_Making/links/53d5f3c10cf228d363ea1439/Russias-National-Security-Strategy-to-2020-A-Great-Power-in-the-Making.pdf](https://www.researchgate.net/profile/Andrew_Liaropoulos/publication/42253400_Russia%27s_National_Security_Strategy_to_2020_A_Great_Power_in_the_Making/links/53d5f3c10cf228d363ea1439/Russias-National-Security-Strategy-to-2020-A-Great-Power-in-the-Making.pdf)

<sup>38</sup> Kilcullen, *The Dragons and The Snakes*, 131–133.

<sup>39</sup> Kilcullen, 137–38; Frank Hoffman, "On Not-So-New Warfare: Political Warfare vs Hybrid Threats," War on the Rocks, July 28, 2014, <https://warontherocks.com/2014/07/on-not-so-new-warfare-political-warfare-vs-hybrid-threats/>. In this essay, Hoffman defines hybrid warfare as "a tailored mix of conventional weapons, irregular tactics, terrorism, and criminal behavior in the same time and battlespace to obtain [a group's] political objectives."

attempted transition from the Middle East, Russia seized an opportunity to challenge the post–Cold War order and reemerged as a global competitor. Russian hybrid warfare proved effective given the combination of a lack of effective response options to irregular threats and an unwillingness to respond with traditional military power. Less overt than a military invasion, Russia instead crept into Crimea, executing a *fait accompli*, employed irregular and regular troops to destabilize the Donbas region, and utilized special operations forces, military contractors, airpower and Syrian proxies to solidify Bashar Al-Assad’s power.

Even more broadly, Russia has employed private corporations, cyber activities, organized crime organization, and information/influence campaigns to “disrupt the cohesion of the West.”<sup>40</sup> By reducing the number of conventional military personnel needed to conduct operations, the Russians have engaged the United States in a manner that falls below direct engagement and exploits the seams of the American national security apparatus.<sup>41</sup> Though Russian actions have influenced American interests, they have remained below the American threshold for a response, and the United States has not had public support for a direct, conventional military response to an event of perceived minimal importance. Moreover, deterrent nuclear weapons are not a credible threat in response to Russian hybrid warfare as Russia has identified a position along the spectrum of conflict where it can operate unimpeded as it attempts to regain parity.<sup>42</sup> Its timing and methods are well-judged, and it has reemerged as a global competitor.<sup>43</sup> However, there is also no indication nor reason to believe that Russia will settle for reemergence. Rather, Russia will likely continue to press its strategic goals, build power, and reject the Western international order not by suddenly seeking traditional military engagement, but by using the same techniques that have already proven successful.

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<sup>40</sup> James Sherr, “The Militarization Of Russian Policy,” *The Transatlantic Academy* 10 (August 2017): 24.

<sup>41</sup> Ivan Arreguin-Toft, “How the Weak Win Wars,” *International Security*, (July 1, 2001): 93–128.

<sup>42</sup> Arreguin-Toft, “How the Weak Win Wars.” 94.

<sup>43</sup> Trump, “The National Security Strategy of the United States of America.”

#### **D. CHINA: CHALLENGING THE U.S. THROUGH UNRESTRICTED WARFARE**

In a manner similar to the Soviet Union, the Chinese viewed the 1991 Gulf War as a stark warning that they were woefully unprepared to battle the technologically advanced U.S. military. The antiquated strategies of massing troops, which the Chinese had preferred in the past and on which the Iraqis had depended to account for technological weakness, had been crushed by the U.S. military. In fact, they concluded that they were vulnerable to attack and would lose such an engagement.<sup>44</sup> This interpretation of events convinced the Chinese that military engagement with the United States should be avoided. In order to ensure this, the Chinese began seeking points of intersection with the United States in the political and economic sectors. In doing so, China made important progress and emerged as a rising power with global influence due to its powerful economic engine.<sup>45</sup>

However, amidst this global rise, China also developed alternative military concepts and strategies in preparation for potential future conflict, while simultaneously advancing its conventional military power. In terms of its traditional military power, China has begun an impressive transformation by, among other improvements, building advanced aircraft carriers, developing an air force, and creating an Anti-Access/Area Denial system of weapons.<sup>46</sup> In tandem, its development of alternative military strategies broadened the concept of warfare by embracing political warfare, information warfare, psychological warfare, and lawfare, the latter of which is defined as the use of legal entanglement to advance position and influence.<sup>47</sup>

Specifically, having reconfirmed that the U.S. had conventional dominance during the initial stages of the 2003 Iraq War, China broadened its concept of military action and

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<sup>44</sup> Kilcullen, *The Dragons and The Snakes*, 25–27.

<sup>45</sup> Dean Cheng, “Chinese Lessons From The Gulf Wars” (Carlisle Barracks, PA: The United States Army War College, November 2011), 153–69.

<sup>46</sup> Department of Defense, *Military and Security Developments Involving the People’s Republic of China 2020* (Washington, DC: Department of Defense, 2020), <https://media.defense.gov/2020/Sep/01/2002488689/-1/-1/1/2020-DOD-CHINA-MILITARY-POWER-REPORT-FINAL.PDF>.

<sup>47</sup> Kilcullen, *The Dragons and The Snakes*, 26; Andrew Scobell et al., eds., *Chinese Lessons from Other Peoples’ Wars* (Carlisle, PA: Strategic Studies Institute, U.S. Army War College, 2011), 153–200.

competition, seeking to negate U.S. advantages. The concept of Unrestricted Warfare, initially introduced by People's Liberation Army Colonels Qiao Liang and Wang Xiangsui, sought to broaden Chinese military strategy by combining multiple elements of Chinese power with a renewed emphasis on military technology and Anti-Access/Area Denial weapons.<sup>48</sup> As the authors argue, the United States, because it has led the global order and set the parameters of warfare, is actually quite vulnerable because its position forces compliance to a certain standard of conduct in order to maintain credibility for the system that has bred American power. Because of this, challengers can exploit the weaknesses of the system in their effort to supplant the United States. Furthering the point, the authors argue that wars should be fought "using all means, including armed force or non-armed force, military and non-military, and lethal and non-lethal means to compel the enemy to accept one's interest."<sup>49</sup> This argument for a broader means of conflict coexists with their argument that the battlefield should not be finite and that war can occur anywhere.<sup>50</sup> Essentially, the Chinese have developed a strategy to circumvent American strengths of conventional military dominance, advanced military technology, and expertise in joint and precision warfare by blurring war with other non-violent modes of competition, all while building a capable and advanced conventional military.<sup>51</sup>

In practice, China challenges the status quo through more subtle actions in accordance with the concept of unrestricted warfare.<sup>52</sup> In the South China Sea, China has sought to extend its territorial waters and the associated Economic Exclusion Zone by building runways in the Spratly Islands. Additionally, it has laid claim to virtually the entire South China Sea by virtue of an historical map deemed illegitimate by international observers. It has also patrolled the area with law enforcement vessels, often harassing U.S.

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<sup>48</sup> Qiao Liang and Wang Xiangsui, *Unrestricted Warfare* (Beijing, China: PLA Literature and Arts Publishing House, 1999).

<sup>49</sup> Qiao Liang and Wang Xiangsui, 7.

<sup>50</sup> Tony Corn, "Peaceful Rise through Unrestricted Warfare: Grand Strategy with Chinese Characteristics," *Small Wars Journal*, June 5, 2010, <https://smallwarsjournal.com/jrnl/art/grand-strategy-with-chinese-characteristics>. <https://smallwarsjournal.com/jrnl/art/grand-strategy-with-chinese-characteristics>

<sup>51</sup> Kilcullen, *The Dragons and The Snakes*, 202.

<sup>52</sup> Corn, "Peaceful Rise through Unrestricted Warfare: Grand Strategy with Chinese Characteristics."

Navy ships passing through international waters, in an effort to reinforce its claim.<sup>53</sup> Finally, China has employed aggressive and predatory economic practices through its global investment plan, the “Belt and Road Initiative.” Many have raised concerns that Chinese investment will ultimately amount to a “debt trap” meant to cement Chinese influence across the globe.<sup>54</sup> The uncertainty surrounding Chinese activity provides an example of its ability and active efforts to pursue its goals without raising the specter of conflict. Given the progress and extension of its influence over the past 20 years, China, despite building a powerful military,<sup>55</sup> is more likely to pursue its goals in accordance with unrestricted warfare so long as that approach proves successful and continues to go relatively unchallenged.

#### **E. IRAN: ASYMMETRIC WARFARE THROUGH PROXIES**

Also observing the Gulf War, Iran, having only three years earlier lost a lengthy and brutal war with the same Iraqi military, understood most pointedly the need to avoid conflict with the United States.<sup>56</sup> The wide disparity in performance against Iraq drove Iran toward irregular strategies in pursuit of its strategic goals: regional influence and the removal of the United States from the Middle East. To do this, Iran intensified its nuclear program while sowing influence through the development of an asymmetric strategy built on the cultivation of regional proxies.<sup>57</sup> Using those proxies, Iran developed its own effective brand of irregular warfare in the Middle East – one of disruptive and

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<sup>53</sup> Michael J. Mazarr, “Mastering the Gray Zone,” December 1, 2015, 79–89; Michael O’Hanlon, “China, the Gray Zone, and Contingency Planning at the Department of Defense and Beyond,” *GLOBAL CHINA*, September 30, 2019, 2–3.

<sup>54</sup> Elaine Deaenski, “Below the Belt and Road,” FDD, May 6, 2020, <https://www.fdd.org/analysis/2020/05/04/below-the-belt-and-road/>; Mark Green, “China’s Debt Diplomacy,” *Foreign Policy* (blog), April 25, 2019, <https://foreignpolicy.com/2019/04/25/chinas-debt-diplomacy/>; Ronak Golpadas, “Lessons from Sri Lanka on China’s ‘Debt-Trap Diplomacy,’” ISS Africa, February 21, 2018, <https://issafrica.org/amp/iss-today/lessons-from-sri-lanka-on-chinas-debt-trap-diplomacy>.

<sup>55</sup> Department of Defense, *Military and Security Developments Involving the People’s Republic of China 2020*.

<sup>56</sup> Joseph Kostiner, *Conflict and Cooperation in the Gulf Region* (Weisbaden, Germany: VS Verlag für Sozialwissenschaften, 2009), 175, <https://doi.org/10.1007/978-3-531-91337-7>.

<sup>57</sup> Kilcullen, *The Dragons and The Snakes*, 29–30.

unattributable attacks intended to impose a significant enough cost on the United States to force it to abandon the region.<sup>58</sup>

Iran's extensive network of proxy forces creates and capitalizes on instability to overcome its disadvantage within the traditional elements of national power. Although Iran's nuclear program, conventional military capabilities, domestic politics and cyber activities play important roles in Iranian strategy and behavior, its use of irregular warfare through the Iranian Revolutionary Guards Corps (IRGC), especially its foreign and covert component, the Quds Force (QF), and its network of proxies and militias, has been the primary tool used to impose heavy costs on the United States for its presence in the Middle East. Through the Quds Force, which is a highly selective and secretive wing of the IRGC.<sup>59</sup> Iran has extended its regional reach through its relationships with groups like Hamas in the Gaza Strip, Hezbollah and the Palestinian Islamic Jihad in Lebanon, the Badr Corps in Iraq, the National Defense Forces in Syria, and the Houthis in Yemen.<sup>60</sup>

In practice, Iran uses these militias to destabilize unfriendly regimes to facilitate conditions more conducive to Iranian influence.<sup>61</sup> This directly challenged the United States during the American occupation of Iraq from 2003–2011, when Iran's Quds Force-sponsored surrogates attacked American interests and sparked violent ethnic conflict to increase Iranian-sponsored Shia influence in the Iraqi government.<sup>62</sup> Iran effectively subverted the American efforts.<sup>63</sup> The United States ultimately withdrew all military forces

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<sup>58</sup> Anthony H Cordesman, "Capability for Asymmetric Warfare," Rand, January 10, 2020, [https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/200113\\_GULF\\_MILITARY\\_BALANCE.pdf?](https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/200113_GULF_MILITARY_BALANCE.pdf?)

<sup>59</sup> Council on Foreign Relations, "Iran's Revolutionary Guards," May 6, 2019, <https://www.cfr.org/backgrounder/irans-revolutionary-guards>; Afshon Ostovar, *Vanguard of the Imam: Religion, Politics, and Iran's Revolutionary Guards* (New York, NY: Oxford University Press, 2016), 6.

<sup>60</sup> Afshon Ostovar, "The Grand Strategy of Militant Clients: Iran's Way of War," *Security Studies*, October 17, 2018, 20, <https://doi.org/10.1080/09636412.2018.1508862>.

<sup>61</sup> William Branigin, "Iran's Quds Force Was Blamed for Attacks on U.S. Troops in Iraq," *Washington Post*, October 11, 2011. [https://www.washingtonpost.com/world/national-security/irans-quds-force-was-blamed-for-attacks-on-us-troops-in-iraq/2011/10/11/gIQAPqvOdL\\_story.html](https://www.washingtonpost.com/world/national-security/irans-quds-force-was-blamed-for-attacks-on-us-troops-in-iraq/2011/10/11/gIQAPqvOdL_story.html).

<sup>62</sup> Tim Arango et al., "The Iran Cables: Secret Documents Show How Tehran Wields Power in Iraq," *The New York Times*, November 18, 2019. <https://www.nytimes.com/interactive/2019/11/18/world/middleeast/iran-iraq-spy-cables.html>.

<sup>63</sup> Ostovar, "The Grand Strategy of Militant Clients," 4.



from Iraq by 2011, clearing the path for Iran to establish a proxy government in Baghdad.<sup>64</sup> Until recently, little could be done in Iraq without Iranian permission.<sup>65</sup>

Conversely, where it already has a foothold of influence, Iran used the IRGC and the Quds Force to work for stability to entrench its institutions.<sup>66</sup> This also occurred in Iraq following the U.S. withdrawal in 2011, when Iran's Popular Mobilization Forces (PMF) proxies transitioned into officially recognized Iraqi military units, the PMF, executing military operations at the orders of Iraq and the behest of Iran.<sup>67</sup> Entrenched in the Iraqi military, they have been involved in counter-ISIS operations and, in 2016, seized Rutbah and the al Waleed border crossing with Syria, simultaneously establishing an, albeit contested, contiguous route from Iran to Lebanon.<sup>68</sup> Additionally, according to recently leaked Iranian intelligence documents, Iran quickly supplanted the United States as the arbiter of Iraqi affairs.<sup>69</sup> For this reason, during the 2019 protests that led to the resignation of Iran-affiliated Prime Minister Adel Abdul Mahdi, Iran sought to reinforce his position by sending Quds Force Commander Qassem Soleimani to shore up support for the Iranian-backed leader.<sup>70</sup> When Soleimani's presence failed to bolster Mahdi's position and quell the protests, Iran violently suppressed them through its proxies.<sup>71</sup>

These contrasting illustrations of Iraq's efforts demonstrate Iran's effective asymmetric strategy of using proxy forces to impose costs on and destabilize unfriendly countries and to assert influence upon and stabilize friendly countries. Iran has successfully attained outsized influence across the region and likely sees the continued extrication of

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<sup>64</sup> James Risen et al., "Leaked Iranian Intelligence Reports Expose Tehran's Vast Web of Influence in Iraq," *The Intercept*, posted November 18, 2019, <https://theintercept.com/2019/11/18/iran-iraq-spy-cables/>.

<sup>65</sup> Arango et al., "The Iran Cables."

<sup>66</sup> Risen et al., "Leaked Iranian Intelligence Reports Expose Tehran's Vast Web of Influence in Iraq."

<sup>67</sup> Ostovar, "The Grand Strategy of Militant Clients: Iran's Way of War," 20.

<sup>68</sup> Author's personal experience during Operation Inherent Resolve

<sup>69</sup> Arango et al., "The Iran Cables."

<sup>70</sup> Shafaq News, "Report: Qasim Soleimani Fails to End Protests in Iraq despite His Orders to Suppress Them," October 31, 2019, <https://shafaq.com/en/iraq-news/report-qasim-soleimani-fails-to-end-protests-in-iraq-despite-his-orders-to-suppress-them>.

<sup>71</sup> James Risen, "U.S. Sanctions Are Driving Iran to Tighten Its Grip on Iraq," *The Intercept*, December 10, 2019, <https://theintercept.com/2019/12/10/sanctions-iran-iraq-protests/>.

U.S. forces as further evidence of success.<sup>72</sup> Given Iran’s positive perception of its position in the Middle East, it is again unlikely that Iran will change course away from this successful strategy and instead seek traditional military conflict with the United States.

## **F. THE U.S. AND SYRIA**

In no place is the complexity and prevalence of irregular warfare more evident than in Syria, where Russia and Iran combined to stabilize the Assad regime and preserve an important Middle East ally. Because of Syria’s importance, Iran quickly intervened with support across the full spectrum of the elements of national power, but its most significant contribution came in the form of military advisors and the provision of paramilitary forces to bolster the fractured Syrian Arab Army.<sup>73</sup> The Quds Force worked in conjunction with transplanted elements of Lebanese Hezbollah to advise, assist and accompany Syrian forces.<sup>74</sup> As the Assad regime grew more imperiled, Iran further increased its support and involvement. Iranian forces, including conventional forces, flooded into Syria to quickly steady the Assad Regime.<sup>75</sup>

Still, in September of 2015, the conflict was fundamentally transformed when Russia began air strikes on Syrian rebel forces, relieving pressure on Iranian-backed militia and Syria Army forces. Russian air power and the freedom of maneuver it created for pro-regime ground forces generated momentum in Assad’s battle against the Syrian opposition. With the addition of Russian air power and advisors, the Syrian regime solidified its hold on Damascus and gradually expanded its span of control, and in 2016, the regime recaptured Aleppo. This proved to be a turning point that allowed pro-regime forces to relocate to other areas of Syria. Then, in 2017, a series of de-escalation zones, established

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<sup>72</sup> BBC News, “US to Withdraw 2,200 Troops from Iraq by End of September,” September 09, 2020, <https://www.bbc.com/news/world-middle-east-54085129>.

<sup>73</sup> Afshon Ostovar, *Vanguard of the Imam*, 208–9.

<sup>74</sup> YouTube, *Iran’s Secret Army*, November 22, 2013. [https://www.youtube.com/watch?v=ZI\\_88ChjQtU](https://www.youtube.com/watch?v=ZI_88ChjQtU). This video, captured and released by Syrian rebels, chronicles one IRGC unit’s experience in Syria. It has been used to demonstrate the level of involvement of Iranian forces in Syria, including their involvement in combat operations; Afshon Ostovar, *Vanguard of the Imam*, 209–11.

<sup>75</sup> Claire Graja and Mike Connell, “Iranian Action in Syria: Military Operations, Soft Power Influence, and Implications for the United States” (CNA: National Security Seminar, Arlington, VA: CNA, 2019), 2.

with Russian assistance to facilitate a peace process, allowed pro-regime forces to relax efforts in southwestern Syria and refocus on capturing other portions of Syria, including Eastern Syria, which was controlled by the Islamic State. This move ultimately did contribute to the defeat of the Islamic State, as the de-escalation zones permitted the needed concentration of forces required to reassert authority over a substantial portion of Syria.<sup>76</sup>

Though the importance of Syria to the United States can be debated, what cannot be is the complexity of military operations in the country given the actions of Russia, Iran, and their proxies. Their activities solidified their hold on strategic interests and fundamentally reshaped American policy in Syria, ultimately forcing the United States to abandon any form of strategic regime change there.<sup>77</sup>

This specific example is a good indicator of how GPC will proceed, with multiple nations competing for global and regional influence. Again, successful irregular campaigns by adversaries will breed more attempts at achieving national interests and shaping the policy of the United States. As complex as the Cold War had been, this new era of GPC promises to be exponentially more complicated.

#### **G. CONCLUSION: MULTIPLE ACTORS EMPLOYING IRREGULAR WARFARE IMPLIES THE IMPORTANCE OF AMERICA'S IRREGULAR CAPABILITIES**

As described above, the performance of the United States in traditional warfare using conventional forces has been recognized by other global powers, and despite their sustained efforts in modernizing and advancing their own militaries, it is unlikely that America's peer competitors will intentionally enter into or provoke open war with the United States. Instead, America's proven conventional military strength and its troubles in irregular conflicts of late has driven its great power adversaries to develop their own versions of irregular war (hybrid warfare, unrestricted warfare, and asymmetric warfare).

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<sup>76</sup> Atlantic Council, "Military Strategy - Breaking Ghouta," January 2018. <https://www.publications.atlanticcouncil.org/breakingghouta/military-strategy/>.

<sup>77</sup> Greg Jaffe and Adam Entous, "Trump Ends Covert CIA Program to Arm Anti-Assad Rebels in Syria, a Move Sought by Moscow," *Washington Post*, July 19, 2017. [https://www.washingtonpost.com/world/national-security/trump-ends-covert-cia-program-to-arm-anti-assad-rebels-in-syria-a-move-sought-by-moscow/2017/07/19/b6821a62-6beb-11e7-96ab-5f38140b38cc\\_story.html](https://www.washingtonpost.com/world/national-security/trump-ends-covert-cia-program-to-arm-anti-assad-rebels-in-syria-a-move-sought-by-moscow/2017/07/19/b6821a62-6beb-11e7-96ab-5f38140b38cc_story.html).

Though distinct, the core of these strategies lies in their attempt to sidestep American strength and compete in areas where the United States struggles to find appropriate responses. These activities have already begun, and in a multipolar competitive space, they are likely to continue until effectively countered.

Other great powers have also individually recognized opportunities to advance using irregular warfare, and as long as such action continues to succeed, there is a high probability that it will continue. With every success, the world will grow more complex, with actors and their state sponsors increasingly maneuvering to achieve their goals and secure their interests around the globe. Given the deftness of the application of these irregular strategies, it would be inappropriate for the United States to rely on its conventional military prowess to quell these limited actions. First of all, the breadth of activity does not permit traditional confrontation in each case. The size and cost of conventional military deployments place constraints on when, where and why the military is used. Besides, at present, the United States displays an aversion to troop commitments of even the smallest scale, so it is unlikely that it would choose to do so in the near future.<sup>78</sup> Second, even if the military did engage a particular enemy, the commitment of forces would only provide opportunities for further irregular actions on the periphery of or altogether outside of the major theater of war by countries seeking to capitalize on America's mobilized status.

To conclude, America's influence, and its attendant liberal international order, are being challenged, not through a traditional military build-up, but through unique versions of irregular warfare that are shaping the competitive environment. Unlike the Cold War, the challenge to American influence has been launched from multiple actors who, understanding the nuclear implications of escalation and recognizing the traditional military dominance of the United States, prefer alternative techniques to chisel away American prestige and reputation internationally. These efforts are achieving notably

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<sup>78</sup> William Ruger, "Why Americans Want a President Who Ends Endless Wars," (blog), *The National Interest* (The Center for the National Interest, August 17, 2020), <https://nationalinterest.org/blog/skeptics/why-americans-want-president-who-ends-endless-wars-167041>. Though this tends to remain a political issue, the numbers articulated in this poll suggest a desire to curtail troop deployments.

strategic results, and they are unlikely to cease, even if total war breaks out. Therefore, as the United States determines when and where to counter its various competitors it will be critical that irregular responses be appropriately considered. How can the United States impose costs on its adversaries for their adventurism? How can the United States shore up its areas of influence? Although the overall strategy must be broad and all-encompassing, an American brand of irregular warfare can play a critical role in the areas where the United States chooses to compete.

### **III. ON IMPOSING COSTS: CREATING WICKED PROBLEMS THROUGH IRREGULAR WARFARE**

Although the global challenges presented by Russia, China, and Iran, and the reemphasis on GPC have raised concerns for the United States, the reemergence of global challengers presents opportunities not found in the American-dominated unipolar order. Despite developing effective irregular methods of challenging the United States, as discussed in Chapter II, the aspiring powers have ambitions that, while driving those nations for greater status and achievement on the world stage, are also a great liability. Regardless of the ways that those aspiring powers challenge the United States, eventually, as is being seen in Syria, those countries will have to commit to their own interests. Though irregular in their approaches, that countries have demonstrated a willingness to invest in their treasure, military equipment, and the lives of their soldiers should be taken as a signal of national interest. It is this commitment that makes the aspiring powers vulnerable, and it is this vulnerability where the United States, through irregular warfare, could seek to impose costs in areas where it would otherwise be unwilling to dedicate forces.

At the end of the Cold War, the United States stepped into the role, whether intentional or otherwise, of the “world’s policeman,” a term applied to signify that global problems needed to be managed by the lone superpower in order to maintain a world moderated by the values of the liberal international order.<sup>79</sup> While there are examples of places where the United States failed to act in this manner, in most others, it did. However, with aspiring powers seeking to regain influence, the United States can be more measured in its approach. In fact, it has the opportunity, with minimal investment through an irregular approach, to impose considerable costs on its great power adversaries. These approaches should be reserved for areas where the interests of America’s competitors make them vulnerable but where the United States has no interest in gaining, solidifying or expanding its own influence. Currently, this approach could apply to areas like Syria, a place where a

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<sup>79</sup> Wendy McElroy, “How America Became the World’s Policeman,” The Independent Institute, posted March 20, 2015, <https://www.independent.org/news/article.asp?id=6336>; “Must We Be the World’s Policeman?,” *The New York Times*, May 3, 1964. <https://www.nytimes.com/1964/05/03/archives/must-we-be-the-worlds-policeman.html>.

litany of problems remains, and the United States has no desire to commit, although its adversaries do. By executing a strategy relying on an irregular approach, the United States would seek to impose costs by creating a tangled series of problems for the aspiring power with the goal of fashioning a disruptive foreign policy quagmire for that adversary. These approaches have been tried before and have succeeded in generating wicked problems for America's adversaries that significantly influenced the course of history, for example, in Afghanistan under Soviet occupation in the 1980s. Furthermore, to maximize the impact of this irregular approach, other elements of the craft must be applied, such as psychological warfare, economic warfare, cyber capabilities, information operations, subversion, etc. This will aid in effectively producing conditions, or wicked problems, that eventually overwhelm America's adversaries, ultimately contributing to the preservation of the free and open international order preferred by the United States and its allies. To illustrate the potential for the United States to create wicked problems for its adversaries, American covert activities in Afghanistan to support the mujahedin will be analyzed and the limited objectives of that operation will be applied to potential operations to disrupt Russia and Iran in modern day Syria. These cases combine to demonstrate that, through irregular warfare, the American irregular warriors should be used to create problems that block or disrupt the its adversaries from achieving their national strategic objectives.

**A. WHAT IS A WICKED PROBLEM AND HOW CAN IRREGULAR WARFARE CREATE ONE?**

A wicked problem is a system of interrelated conditions that contribute to a broad dilemma. The core problem exists as its own network of conditions, making it difficult to define, characterize, and solve. The reason for this is that a solution to one of those conditions affects, often negatively, the others in unforeseen or unpredictable ways. Therefore, every effort to solve the problem at hand in turn creates additional issues that generate consistently negative outcomes. While wicked problems are typically discussed in an effort to create a solution, irregular warfare planners, who are seeking to impose costs on America's adversaries, should rather consider how to create wicked problems for America's chief competitors.

Wicked problems have plagued America in contemporary history as they have largely failed to be solved. The re-emergence of other nations seeking to exercise control abroad means that others will now have to confront the problems in their desired spheres of influence. It is this condition that irregular warfare can capitalize upon by amplifying the difficult conditions in certain countries to produce a set of problems in one place that ultimately prevent the advancement of an adversarial global order. In the current great power era, irregular warfare can serve to create wicked problems that impose considerable costs and present obstacles to the achievement of national goals and interests for U.S. adversaries.

To accomplish this, irregular warfare practitioners can adopt a comprehensive approach of costs imposition that creates a more nuanced problem than simply an enemy to be fought. Instead, in this form of costs imposition, elements of warfare like deception, psychological warfare, information operations, sabotage, and subversion can be layered to create a network of problems that hinder success and, as a byproduct of frequent foreign policy struggles, create additional issues domestically. America's irregular warfare experts frequently subdivide capabilities, even within the same command or task force, rather than applying them in an equal manner. In order to achieve a truly networked and comprehensive approach, these capabilities would need to be considered equally. For instance, an attack on an aspiring power without an accompanying narrative to shape public perception simply creates targets to be attacked. However, if such an attack simultaneously were combined with a narrative that produced public animosity, negative economic consequences and an international legal challenge, the consequences extend beyond borders and creates additional problems. An approach that creates opportunities for the cascading of conditions and circumstances in a given nation or region both minimizes American exposure and maximizes costs on its adversaries.

From a broad perspective, the United States did this effectively during the Cold War, when it shaped the global perception of communism and used all of its capabilities to defeat the Soviet Union. In accordance with the policy of containment, which engendered constant competition, the United States applied concepts of irregular warfare in distinct ways. In areas where simply imposing costs served the national strategy, an appropriate



package of practitioners employed all resources at its disposal to hamper Soviet expansions, draw the Soviets into disadvantageous competition and manipulate the Soviet Union into a vulnerable position.<sup>80</sup>

Should this approach then be applied in multiple select locations, a swarming effect could be achieved. That is to say, the use of irregular warfare to impose costs and create problems in the right locations globally can force America's adversaries to respond to a plethora of difficult issues in many locations. Such an effect would be difficult for even the most expert nations to confront and solve. An aspiring power, especially one with a floundering economy, like Iran or Russia, or one with minimal patience for issues that drain economic power, like China, would likely struggle to respond effectively to such an onslaught. Success in effectively harassing adversaries in a handful of locations would likely shape the competitive space in the favor of the United States, allowing for the preservation of a free and open international order. Having established the theoretical concept of creating wicked problems to disrupt adversaries, the following historical example of the United States opposing the Soviet Union in Afghanistan in the 1980s demonstrates that this concept has been used before and that it has been effective.

## **B. THE UNITED STATES AND THE SOVIET UNION IN AFGHANISTAN (1979–1989)**

After Afghanistan adopted a communist regime in the late 1970s, President Jimmy Carter signed a presidential directive, on 3 July 1979, to provide non-lethal aid to the mujahedin, Afghan “freedom fighters” who opposed the regime of communist leader Hafizullah Amin. Later that year, in December of 1979, as Amin's government appeared on the brink of collapse, the Soviet Union invaded and installed its preferred leader, Barbak Karmal. In response to the Soviet aggression in Afghanistan, President Carter expanded and increased aid to the mujahedin to include weapons that would be delivered to the mujahedin through the Pakistani Inter-Services Intelligence (ISI).<sup>81</sup>

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<sup>80</sup> John Lewis Gaddis, *The Cold War: A New History* (New York, NY: Penguin Press, 2005), 261–64.

<sup>81</sup> Steve Coll, “Anatomy of a Victory: CIA'S Covert Afghan War,” *Washington Post*, July 19, 1992, <https://www.washingtonpost.com/archive/politics/1992/07/19/anatomy-of-a-victory-cias-covert-afghan-war/1bd10b14-a0cc-441c-99cc-d2b5d1ba6e2d/>.

As the Soviets grew increasingly bogged down in Afghanistan, they developed an effective tactic of helicopter-borne assaults on Afghan mujahedin positions and supply lines.<sup>82</sup> Having success in this tactic, the Soviets grew to depend on these assault tactics as they sought to turn the tide of the war. The Kremlin, sensing the potential for excessive toil, pushed for decisive action to quickly win the war amid increasing fears of a stalled and floundering foreign action in Afghanistan. According to intelligence reports, the leadership in the Soviet Union intended to expand military action in Afghanistan, continuing to depend on the use of the helicopter, in an effort to bring Afghanistan under control within two years. This clear declaration of Afghanistan as a major Soviet interest presented the United States with additional opportunities to impose costs on the Soviets.<sup>83</sup>

In 1985, President Ronald Reagan responded to the impending Soviet offensive by greatly expanding the covert action program in keeping with his policy of aiding anti-Soviet resistance movements around the world. The Soviets' offensive in Afghanistan increased their direct involvement there, especially in the use of Soviet helicopters and special operations forces like the Spetsnaz. The helicopter assaults on mujahedin positions, which had proven effective in the preceding years, were perpetuated in an attempt to bring the war rapidly to a conclusion. This intelligence, coupled with Reagan's promise of support to anti-communist movements globally, prompted a greatly expanded covert action program aimed at imposing further costs against the Soviets and embroiling them in their own foreign quagmire.<sup>84</sup>

In this expansion of the covert action program, the costs imposition aspect of irregular warfare truly became evident. The expanded authorizations allowed the sharing of intelligence, additional training, and the provision of additional weapons and ammunition, including weapons with advanced technology. Combined with the intelligence produced by the U.S. Central Intelligence Agency, the mujahedin greatly

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<sup>82</sup> Lester W. Grau, ed., *The Bear Went Over The Mountain: Soviet Combat Tactics in Afghanistan* (Washington, DC: National Defense University Press, 1996), 77–105.

<sup>83</sup> Coll, "Anatomy of a Victory."

<sup>84</sup> William J. Daugherty, *Executive Secrets: Covert Action and the Presidency* (Lexington, KY: University Press of Kentucky, 2004), 206; Coll, "Anatomy of a Victory."

increased their battlefield effectiveness through the use of plastic explosives for sabotage, guerrilla-style raids and ambushes, long-range precision rifles, mortars, and anti-tank guided missiles.<sup>85</sup> Additionally, and most significantly, the United States authorized the distribution of Stinger missiles to the Afghan mujahedin in an effort to combat the effectiveness of the Soviet helicopter assaults. No longer able to assault Afghan positions with impunity, the Russians began losing aircraft and soldiers rapidly in Afghanistan. However, as the Soviets' situation in Afghanistan deteriorated, they continued to pour in money and resources in an attempt to control the problem. The U.S. irregular warfare program in Afghanistan would impose significant costs throughout the 1980s until the Soviets withdrew in failure in 1989.<sup>86</sup>

Although the Stinger missile is widely regarded as the most important aspect of U.S. support to the mujahedin in the 1980s,<sup>87</sup> the irregular warfare approach in its totality was well-conceived, involved minimal U.S. manpower, sought limited goals of “harassing the Soviet Union,” and combined the American capabilities of intelligence, technology, advisors, diplomacy, and finance into a very small, scalable campaign.<sup>88</sup> This approach proved successful in imposing costs on the Soviet Union and shaping the global competitive space of the Cold War.<sup>89</sup> It stands as one version of the irregular warfare approach that seeks to impose costs on America's great power adversaries. Adopting such an approach in the right circumstance can shape the new era of GPC, just as it did during the Cold War.

### **C. OPPORTUNITIES IN SYRIA**

Syria, Russia, and Iran, have signaled their interest in maintaining the status quo regime of Bashar al-Assad. The amount of resources and level of effort expended, primarily by Russia and Iran, indicates their desire to assert control over important states and regions.

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<sup>85</sup> Grau, *The Bear Went Over The Mountain*, 197–208.

<sup>86</sup> Coll, “Anatomy of a Victory.”

<sup>87</sup> Daugherty, *Executive Secrets*, 206.

<sup>88</sup> Coll, “Anatomy of a Victory.”

<sup>89</sup> Daugherty, *Executive Secrets*, 206.

Given the residual and deeply problematic conditions that spawned Syria's now fizzling civil war, this presents the United States with an opportunity to impose costs and create problems for its adversaries. Because Russia and Iran have stepped forward in Syria, they are now responsible for its stability and reconstruction, and have shown through prior commitments that a friendly Syria remains in their national interests.<sup>90</sup>

The United States, should it choose to engage in GPC in the Syrian theater, has ample opportunity for countering Russia, Iran and its network, and China, should the Chinese decide to commit resources to the reconstruction effort. The exploration of these options is worthwhile because the United States will pursue competition in other arenas and these solutions, even if not enacted in Syria, can be applied in a modified fashion elsewhere.

Before laying out the opportunities, it is important to revisit and differentiate the versions of GPC that the United States would pursue versus those being executed by Iran and Russia. In Syria, Iran and Russia, as shown through their engagement in the Syrian Civil War, would each be attempting to expand its influence in Syria in order to improve its position in the Middle East. Conversely, as evidenced by troop withdrawals and statements by the Trump Administration of an aversion to remaining in Syria. The United States would be attempting to impose costs on Iran, and potentially Russia to weaken their influence in the Middle East, without escalating to open warfare.<sup>91</sup> When possible, the United States would be positioning irregular forces that could engage in direct conflict with its enemies should escalation to direct conflict occur. Meanwhile, Iran, using its proxy-centric brand of irregular warfare, is attempting to expand and maintain its influence in

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<sup>90</sup> George Baghdadi, "Russia Vows to Help Syria 'Break through' Crippling U.S. Sanctions," CBS News, September 9, 2020, <https://www.cbsnews.com/news/russia-vows-to-help-syria-break-through-united-states-sanctions-as-war-wrecks-syrian-economy/>; Matthew Robinson, "Syria: Russia Vows to Rebuild Nation in Chilling Post-WW2 East Germany Comparison," July 26, 2018, <https://www.express.co.uk/news/world/994406/Syrian-civil-war-Russia-Kremlin-Mikhail-Mizintsev-reconstruction-WW2-Germany>; The International News, "Iranian Defence Minister Vows to Help Rebuild Syria," August 27, 2018, <https://www.thenews.com.pk/print/359814-iranian-defence-minister-vows-to-help-rebuild-syria>.

<sup>91</sup> Richard Hall, "Trump Says Syria Is 'Sand and Death,'" The Independent, January 3, 2019, <https://www.independent.co.uk/news/world/middle-east/trump-syria-troop-withdrawal-us-sand-death-cabinet-meeting-military-a8709131.html>.

Syria, which is one of its national strategic goal. The United States, for its part, would be executing the version of irregular warfare that seeks to impose costs on Iran by preventing Iranian influence in Syria with minimal exposure. The American strategic goals in this instance would be disrupting Iranian support to its proxy network and preventing Iran from directly threatening Israel, potentially preventing a broader and more open war in the Middle East. Additionally, it would be to harass Russia as it attempts to stabilize Syria, maintain a reliable ally, and preserve access to the warm water port in Tartus. With the relative versions of GPC and irregular warfare appropriately prescribed, a more thorough consideration of America's options can be considered.

Should the United States choose competition in Syria, it has the opportunity to stoke and support a ready insurgency in various regions of the country and develop a narrative of Iranian and Russian support for a ruthless dictator who gasses his own citizens. As demonstrated by the fervor of support for Vetted Syrian Opposition, who demonstrated a willingness to attack pro-regime forces in southern Syria in 2017,<sup>92</sup> the desire for continued resistance to Assad's rule persists in spite of the devastation of the nearly decade-long civil war. The brutality of Assad's campaign to retain power has not been forgotten and certainly concerns the Syrian people in areas where Assad regains control. This sentiment has likely only been perpetuated by the presence of the IRGC and its Shia militia groups throughout the conflict. Even though the IRGC emphasized that the fight in Syria was not against Sunnis but for Syria, the Syrian people clearly interpreted the events as an affront to the Sunni portion of Syria and an attempted Shia/Alawite consolidation of power.<sup>93</sup>

In addition, a February 2020 report by the United Nations Office for the Coordination of Humanitarian Affairs, estimates over 800,000 Syrians have been displaced

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<sup>92</sup> Adrian Rankine-Galloway, "Department of Defense Press Briefing by Colonel Dillon via Teleconference from Baghdad, Iraq," U.S. Central Command, July 27, 2017, <https://www.inherentresolve.mil/Releases/News-Releases/Article/1262201/departments-of-defense-press-briefing-by-colonel-dillon-via-teleconference-from/>.

<sup>93</sup> Ostovar, *Vanguard of the Imam*, 218–19.

since the beginning of December 2019.<sup>94</sup> The still deepening internally displaced persons crisis further raises the likelihood of increased insurgent activity as the Syrian government and its backers are unlikely to adequately care for and support this population. Despite common acceptance that the regime would inevitably regain control of the country and retain power, insurgent attacks in the early months of 2020 in Dara'a,<sup>95</sup> Damascus<sup>96</sup> and Rif Damascus against both Russian and Iranian forces shows signs that the insurgency and associated instability are likely to continue.<sup>97</sup> The limits of pro-regime forces are being demonstrated by the slow progress against al-Qaeda associated groups in Idlib.<sup>98</sup> Finally, the regime continues to struggle to fill the vacuum left by the withdrawal of the majority of U.S. troops. In that area, Russian forces and the remnants of the American military frequently impede each other's basic transportation efforts.<sup>99</sup> Simultaneously, pro-regime, Turkish and Kurdish fighters all struggle for the upper hand, with Turkey showing a

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<sup>94</sup> United Nations Office for the Coordination of Humanitarian Affairs, *Syrian Arab Republic: Recent Developments in Northwest Syria* (New York, NY: United Nations Office for the Coordination of Humanitarian Affairs, 2020), [https://reliefweb.int/sites/reliefweb.int/files/resources/nws\\_sitrep8\\_20200213.pdf](https://reliefweb.int/sites/reliefweb.int/files/resources/nws_sitrep8_20200213.pdf).

<sup>95</sup> "The View from U.S. CENTCOM - YouTube," posted January 29, 2020, <https://www.youtube.com/embed/zfFqyfYlyvM?autoplay=1&showinfo=0&autoplay=1&rel=0&wmode=transparent>. General Votel's comments on the deteriorating situation in Syria begin at 12:00 with specific remarks on increase in attack in Dara'a beginning at 12:43. Of note, Iran remains a constantly addressed theme throughout his remarks.

<sup>96</sup> Step News Agency, "A Car Bomb exploded in the Mazzeh neighborhood of the Syrian Capital, Damascus," [in Arabic], February 10, 2020, <https://stepagency-sy.net/2020/02/10/%d8%a8%d8%a7%d9%84%d9%81%d9%8a%d8%af%d9%8a%d9%88-%d8%a7%d9%86%d9%81%d8%ac%d8%a7%d8%b1-%d8%b3%d9%8a%d8%a7%d8%b1%d8%a9-%d9%85%d9%81%d8%ae%d8%ae%d8%a9-%d9%81%d9%8a-%d8%ad%d9%8a-%d8%a7%d9%84%d9%85%d8%b2/>.

<sup>97</sup> Institute for the Study of War, "Syria Situation Report: January 21 - February 4, 2020," posted February 2020, <http://www.iswresearch.org/2020/02/syria-situation-report.html>. A weekly report of that contains significant activities in Syria. This can be consistently accessed from the Institute for the Study of War.

<sup>98</sup> Institute for the Study of War, "Pro-Assad Regime Forces Locked in Battle of Attrition in Idlib Province," updated July 2, 2019, <http://www.iswresearch.org/2019/06/pro-assad-regime-forces-locked-in.html>; Bethan McKernan, "Assad's Exhausted Army in Need of Reinforcements as Idlib Battle Looms," *The Guardian*, October 10, 2018. <https://www.theguardian.com/world/2018/oct/10/assads-exhausted-army-in-need-of-reinforcements-as-idlib-battle-looms>; War, "Syria Situation Report"; "The View from U.S. CENTCOM - YouTube."

<sup>99</sup> Eric Schmitt, "Russians Pressure U.S. Forces in Northeast Syria," *The New York Times*, February 14, 2020. <https://www.nytimes.com/2020/02/14/world/middleeast/russia-northeast-syria.html>.

willingness to engage Syrian Army elements.<sup>100</sup> As these factors demonstrate, the situation only grows more complex.

Clearly, the underlying factors that sparked the Syrian Civil War remain, as well as some additional dynamics. Bashar Al-Assad will not suddenly become less tyrannical, and the Arab rebels in northwest and southwest Syria remain unlikely to accept him. The Kurds and the Turks will remain enemies that threaten security along the northern border. The complexity of the situation in Syria has not been simplified, and it will likely take considerable Iranian and Russian investment if conditions are to ever stabilize. Considering their sluggish domestic economies and already strained international commitments, the price of creating a stable Syria may be too steep.<sup>101</sup> In short, recent events illuminate that, while it is attempting to consolidate control, the Assad regime, along with its Iranian and Russian supporters, remains extremely vulnerable to insurgent activity throughout the country.

With these factors present, how should the United States undertake irregular warfare in Syria should it choose to compete there? First, it could stoke, prepare and support the insurgency. The United States is well-positioned to accomplish this due to its presence in the peripheral corners, northeastern and southern, of Syria and its enduring relationships with the Vetted Syrian Opposition and its associated factions. Second, the United States could push the narrative that Russia and Iran support a brutal dictator who has, and will again, use chemical weapons against his own population. This would be a simple and true narrative that will stoke the rage of the Syrian people and force the international community to grapple with its relationships with Russia and Iran.

The preparations for such activity could actually begin prior to a complete troop withdrawal, while the United States remains overtly in Syria. Without appearing to increase its commitment, the United States could prepare the resistance to operate in a latent or

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<sup>100</sup> Carlotta Gall, "Turkey Declares Major Offensive Against Syrian Government," *The New York Times*, March 1, 2020. <https://www.nytimes.com/2020/03/01/world/middleeast/turkey-syria-assault.html>.

<sup>101</sup> Andrey Ostroukh, "Russia's 2019 GDP Growth Seen Slowing to 1%, Central Bank to Cut Rates Further: Reuters Poll," *Reuters*, July 31, 2019, <https://www.reuters.com/article/us-russia-economy-idUSKCN1UQ1RQ>.

incipient phase as it seeks to impose economic costs on Syria, Russia and Iran. Choosing a course of action such as this, again only if it chose a policy of competition in Syria, would allow the United States to exploit the vulnerabilities of its adversaries: Iran's exposed positions in southern Syria, Russia's poor attempts at counterinsurgency, and Syria's thinly spread military assets.<sup>102</sup>

To achieve this, actions in Syria could be directed to remain below an assessed threshold that has been determined to be low enough to avoid triggering escalation. This would be aimed at imposing economic and military costs on nations that are experiencing domestic economic struggles that threaten their ability to sustain its war effort. Syria's economy has shown signs of near-complete collapse under U.S. sanctions. Iran is in a similar situation. Under U.S. sanctions that have inflicted severe damage to the domestic economy, Iran may already be showing signs that it needs to retract portions of its commitments in Syria.<sup>103</sup> Additional pressure of a mobilized insurgency would only add to the difficulty of bringing the country under control. Such difficulty could also allow the United States, through an overt psychological operation and media campaign, to target the fractures that would invariably emerge in the relations between Syria, Russia, and Iran.

With all of these conditions seemingly in favor of the United States, why not, as some have suggested, simply ramp up U.S. military commitments in Syria? The answer lies in the type of GPC in which the United States is involved in Syria. First, in the greater context, Russia and Iran seek to expand their influence and have committed resources to do so as their stake in Syria is larger. This could allow the United States to shape events by exploiting the vulnerabilities of their commitment through a proper and precise application of irregular warfare. With minimal exposure, the United States, using special operations

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<sup>102</sup> Evan Hill and Christiaan Triebert, "12 Hours. 4 Syrian Hospitals Bombed. One Culprit: Russia.," *The New York Times*, October 13, 2019. <https://www.nytimes.com/2019/10/13/world/middleeast/russia-bombing-syrian-hospitals.html>; Suleiman Al-Khalidi, "Russian and Syrian Air Strikes Intensify on Last Rebel Bastion," *Reuters*, March 13, 2019, <https://www.reuters.com/article/us-mideast-crisis-syria-idlib-idUSKBN1QU2CG>.

<sup>103</sup> *Reuters Staff*, "Israel's Outgoing Defence Minister Says Iran Starting to Withdraw from Syria," *Reuters*, May 18, 2020, <https://www.reuters.com/article/us-israel-iran-syria-idUSKBN22U2MU>. The Israeli Defense Minister's claim that Iran had started to withdraw troop was refuted by Iran. Interestingly, Iran refuted this by reasserting its goal of expelling the U.S. from Iraq. This is further evidence of its clear policy goal of a Middle East independent of U.S. influence.



forces trained in irregular warfare, could impose significant costs on Iran, Russia, and Syria. While it unlikely that these countries could recover from a well-coordinated effort, even the costs of such an undertaking would serve strategic interests more broadly.

Additionally, the United States' most glaring vulnerability with regards to Iran is its unspoken constraint against initiating a ground war against Iran. Though the United States has taken unprecedented steps, such as the targeted killing of Qassem Soleimani, to curb Iranian malign activity, these actions fall well short of any strategic indication of a willingness to escalate to conventional war. This constraint, while reasonable, also emboldens Iran, as well as Russia. Therefore, introduction of additional overt U.S. forces in Syria would only enhance the vulnerability of large troop deployments in the Middle East. Much as has occurred in Iraq, Iran would view the troops as legitimate targets and may choose to stage attacks on them. This would eliminate the advantage that the United States currently holds in the GPC and irregular warfare arenas throughout the region.

If the United States chooses to engage in GPC in Syria, a recognition of the stakes and commitments of each side should aid in the selection of a strategy. Given Iran and Russia's commitment to expanding their influence in the Middle East, the United States needs only impose adequate costs and expose the weaknesses of its adversaries to achieve its strategic goal of weakening Iran and Russia in the region. Should the United States choose a policy of competition, proper application of irregular warfare could present it with additional strategic opportunities and responsibilities to capitalize on the failure of the Iranian and Russian venture in Syria.

By capitalizing on the instability and competing interests in Syria, the United States can turn the tables on the aspiring powers by harassing them incessantly there. This can be accomplished by combining American capabilities of irregular warfare and psychological warfare with the already in-place resistance to the Alawite regime of Bashar al-Assad. The goals of such an irregular warfare approach do not need to include regime change. The goals can be more limited and manageable, as they were in the initial stages of the covert action in Afghanistan. Harassing the Russians and Iranians and forcing the expenditure of their treasure would be a worthy goal of American irregular warfare in Syria. Harassment of those countries has the potential to disrupt the advancement of the Russian or Iranian

agendas during this era of competition. Drawing additional resources and investment from either adversary could shape the overall competitive environment and allow the United States to preserve the overall status quo international order that has benefitted it and other democratic nations since the end of the Cold War.

Despite the potential benefits of supporting resistance movements, many would argue that these activities in places like Syria can threaten global perceptions of the United States. Certainly, there is inherent risk involved. However, adequate selection of the locations for this form of irregular warfare can mitigate those risks. Choosing to execute this type of irregular warfare in locations where resistance activities and instability already exist against a government leader whom the world perceives as corrupt, ineffective, tyrannical or illegitimate will minimize the risk to the American reputation. For example, in Syria, the United States could make the case that it is supporting the resistance to Assad's regime, which has used chemical weapons against his own people, bombed internally displaced persons camps, and will undoubtedly order reprisals in territory that the Syrian Arab Army regains. In doing so, the United States could also, through effective information operations, associated Assad's Russian and Iranian backers, making American support for the already active resistance much more palatable in the international community.

#### **D. CONCLUSION – IRREGULAR WARFARE CAN IMPOSE COSTS ON AMERICA'S GREAT POWER ADVERSARIES**

Irregular warfare has been used to effectively impose costs and disrupt America's competitors in the attainment of their national goals. In the renewed era of GPC, an irregular approach of this sort can be effective given the proper circumstances. To be truly effective, the team executing the strategy in each location should be tailored to that particular environment so that problems can be layered using a full range of irregular capabilities (guerrilla warfare, sabotage, subversion, cyber, psychological warfare, economic warfare, etc.) to maximize the impact and create a breadth of issues to ensnare America's enemies. While such an approach may be successful in individual cases, to truly shape the global competitive environment, irregular capabilities can be applied in multiple locations in a swarming and loosely networked manner. This singular aspect of irregular warfare would serve to distract America's competitors and drain them of resources,

political will, and public and international support. The United States, however, utilizing irregular warfare of a different type could strengthen partnerships considered vital to maintaining the liberal international order that has bred success for democratic nations over the past 20 years.

#### **IV. TO STRENGTHEN AND DEFEND PARTNERS: IRREGULAR WARFARE TO PREVENT INSURGENCY, SUBVERSION AND FOREIGN ENCROACHMENT**

While adopting a strategy of imposing costs where America's chief competitors are vulnerable can create negative and disruptive effects, other aspects of irregular warfare seek to create positive and stabilizing effects in America's sphere of influence. This has been accomplished in various ways throughout the country's history, but its predominant vehicle, from an irregular warfare perspective, has been through security partnerships and FID. FID is an element of irregular warfare that uses American advisors to train and organize security forces of a partner or ally against potentially destabilizing actors or forces. Such an effort, from the American perspective, prevents the deterioration of the status quo international order and creates additional proficient forces to combat instability, whether created by subversive state or non-state actors. By strategically utilizing this advisory role, the United States can employ irregular warfare as a non-standard means to expand or solidify its influence in pursuit of the national policy of preserving a free and open international order, especially when that order is threatened by encroaching Great or aspiring powers.<sup>104</sup>

Applied further, relationships in areas vulnerable to adversarial influence, such as Ukraine, Georgia, or the Philippines, allow the United States to harden resiliency and help prepare the host nation for a potential invasion from a state seeking to reverse the status quo. By executing FID missions, not only does the United States aid in the preparation of defense forces, but it can also prepare to support a future combined effort against an occupying or attacking force. Such a relationship, already being established ahead of a crisis, would prove critical during the important moments in the aftermath of an adversarial

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<sup>104</sup> *JP 3-22: Foreign Internal Defense*, 2002, ix. As defined in the introduction, "Foreign internal defense is the participation by civilian agencies and military forces of a government or international organization in any of the programs or activities taken by a host nation (HN) government to free and protect its society from subversion, lawlessness, insurgency, violent extremism, terrorism, and other threats to its security. The United States Government (USG) applies FID programs or operations within a whole-of-government approach to enhance an HN internal defense and development (IDAD) program by specifically focusing on an anticipated, growing, or existing internal threat."

maneuver, similar to the Russia fait accompli in Crimea. Options and strategies for thwarting the attack will have been preestablished, allowing them to be enacted quickly. Finally, by pursuing and maintaining these relationships, the United States, clearly signals its interest and intent to potential enemies. The investment of forces in an advisory role indicates that the United States and its partners would be resilient against subversive actions and would resist an invasion or occupation with their full measure. In other words, investment in a country or region by the United States makes it clear to the enemy that military action there would not be assured success, and the potential for intense conflict would have to be weighed.<sup>105</sup>

Though it is difficult to find examples of the United States employing irregular warfare to thwart another state actor's subversive or hostile activities in an allied country, lessons and principles can be drawn from two U.S. counterinsurgency and counterterrorism efforts. First, in 1967, the United States employed this form of irregular warfare to train and employ Bolivian Rangers, who were pursuing Che Guevara as he attempted to build a communist insurgency to foment revolution in South America. Second, in the Philippines after 9/11, the United States utilized an irregular approach in a largely successful counterterrorism effort against the Abu Sayyaf Group on the island of Basilan. Both cases of American irregular warfare, though not specifically directed against forces sponsored by state actors, demonstrate successful examples of the United States enabling the defeat of irregular forces within the borders of an ally through small teams with broad capabilities. A similar approach can be adopted in the struggle to protect important American allies who are threatened by the resurgence of other great powers.

#### **A. U.S. ARMY SPECIAL FORCES IN BOLIVIA (1967)**

In 1967, at the height of the Cold War, the United States, at the request of Bolivian President René Barrientos, sent an Army Special Forces Team to Bolivia to help solidify the country's defense in the face of a growing communist threat.<sup>106</sup> Although the presence

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<sup>105</sup> Otto C. Fiala, *Resistance Operating Concept* (MacDill Air Force Base, Florida: Joint Special Operations University Press, 2020), [https://jsou.libguides.com/ld.php?content\\_id=54216464](https://jsou.libguides.com/ld.php?content_id=54216464).

<sup>106</sup> Robert W. Jones Jr., "Beggar on a Throne of Gold: A Short History of Bolivia," *Veritas: Journal of Special Operations History*, Special Edition: Special Forces In Bolivia, 4, no. 4 (2008): 8.

of communist revolutionary leader Che Guevara was unknown at the outset, it was clear that communist elements were organizing and taking action against the newly elected democratic government.<sup>107</sup> However, the threat was, in fact, being organized by Guevara, whose whereabouts were unknown after his failure to incite revolutionary change in the Democratic Republic of the Congo.<sup>108</sup> Now, Guevara intended to spark a communist insurgency in Bolivia that he hoped would threaten multiple Latin American countries and eventually draw the United States into a large, messy war resembling the then-ongoing conflict in Vietnam.<sup>109</sup> Even before it learned of Guevara's presence in Bolivia, the United States deployed a select Army Special Forces Team to maintain the stability of the democratic government and prevent communist subversive elements from threatening the government.

Guevara's resistance movement in Bolivia began in 1966, when Bolivia, off the heels of a coup d'état in 1964, democratically elected President René Barrientos. Guevara, viewing Bolivia's checkered history, identified the conditions there as favorable to his revolutionary ideals.<sup>110</sup> Based on previous experience and on reporting from sources in Bolivia, he believed the newly installed Barrientos presidency to be facing massive dissent among the populace.<sup>111</sup> Additionally, Guevara judged the Bolivian military to be poorly organized and susceptible to an insurgency.<sup>112</sup> Because of this perceived political instability, Guevara chose Bolivia to be the place of his next revolutionary movement.

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<sup>107</sup> Jones Jr., 12–13.

<sup>108</sup> Troy J. Sacquety, "Che Guevara: A False Idol for Revolutionaries," *Veritas: Journal of Special Operations History*, Special Edition: Special Forces In Bolivia, 4, no. 4 (2008): 31; Henry Butterfield Ryan, *The Fall of Che Guevara a Story of Soldiers, Spies, and Diplomats* (New York: Oxford University Press, 1998), 13.

<sup>109</sup> Troy J. Sacquety, "Che Guevara: A False Idol for Revolutionaries," 31; Robert W. Jones Jr., "'Today a New Stage Begins': Che Guevara in Bolivia," *Veritas: Journal of Special Operations History*, Special Edition: Special Forces In Bolivia, 4, no. 4 (2008): 53.

<sup>110</sup> Robert W. Jones Jr., "Beggar on a Throne of Gold: A Short History of Bolivia," 12–13.

<sup>111</sup> Troy J. Sacquety, "Che Guevara: A False Idol for Revolutionaries," 53.

<sup>112</sup> Alan C. Cunningham, "The Effects of the U.S. Army's Special Forces in Bolivia during Che's Foco," *Small Wars Journal*, November 11, 2020, <https://smallwarsjournal.com/jrnl/art/effects-us-armys-special-forces-bolivia-during-ches-foco>.

To best capitalize on the country's instability, Guevara sought to establish his insurgency in the dense forest along Bolivia's border with Brazil.<sup>113</sup> He transplanted experienced Cuban revolutionaries to serve as a cadre and initially relied on the associated military support in Bolivia. Once established, Guevara intended to build base camps and establish logistical capabilities to support his future insurgent operations.<sup>114</sup> Next, Guevara would train guerrillas who had been recruited from the countryside and, when prepared, would execute guerrilla-style "hit and run" tactics against softer, rural targets.<sup>115</sup> Success in those attacks, Guevara surmised, would generate support for the guerrilla organization and increase its membership. Once of adequate size and capability, the guerrilla groups would then execute additional attacks intended to force a withdrawal of the military back into the cities. Finally, having succeeded in supplanting the military, Guevara would direct attacks against major cities in Bolivia.<sup>116</sup>

By creating a rampant insurgency in the heart of South America, Guevara expected that the United States would intervene, first with a minimal investment of troops, then with the introduction of conventional forces.<sup>117</sup> Such a move, he posited, would enable his guerrillas to embroil the United States in a difficult insurgency, which, as Vietnam was still ongoing, would stretch its resources and contribute to its defeat.<sup>118</sup> His vision was noted ten years earlier in his diary, when he wrote of bringing revolution to South America: "I will set myself up in the selva at the frontier between Bolivia and Brazil...From there it is possible to put pressure on three or four countries."<sup>119</sup> Guevara intended to take advantage

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<sup>113</sup> Henry Butterfield Ryan, *The Fall of Che Guevara a Story of Soldiers, Spies, and Diplomats*, 64; Robert W. Jones Jr., "'Today a New Stage Begins': Che Guevara in Bolivia," 55.

<sup>114</sup> Christopher Rodriguez, "The Bolivian Insurgency of 1966–1967: Che Guevara's Final Failure," *Small Wars Journal*, September 23, 2018, [https://smallwarsjournal.com/jrnl/art/bolivian-insurgency-1966-1967-che-guevaras-final-failure#\\_edn19](https://smallwarsjournal.com/jrnl/art/bolivian-insurgency-1966-1967-che-guevaras-final-failure#_edn19); Jones Jr., 54–56.

<sup>115</sup> Ryan, *The Fall of Che Guevara a Story of Soldiers, Spies, and Diplomats*, 47; Jones Jr., "'Today a New Stage Begins': Che Guevara in Bolivia," 54.

<sup>116</sup> Jones Jr., 54.

<sup>117</sup> Jones Jr., 54.

<sup>118</sup> Jones Jr., 54; Henry Butterfield Ryan, *The Fall of Che Guevara a Story of Soldiers, Spies, and Diplomats*, 79–80.

<sup>119</sup> Jean Larteguy, *The Guerrillas* (New York, NY: Signet Publishing, 1972), 27.

of the difficult terrain along the borders of these two countries to grow an insurgency capable of influencing the entire region. As a leading proponent for communist insurgency in Latin and South America during the 1960s, Guevara represented a clear threat to American foreign policy in the region.<sup>120</sup> Guevara was depending on this threat to American foreign policy to achieve his goal of creating an additional quagmire in South America.

However, having received reports of insurgent activity in the rural eastern portion of his country, President Barrientos requested military assistance from the United States. The United States agreed and specifically organized and deployed a U.S. Army Special Forces Team for the mission. It is important to note that the United States sent this team before any significant insurgent movement had begun; when the Special Forces Team arrived, there was not a widespread insurgency to deal with, only the beginning of a revolutionary effort. This made the situation more manageable and allowed adequate time for effective training.

Though Guevara's presence was originally unknown, the deployment of the team is indicative of the wider global upheaval that threatened U.S.-led democracy.<sup>121</sup> According to its commander, Major Ralph W. Shelton, the team's initial mission was to train a Bolivian Ranger Battalion because the country was being threatened from the frontier by communists.<sup>122</sup> To accomplish their mission, the Special Forces Team executed a textbook FID mission. Upon arriving at their selected training site in the remote Bolivian town of La Esperanza, the team assessed that the Bolivian Rangers needed training that began at the basic level before progressing to the requisite advanced collective tasks.<sup>123</sup> As such, the Special Forces Team created a program of instruction that spanned four phases, with training beginning with the basic individual level and ending with advanced

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<sup>120</sup> Troy J. Sacquety, "Che Guevara: A False Idol for Revolutionaries," 31.

<sup>121</sup> Henry Butterfield Ryan, *The Fall of Che Guevara: A Story of Soldiers, Spies, and Diplomats*, 91.

<sup>122</sup> Charles H. Briscoe, "Introduction," *Veritas: Journal of Special Operations History*, Special Edition: Special Forces In Bolivia, 4, no. 4 (2008): 2.

<sup>123</sup> Kenneth Finlayson, "Turning the Tables on Che Guevara: The Training at La Esperanza," *Veritas: Journal of Special Operations History*, Special Edition: Special Forces In Bolivia, 4, no. 4 (2008): 77–78.



collective tasks that would be required in future counterinsurgency operations.<sup>124</sup> Training also culminated with a field training exercise in conditions that mimicked the unit's future real-world counterinsurgency operations.<sup>125</sup>

Once employed in combat, the Bolivian Rangers proved effective; their counterinsurgency operations began only 12 days after completing the course.<sup>126</sup> Those operations ultimately resulted in the relatively quick capture of Guevara and the disruption of his communist revolutionary movement in Bolivia. Having joined the ongoing search for Guevara and his revolutionaries in September 1967, the Rangers quickly and effectively established a cordon of the area where Guevara was believed to be. On 8 October 1967, the Rangers received a report from a local farmer who observed Guevara's element moving along the edge of his field. Reacting quickly, the Rangers isolated the area, trapping Guevara and his men in a canyon.<sup>127</sup> After several failed attempts to break the cordon, Guevara was ultimately captured in a final attempt to escape the snare of the Rangers.<sup>128</sup> The tactical proficiency displayed by the Bolivian Ranger Battalion reflects on the training provided by the Special Forces Team, and the strategic impact, that the elimination of a subversive element and global revolutionary had on the nation of Bolivia.

In addition to expert training and engagement with local forces, key to the mission's success was the Special Forces Team's utilization of other capabilities inherent to irregular warfare, such as civil affairs, to establish rapport and gather intelligence on communist activity in the countryside. To better ingratiate itself with the local population, the Special Forces Team supported the local economy by frequenting local businesses rather than relying on their own logistical infrastructure for resources. The majority of the team's basic

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<sup>124</sup> Finlayson, 78; Christopher Rodriguez, "The Bolivian Insurgency of 1966–1967: Che Guevara's Final Failure."

<sup>125</sup> Finlayson, 76–85.

<sup>126</sup> Finlayson, 83; Alan C. Cunningham, "The Effects of the U.S. Army's Special Forces in Bolivia during Che's Foco."

<sup>127</sup> Kenneth Finlayson, "The 2nd Ranger Battalion and the Capture of Che Guevara," *Veritas: Journal of Special Operations History*, Special Edition: Special Forces In Bolivia, 4, no. 4 (2008): 95–96; Cunningham, "The Effects of the U.S. Army's Special Forces in Bolivia during Che's Foco."

<sup>128</sup> Alan C. Cunningham, "The Effects of the U.S. Army's Special Forces in Bolivia during Che's Foco.."

life support items were purchased through off of the local economy. Additionally, the team frequently ate and socialized with locals at nearby restaurants. This effort effectively established rapport with the local populace and provided ample evidence that the Americans were friends rather than foes.<sup>129</sup> In an environment where an adversarial idea or movement may be under way, support of the populace is significant and can help counter the pull of the threatening ideology before it has actually begun.

In addition to supporting the local economy, Special Forces medics taught sanitation and provided medical services to the locals.<sup>130</sup> Civil affairs operations were intentionally expanded as the medics were also sent to nearby towns to provide medical treatments, further enhancing public sentiment and in creating additional sources of information.<sup>131</sup> Additionally, the medics worked with local Peace Corps volunteers in providing aid to local villagers. The bulk of the issues they addressed resulted from poor hygiene and contaminated water. In sum, the medics treated over 2,500 Bolivian civilians and used \$10,000 of medicine and supplies. The payoff was a largely supportive population that would frequently provide information to the Americans.

Finally, the Special Forces Team was instrumental in completing the construction of a school in cooperation with United States Agency for International Development (USAID).<sup>132</sup> The locals presented the team with their concerns over the lack of progress on a project to build a school and requested help. Over the course of several months, Major Shelton pressured the USAID representatives to provide the funding and supplies to complete the project. Though progress on the project remained slow, it was ultimately completed in December of 1967.<sup>133</sup> While these efforts in medical care and civil affairs operation did not directly contribute to the tactical success of eliminating the communist

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<sup>129</sup> Charles H. Briscoe, "Field Sanitation, Practicing Medicine, and Civic Action in Bolivia," *Veritas: Journal of Special Operations History*, Special Edition: Special Forces In Bolivia, 4, no. 4 (2008): 68–75.

<sup>130</sup> Briscoe, 68–75; Henry Butterfield Ryan, *The Fall of Che Guevara a Story of Soldiers, Spies, and Diplomats*, 94.

<sup>131</sup> Briscoe, 73; Ryan, 94.

<sup>132</sup> Briscoe, 68–75.

<sup>133</sup> Briscoe, 74.

revolutionaries in Bolivia, they did set favorable conditions and built positive civilian sentiment that contributed to operational success.<sup>134</sup>

After the team's success in training the Bolivian Rangers and in supporting the local population, the Bolivian government continued its relationship with the U.S. Army Special Forces by enlisting their assistance in training nine additional infantry companies and advising one airborne battalion in small unit tactics and counterinsurgency operations. This continued relationship, essentially between the Bolivian and American governments, is a positive and tangible effect of successful irregular warfare missions. Though Che Guevara's legacy likely outshines his true impact, there was little doubt that his existence and his operations presented a threat to democratic nations and to the United States, by way of its allies. American foreign policy interests were protected, and American irregular warfare strategy increasing the Bolivian's military's tactical ability and state stability in Bolivia simultaneously.

Though not specifically countering a peer-state actor, the success of the mission remains an example of how irregular warfare can be used to strengthen capabilities of American partners and can prevent the sprawling influence of adversarial irregular forces. While this case presents numerous tactical lessons about the conduct of FID, the strategic impact matters most in terms of relevance to GPC. While the immediacy of these results, the Bolivian Rangers captured Guevara within one month of completing their training with U.S. Special Forces, cannot be guaranteed, the mission indicates the broader ability of this form of irregular warfare in hardening allies against potential threats to stability. Similarly, to the Bolivian experience, a more modern example of FID can be seen in the Philippines.

## **B. THE PHILIPPINES: OEF-P AND AMERICA'S COUNTERTERRORISM EFFORTS**

During the early stages of the Global War on Terrorism, as U.S. counterterrorism and counterinsurgency efforts greatly expanded in Iraq and Afghanistan. However, counterterrorism operations in the Philippines remained small and irregular, despite the

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<sup>134</sup> Briscoe, 74.

fact that counterterrorism cooperation in the Philippines predated the 9/11 attacks.<sup>135</sup> Known as a potential hotbed, several prominent terrorist organizations, the Abu Sayyaf Group and the Moro Liberation Front are based in the Philippines, while others take advantage of the availability of safe havens in the country. Many of the groups have ties to al-Qaeda, which used them to expand its reach and promote the perception of a global terrorist network.<sup>136</sup> Though the counterterrorism effort in the Philippines gained renewed emphasis following the 9/11 attacks, they were never truly able to expand due to American political concerns and the reluctance of the Filipino government to allow broad and overt U.S. support. This combination manifested into a series of restrictions that ultimately forced the United States to adopt an irregular approach to combatting terrorism in the Philippines.

As a result, the United States Pacific Command leaned heavily on its Theater Special Operations Command, Special Operations Command – Pacific, to develop a plan to enable the Filipino counterterrorism effort. Given the extent of operations elsewhere at the time, first in Afghanistan and then in Iraq, the Philippines remained an “economy of force theater.”<sup>137</sup> Correspondingly, Special Operations Command – Pacific approved a plan to build the Filipino Armed Forces’ ability to defend against insurgency and terrorism and maintain national stability.<sup>138</sup> In addition, both the government of the Philippines and U.S. forces agreed to execute humanitarian and civic action projects to improve the lives of the disaffected population and to endear government support in the population.<sup>139</sup> They also agreed to employ information operations and psychological warfare to highlight their

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<sup>135</sup> Hy S. Rothstein, “Less Is More: The Problematic Future of Irregular Warfare in an Era of Collapsing States,” *Third World Quarterly*, *The Long War: Insurgency, Counterinsurgency and Collapsing States*, 28, no. 2 (2007): 282–83.

<sup>136</sup> David S. Maxwell, “Operation Enduring Freedom Philippines: What Would Sun Tzu Say?,” *Military Review* May-June 2004 (2004): 22.

<sup>137</sup> Charles H. Briscoe, “Balikatan Exercise Spearheaded ARSOF Operations in the Philippines,” *Special Warfare*, 17, no. 1 (September 2004), 17–18.

<sup>138</sup> Hy S. Rothstein, “Less Is More: The Problematic Future of Irregular Warfare in an Era of Collapsing States,” 284.

<sup>139</sup> Rothstein, 284.

activities against terrorism and in support of the population.<sup>140</sup> This approach utilized multiple aspects of irregular warfare and combined multiple capabilities that were uniquely tailored to achieve the stated goals.

The thrust of the effort against terrorism in the Philippines was centered on establishing a semblance of security in Basilan, the region where the Abu Sayyaf Group flourished. These efforts came from U.S. Army Special Forces, who initially focused on training Filipino forces in combat skills. The training produced more effective Filipino units, and subsequently, security forces increased their patrolling operations in Basilan. The uptick in counterterrorist patrols gradually allowed Filipino forces to regain control at local levels, and established the security required to leverage other capabilities in the effort against Abu Sayyaf and other terrorist organizations.<sup>141</sup>

With footholds of security at local levels, civic action, humanitarian assistance and information operations were employed to expand security and generate stability in the region. The United States supported the Filipino government's efforts to restore essential services and provide basic life support.<sup>142</sup> The projects also served to stimulate local economies, as labor and materials were frequently sourced locally. As the projects succeeded, appropriate messages further consolidated the support of the local populace, increasing support for the Filipino government and armed forces. Although Abu Sayyaf was not destroyed, the group's sanctuary was severely restricted and the Basilan region had the potential for peace and stability.<sup>143</sup>

While a certain degree of success was achieved in the irregular warfare effort in the Philippines, missteps also occurred. The level of restrictions that were imposed on U.S. Special Forces Teams on accompanying the partner force and on the employment of certain capabilities and tactics, must be identified. Without the resolution of these missteps, use of

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<sup>140</sup> Gregory R. Wilson, *Operation Enduring Freedom -- Philippines: "The Indirect Approach"* (Carlisle Barracks, PA: U.S. Army War College, 2006), 5–6.

<sup>141</sup> Rothstein, 285.

<sup>142</sup> Wilson, *Operation Enduring Freedom -- Philippines*, 13.

<sup>143</sup> Larry Niksch, *Abu Sayyaf: Target of Philippine-U.S. Anti-Terrorism Cooperation*, CRS Report No. RL31265 (Washington, DC: Congressional Research Service, 2007), <https://fas.org/sgp/crs/terror/RL31265.pdf>.

U.S. irregular warfare in the future would prove detrimental to its ability to effectively strengthen its partners and allies and prevent influence by other great power competitors. The concept of employing small teams with a wide array of capabilities comes with the need to allow those experts a wider berth to operate to accomplish the mission. This certainly does not mean that operators can act as they please, but rather, that severe restrictions that limit American activities should be avoided, as they tend to also limit effectiveness. Instead, operations such as the battle against the Abu Sayyaf Group should have support from both the U.S. and host nation governments and clear but wide limits on American activities should be applied.<sup>144</sup>

Still, the American experience in the Philippines represents successful application of American irregular warfare. Though the Abu Sayyaf Group has not been eradicated, its impact and reach were significantly curtailed. In this case, the historical instability in the Philippines and the prevalence of destabilizing forces made the effort more extensive in energy and duration than was required in Bolivia. This distinction suggests that the earlier the United States can get involved in thwarting subversion, the simpler the effort may be. Waiting until an issue arises may prove detrimental in that the problem may have taken root and will then require extensive effort to uproot. However, the Philippines remains as an example of a small number of American forces that succeeded in using a wide range of capabilities to counter an irregular enemy within the borders of an ally.

### **C. CONCLUSION**

Through the analysis of the cases presented against communist insurgency in Bolivia and against terrorism in the Philippines, it is clear that American counterinsurgency and counterterrorism efforts effectively used irregular warfare to degrade and disrupt irregular threats within the borders of allies. Specifically, several important factors emerge. First, the United States can and has employed irregular warfare to support and stabilize allies that are facing an irregular challenge. It is important to note that in both cases, these efforts occurred at the behest of and with the permission and participation of the host

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<sup>144</sup> David S. Maxwell, "Operation Enduring Freedom Philippines: What Would Sun Tzu Say?," 21–22.

nation. This, therefore, represents the more overt side of American irregular warfare. Certainly, operational security must be maintained, but American irregular forces will not always be operating in the same clandestine manner as would be expected when supporting resistance forces as discussed in Chapter 3. In fact, the clear policy and commitment to cooperation between the United States and the host nation greatly bolstered the efforts.<sup>145</sup> Such cooperation will remain important in countering the various irregular threats posed during this renewed era of GPC.

Second, the counterinsurgent and counterterrorism elements deployed by the United States in these case studies leveraged a wide range of capabilities to counter their specific threats. In each situation, the special operations force was tailored to meet the unique characteristics of the enemy and the environment. While those capabilities remained relatively basic, utilizing operational training, civil affairs, and psychological operations, it is the concept of creating teams uniquely tailored for the problem that must endure. America's competitors employ a diverse range of capabilities in their efforts to upend the status quo, and small, networked units of American forces should be permitted to deploy with a plethora of capabilities to meet those challenges in multiple locations. Depending on the situation, the requisite capabilities will likely be expanded and may include nonstandard military packages to account for the numerous axes along which adversaries are seeking to compete. These different capability packages, which will likely be needed at the small unit level, will be required to achieve the desired comprehensive effects. The combination of multiple capabilities is emblematic of the irregular approach and should be considered as a critical aspect of the American approach. The creation of tailored units capable of applying multiple capabilities to unique situations is an important characteristic of American irregular warfare and should be considered as the United States seeks to apply it to the current competitive environment.

Furthermore, future subversion, insurgency or other irregular threats will not necessarily look like Che Guevara's band of guerrillas or the Abu Sayyaf Group, and therefore, other capabilities may need to be utilized. In fact, the selection of these case

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<sup>145</sup> Hy S. Rothstein, "Less Is More," 286–87.

studies does not imply that counterterrorism or counterinsurgency principles hold true across the board in GPC, but they do demonstrate the ability of small, tailored teams to improve host nation capability and preserve the strategic value of key partner and allies. Therefore, nodes of comprehensive irregular warfare capabilities that are small, agile, and comprehensive in their ability to counter foreign subversion and adventurism will be critical to strengthening America's allies and protecting its well-established international order.

Finally, using irregular warfare in this way to combat other great power aggression can help to eliminate subversive forces and make the allied host country more stable. By improving security forces in threatened or developing nations, the United States, through its important network of allies, can harden itself against irregular or asymmetric threats during GPC. Such an approach should be considered in any case where the United States has clear interests that directly conflict with its adversaries. As competitors venture into that space, the United States must have a ready option to prevent instability and close the door to actors seeking to revise the international order in their favor. With Russian efforts to expand its borders, and Chinese designs on multiplying its influence, an irregular warfare strategy, uniquely applied, has the ability to maintain stability in exposed American allies. Such efforts should be aimed at preventing subversive or adversarial elements or ideas from taking root, and in maintaining stability and resiliency in the face of an encroaching enemy; they can also prevent or diminish the effectiveness of competitors in cultivating influence and change in areas where the United States has a national interest in retaining an allied relationship.



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## V. PREPARE FOR ESCALATION: THE UTILITY OF IRREGULAR FORCE IN TRADITIONAL CONFLICT

Despite the benefits offered through a networked and comprehensive irregular warfare campaign, proponents of investment in conventional military modernization argue that America's chief competitors have chosen to employ their own irregular strategies ultimately as a preparatory measure for full-scale conflict. These more discreet operational activities are meant to dissuade U.S. involvement, allowing for continuous but measured progress while they build their conventional forces to a level of parity with the United States. In fact, this argument is true: as Chapter II notes, adversarial irregular strategies, are multifaceted. America's competitors are employing their brand of irregular warfare in lieu of leverage provided by traditional military balance. While the Russians focus on hybrid warfare, they are also modernizing their nuclear arsenal and making significant technological advancements within their military.<sup>146</sup> The Chinese, amidst their progress through more subtle means outlined in *Unrestricted Warfare*, have outpaced the United States in terms of military size.<sup>147</sup> Their development of air, land, and naval power is, in conjunction with their development of Anti-Access/Area Denial systems, clearly in preparation for a military engagement with the United States.<sup>148</sup> And Iran, while seeking influence in the Middle East through its asymmetric strategy built on regional proxies, and to make up for its lagging military in comparison with the United States, has continued its effort to build a nuclear program and sought to more closely align itself with Russia and China.<sup>149</sup>

While the preferred irregular strategies of these countries are shaping the environment and buying time for their militaries catch up, this does not justify the exclusion

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<sup>146</sup> Dale R. Herspring, "Russian Nuclear and Conventional Weapons; The Broken Relationship," *Russian Nuclear Weapons: Past, Present, and Future* (Carlisle Barracks, PA: Strategic Studies Institute, U.S. Army War College, 2011), 3.

<sup>147</sup> Department of Defense, *Military and Security Developments Involving the People's Republic of China 2020*.

<sup>148</sup> Department of Defense.

<sup>149</sup> Kilcullen, *The Dragons and The Snakes: How the Rest Learned to Fight the West*, 29–30.

of irregular warfare as a key component of U.S. strategy as it relates to GPC. First, inaction against adversarial irregular strategies ignores the strategic effects being attained in that realm. Second, and importantly, this argument also ignores the utility that irregular warfare has played and that conventional forces have needed it to play in even the most traditional of military conflicts. Evidence of such utility can be found in the cases of the American-led Filipino Resistance in North Luzon and the experience of the Jedburgh teams in France, both during the Second World War.

Although World War II is frequently regarded as one of the great traditional conflicts in history, it featured a considerable amount of irregular warfare. Allied commanders sought to tap into resistance forces in order to gain an advantage by directing them in operations that supported the broader allied mission. However, effective communication systems and logistical networks were not pre-established, making coordination of operations difficult in hostile environments. Intuitively, establishing them after an area became denied proved difficult and often produced inconsistent results. Still, the mere fact that Generals such as Douglass MacArthur and Dwight Eisenhower actively sought to capitalize on existing resistance networks in the Philippines and in France, respectively, indicates that irregular warfare even benefitted the overwhelmingly traditional military power of the Allies before and during the conflict. Though many lessons, both positive and negative, can be gleaned from their efforts, each offers an indication of how irregular forces can support traditional forces in war.

#### **A. THE U.S. ARMED FORCES IN THE PHILIPPINES: NORTH LUZON AND THE FILIPINO RESISTANCE**

When U.S. forces withdrew from the Philippine Islands in 1942 at the outset of World War II, a small number of Americans remained behind. These Americans were authorized by their respective commands to develop and employ a Filipino resistance network against the Japanese occupiers.<sup>150</sup> After a long effort to organize and reestablish

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<sup>150</sup> Department of the Army, "Reports of General MacArthur: The Campaigns of MacArthur in the Pacific, Volume I," Reports of General MacArthur, June 2006, 300–304, <https://history.army.mil/books/wwii/MacArthur%20Reports/MacArthur%20V1/index.htm>; Russell W. Volckmann, *We Remained: Three Years Behind The Enemy Lines in the Philippines* (New York, NY: W.W. Norton & Company Inc., 1954), 41–42.

communication with their commanders, these guerrilla forces eventually provided information for allied forces in advance of their landing in the Philippines and supported offensive operations after the fact.<sup>151</sup> These irregular forces stand as an example that, despite all the assets at the disposal of America's conventional forces, irregular forces can still be quite valuable, especially in a fight where relative parity exists between the two sides. However, given their struggle to organize under Japanese occupation and communicate with allied commanders, they also provide a warning that, if irregular forces might be needed, it is better to build them in a more permissive environment, rather than in a denied area after a crisis when they are needed most.

Despite being established in a hostile environment, the United States Armed Forces in the Philippines, North Luzon (USAFIP-NL) exemplified the utility of a resistance network and demonstrated numerous ways that an irregular force can be an asset to a traditional one. While the USAFIP-NL sought to execute effective disruptive attacks in the years before the American landings on Luzon, they also provided value to the Allies as they planned their landing and future offensive operations in the Philippines. It is this mindset, one of execution of the present mission while simultaneously planning for possible future roles in conjunction with conventional forces, that truly captures how the irregular approach can be scaled from extremely limited involvement to full-scale conventional intervention. The utility in adopting a networked and scalable irregular approach to competition is in its ability to influence the competitive environment and the conflict phase simultaneously. With ready irregular forces, the United States, should conflict occur, can call upon those forces to support future operations without needing to generate them after the fact, as has been done more often than not in the past.

In the case of the Philippines, ten hours after the bombing at Pearl Harbor, the Japanese began their invasion of the islands. In a campaign that culminated in March 1942 with the withdrawal of American forces, including General MacArthur, out of the need to

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<sup>151</sup> Peter T. Sinclair, "Men of Destiny: The American and Filipino Guerillas during the Japanese Occupation of the Philippines" (Fort Leavenworth, KS: School of Advanced Military Studies, United States Army Command and General Staff College, 2011), <https://apps.dtic.mil/dtic/tr/fulltext/u2/a558187.pdf>.

preserve combat power and reconsolidate resources for the war in the Pacific.<sup>152</sup> However, across the Philippines, pockets of Americans refused to surrender to the Japanese, and often with approval and encouragement from their commanders, they escaped capture and joined the already active Filipino resistance.<sup>153</sup> On the whole, the Filipino resistance succeeded in preventing Japanese control across the majority of the country. One such successful operation was led by Colonel Russell Volckmann, who escaped on the eve of surrender in April of 1942 and journeyed from Bataan to join a resistance organization in North Luzon. Volckmann, who had served as the Executive Officer for the Filipino 11th Infantry Regiment would, eventually become the commander of the USAFIP-NL.<sup>154</sup> While there are numerous tactical-level lessons about the organization of a resistance movement and execution of guerrilla warfare, the most relevant element of USAFIP-NL's success for this study is the degree to which they impacted future allied operations. The USAFIP-NL succeeded in setting favorable conditions in advance of the allied landing, providing accurate intelligence to follow on allied forces, in seizing critical objectives in support of future operations in the Philippines, and in operating alongside conventional forces in combined operations.<sup>155</sup>

By coordinating disruptive guerrilla operations, the USAFIP-NL greatly increased the likelihood of a successful and unchallenged landing in the Lingayen Gulf in January 1945. In advance of the allied landings Volckmann directed an effective guerrilla campaign characterized by sabotage, subversion, raids, and intelligence gathering designed to “erode Japanese combat power before the Americans arrived to retake North Luzon.”<sup>156</sup> The USAFIP-NL operations, which targeted the Japanese logistical system and transportation infrastructure, effectively distracted the attention of the Japanese forces from defending the

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<sup>152</sup> Department of the Army, “Reports of General MacArthur: The Campaigns of MacArthur in the Pacific, Volume I,” 1966, 19–21, <https://history.army.mil/books/wwii/MacArthur%20Reports/MacArthur%20V1/index.htm>.

<sup>153</sup> Russell W. Volckmann, *We Remained: Three Years Behind The Enemy Lines in the Philippines* (New York, NY: W.W. Norton & Company Inc., 1954), 41–42.

<sup>154</sup> Mike Guardia, *American Guerrilla: The Forgotten Heroics of Russell W. Volckmann* (Havertown, PA: Casemate Publishers, 2010), 20–22.

<sup>155</sup> Peter T. Sinclair, “Men of Destiny,” 6.

<sup>156</sup> Mike Guardia, *American Guerrilla: The Forgotten Heroics of Russell W. Volckmann*, 129.

perimeter of the island while also degrading the readiness and capability of the defending force. This gradual erosion of readiness and focus on the defense prompted the Japanese to withdraw their forces to the interior of the island to prepare a defense in the mountainous terrain.<sup>157</sup> While this impact would later require difficult operations in the mountainous terrain to defeat Japanese forces in North Luzon, it set favorable conditions for a successful allied landing and subsequent build-up of combat power and logistical capability.<sup>158</sup>

To gather accurate and valuable intelligence, Volckmann created a network of supportive local Filipinos, and by utilizing this auxiliary network, the USAFIP-NL provided strategic intelligence that informed critical aspects of Southwest Pacific Allied Command's (SWPA) planned invasion. Volckmann, having only reestablished communications with SWPA and MacArthur's headquarters in September of 1944, provided a recommended landing site based on observed Japanese movements throughout the latter half of the year.<sup>159</sup> Because the Japanese withdrew the majority of their forces from the perimeter of North Luzon and established entrenched defensive positions in the mountains, Volckmann sent SWPA a message recommending Lingayen Gulf for the landing site, as it would be relatively undefended.<sup>160</sup> On 9 January 1945, Volckmann received word that the Allies had landed in the vicinity of Lingayen and faced relatively little resistance.<sup>161</sup> In this case, intelligence operations organized and coordinated by the USAFIP-NL over the course of 1944 contributed to the formation and execution of the larger plan.

Because the allied landings also occurred amid ongoing Japanese efforts to relocate their forces to the interior, resistance forces in South Luzon, in an effort to provide time

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<sup>157</sup> Mike Guardia, 130.

<sup>158</sup> Bernard Norling, *The Intrepid Guerrillas of North Luzon* (Lexington, KY: University Press of Kentucky, 2005), 213.

<sup>159</sup> Russell W. Volckmann, *We Remained: Three Years Behind The Enemy Lines in the Philippines*, 181–82.

<sup>160</sup> Peter T. Sinclair, "Men of Destiny," 9–11; Russell W. Volckmann, *We Remained: Three Years Behind The Enemy Lines in the Philippines*, 182; Mike Guardia, *American Guerrilla: The Forgotten Heroics of Russell W. Volckmann*, 124–25.

<sup>161</sup> Russell W. Volckmann, *We Remained: Three Years Behind The Enemy Lines in the Philippines*, 182.

and space for the landings, executed a series of coordinated and effective operations to disrupt Japanese efforts to relocate forces and establish effective defensive lines.<sup>162</sup> In MacArthur's own words "roads were torn up, bridges destroyed, mountain passes blocked, and rail and motor facilities sabotaged at every turn to interfere seriously with Japanese troop and supply movements."<sup>163</sup> Though he does not expressly indicate this in his reports, the operations conducted by the guerrillas at a time of extreme vulnerability for the landing force, would likely have allowed the Allies to maintain the momentum of their offensive operations in Luzon. The allied forces landing at Luzon were able to consolidate their force and build combat power while the guerillas maintained pressure on the Japanese forces.<sup>164</sup> This ability by irregular forces to disrupt the enemy at a time of extreme vulnerability for conventional forces provides yet another clear example of the benefit that irregular forces can provide to the main effort in traditional warfare.

After the Allies landed in Lingayen Gulf, the USAFIP-NL was reassigned to the Sixth Army and turned their operational attention to offensive operations designed to defeat Japanese forces that were now entrenched in the mountains. Such operations lasted from January until August of 1945 and required the decentralized efforts of all of Volckmann's district to achieve strategic results. Because of the collective knowledge within his ranks of the location of enemy positions, Volckmann made arrangements and established rudimentary communication procedures with the 308<sup>th</sup> Bomb Wing for his guerrillas to direct aircraft in the bombing of Japanese defenses in the mountains.<sup>165</sup> Later, these elementary techniques developed further as Volckmann outfitted his guerrillas with two-way radios to talk directly with the pilots overhead.<sup>166</sup> The coordination between the air and ground elements allowed for much more effective assaults on enemy positions. Among the first efforts at forward air control, these efforts proved an effective means of softening

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<sup>162</sup> Department of the Army, "Reports of General MacArthur: The Campaigns of MacArthur in the Pacific, Volume I," 321.

<sup>163</sup> Douglass MacArthur, 321.

<sup>164</sup> Mike Guardia, *American Guerrilla: The Forgotten Heroics of Russell W. Volckmann*, 130.

<sup>165</sup> Mike Guardia, 127–28.

<sup>166</sup> Mike Guardia, 138.

Japanese defenses as the USAFIP-NL guerrillas moved to execute their final assaults. These methods, created between guerrillas and the Army Air Force pilots, also contributed to the future of air-to-ground coordination, and provide another example of the effectiveness of combining American technological and traditional military advantage with irregular forces operating with an intimate knowledge of the area.<sup>167</sup>

Notably, the offensive to reestablish allied control of North Luzon consisted of a coordinated effort between conventional and irregular forces, with guerrillas executing strategically vital operations in support. The U.S. I Corps began offensive operations from the south, which allowed the USAFIP-NL operational freedom to attack fortified Japanese positions in the Lepanko-Mankayan region, an area of great strategic importance to the Japanese because of its rich resources, concentration of Japanese arms and ammunition reserves, and position along the primary avenue of approach to Ifugao, where the Japanese had intended to make a last stand if necessary. With the I Corps offensive dividing the attention of the Japanese forces, the USAFIP-NL executed operations that more closely resembled combined arms maneuver than the commonly held perception of guerrilla operations. In conjunction with artillery fires and the demolition of critical bridges, Volckmann's guerrilla forces attacked the Japanese in the region and quickly seized the initiative. Although the Japanese fended off numerous attacks, the USAFIP-NL culminated their offensive with coordinated air strikes, a mortar barrage and subsequent assault on the remaining Japanese positions. Ultimately, the guerrillas seized the objective on 20 July 1945 thereby eliminating one of the most fortified Japanese positions and controlling a considerable supply of their weapons and ammunition.<sup>168</sup>

In another area of North Luzon, Volckmann identified an opportunity to both deal a severe blow to Japanese air power and secure a critical strategic asset for allied use in future operations: the airfield at Ilocos-Tangadan. Volckmann directed one element of the USAFIP-NL to seize the airfield in February of 1945. By 9 February 1945, only one month after the allied landings at Lingayen Gulf, the guerrillas secured an airfield behind enemy

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<sup>167</sup> Colin Minor, "Filipino Guerilla Resistance to Japanese Invasion in World War II," *Legacy* 15, no. 1 (2015): 8.

<sup>168</sup> Mike Guardia, *American Guerrilla: The Forgotten Heroics of Russell W. Volckmann*, 134–37.



lines. Accomplishing this provided the Allies with an air strip to support future bombing of the Japanese throughout the Pacific and greatly improved the logistical efficiency in resupplying the Sixth Army and the USAFIP-NL.<sup>169</sup>

Further exemplifying the capability of a well-trained and organized irregular force, a separate element of the USAFIP-NL succeeded in ridding the primarily defensive Japanese forces of their best mobility asset, the tank. As the American I Corps attacked from the south, the Japanese, in an effort to relocate their heaviest weapons to aid in the defense, mobilized their armor to reinforce the southern defensive lines. However, elements of USAFIP-NL had concentrated their efforts along the major high-speed avenue of approach most likely to be used by armored assets, and, using anti-armor weapons, destroyed the Japanese armored column, eliminating a critical enemy asset.<sup>170</sup>

The ability of USAFIP-NL to integrate with conventional forces and the larger campaign plan remained evident throughout the duration of the conflict.<sup>171</sup> Based on the example of the USAFIP-NL, it is clear that irregular forces can provide tremendous benefit to more traditional forces, even those powered by large, modern and capable armies, navies and air forces. First, as evident from USAFIP-NL's activities ahead of the allied landing in Lingayen Gulf, irregular forces can disrupt the enemy to such great effect as to allow a larger invading force the time and space to do so relatively uncontested. Additionally, the pressure of such action can potentially be sustained until such time that the landing force has consolidated and is prepared to commence its offensive operations. Second, irregular forces can provide accurate intelligence combined with a local knowledge of routes, terrain and local population that has the potential to reduce friction in a combat environment. This was seen in Volckmann's ability to recommend an adequate landing site where the Allies would face relatively little resistance. Additionally, the USAFIP-NL continuously provided information that allowed allied aircraft to more accurately target Japanese forces in prepared defensive positions in North Luzon. Third, as the fight shifts toward traditional

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<sup>169</sup> Colin Minor, "Filipino Guerilla Resistance to Japanese Invasion in World War II." Mike Guardia, *American Guerrilla: The Forgotten Heroics of Russell W. Volckmann*, 139–40.

<sup>170</sup> Mike Guardia, *American Guerrilla: The Forgotten Heroics of Russell W. Volckmann*, 141–42.

<sup>171</sup> Peter T. Sinclair, "Men of Destiny," 46.

warfare, irregular forces can be used in conjunction with conventional forces to great effect. The USAFIP-NL provided numerous examples of successful operations where U.S. Army conventional units participated in support of or supported by guerrillas. The benefits provided by the Filipino guerrilla forces in retaking North Luzon are but one example and justification for the United States to commit to a more comprehensive and networked irregular approach to GPC.

In no way do Volckmann and the USAFIP-NL's achievements in North Luzon mean that irregular forces will always be successful. Several factors must be understood so that appropriate conditions can be set to increase the effectiveness of the irregular approach. First, the United States Army had been present in the Philippines in advance of the Japanese invasion. Many of the men who remained in the Philippines had worked with Filipino military forces in the past. Second, though Volckmann is critical of the Filipino conventional forces at the beginning of his memoir, the training and military collaboration with American partners cannot be discounted. This should encourage the United States to engage with local forces and populations in important areas during the renewed era of GPC. Third, no communication method had been preestablished, and it took years for the USAFIP-NL to regain communication with SWPA. Contingency means of communication, especially now in the era of vastly superior communications technology, must be considered when irregular forces are adopted. Such consideration will increase the relevance and value of irregular forces.

## **B. THE JEDBURGHS AND THE FRENCH RESISTANCE — IRREGULAR WARFARE IN FRANCE**

General Eisenhower, in need of a way to harness the potential of the French Resistance, sent small teams of American, British and French soldiers, dubbed the Jedburgh teams, into France ahead of the allied invasion of Normandy. His planned use of resistance forces and guerrilla warfare in conjunction with a large conventional campaign further indicates historical recognition of conventional forces' utility for an irregular supporting effort. However, the manner that the Jedburgh teams were employed also provides evidence that irregular forces need time and effective means of communication to be most effectual. In the French case, despite being designed for use from the outset of

the Normandy invasion, flaws in the employment of those forces provide critical lessons for their future efficacy in operating with conventional forces.

The allied employment of the Jedburgh teams, three to four men inserted into France to organize the resistance and conduct guerrilla warfare against the German occupiers, yields several important distinctions from the USAFIP-NL. First, Eisenhower recognized the potential benefit offered by the French Resistance and included their activities in the larger plan for the invasion of France. Second, despite this positive recognition of the capability of irregular warfare in the planning stages, the Jedburgh teams, for primarily political reasons, were not infiltrated into France until 5 June 1944, only one night prior to the landings at Normandy.<sup>172</sup> The short time frame presented many of the teams with problems too complex to be overcome. In the end, the experience of the Jedburgh teams in France offers one positive aspect, the inclusion of irregular forces in a largely traditional military operation, but one negative aspect, the failure to insert such teams early enough to train, organize and direct forces toward the strategic mission.

In the planning phase for the Normandy invasion, Eisenhower, the Supreme allied Commander, recognized the presence and potential of the French Resistance. With estimates placing the number of resistance forces near 100,000, Eisenhower sought to employ the *Maquis*, French guerrilla fighters, to disrupt German movement and logistics behind their forward line of troops. In order to accomplish this, the Allies included the Jedburgh teams as part of the invasion plan to link up with resistance forces and direct a guerrilla warfare campaign in support of the main allied invasion.<sup>173</sup> The plan essentially sought to use allied soldiers as liaisons to the already existing French Resistance forces; their task was to execute guerrilla operations with the *Maquis* that would support other ongoing allied operations.<sup>174</sup>

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<sup>172</sup> Benjamin F. Jones, *Eisenhower's Guerrillas: The Jedburghs, The Maquis & The Liberation of France* (New York, NY: Oxford University Press, 2016). Prologue;

<sup>173</sup> Benjamin F. Jones. Prologue; Colin Beavan, *Operation Jedburgh: D-Day and America's First Shadow War* (New York, NY: Viking Penguin, 2006), 35–36.

<sup>174</sup> Benjamin F. Jones, *Eisenhower's Guerrillas: The Jedburghs, The Maquis & The Liberation of France*. Prologue; Will Irwin, *The Jedburghs the Secret History of the Allied Special Forces, France 1944*, 1st ed. (New York: Public Affairs, 2005), xvii.

Eisenhower's identification of the potential of irregular warfare to aid the invasion underscores the notion that irregular warfare can support traditional warfare and that these two forms of warfare are not mutually exclusive. Instead, commitments to employing an array of modalities can contribute to the overall success of the operation. If a commander facing the monumental task of invading Normandy can recognize the utility of irregular forces, then it should be equally considered in the modern era of GPC. However, simply because Eisenhower wanted to utilize the Jedburghs to maximize the potential impact of the French Resistance does not mean that this endeavor proved entirely fruitful. While some teams enjoyed success, others failed to accomplish meaningful support of allied objectives.

The critical component necessary for achieving strategic results was the amount of time allotted the Jedburghs on the ground with the Resistance. Though not necessarily the fault of Eisenhower, as political considerations delayed the infiltration of the Jedburghs, the decision not to insert the teams until the night prior to D-Day minimized the influence that the allied advisory teams could have on the direction of resistance operations. In cases where the Jedburghs joined with well-organized and prepared elements of the Maquis, tactical operations succeeded and proved relevant to the strategic objectives of the invasion. However, where the Resistance was not fully developed nor harbored an ulterior political motive for its operations, the Jedburghs generally failed to marry their operations to the larger allied strategic picture.<sup>175</sup>

For example, in Brittany, where the French Resistance was fairly unified, the Jedburgh teams were much more effective. However, the reason for this success had less to do with the skill of the Jedburgh teams than with the existing unity and organization of the resistance in those particular areas. The more significant teams were inserted into areas where less competition among resistance groups existed, making it easier for the adoption of the allied mission. Because of this, the Maquis only needed the Jedburghs to act as liaisons, providing objectives that synchronized with the larger allied plan. So, in those

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<sup>175</sup> Benjamin F. Jones, *Eisenhower's Guerrillas: The Jedburghs, The Maquis & The Liberation of France*. Epilogue.

cases, the French Resistance was less dependent on the Jedburgh teams for organization and training of guerrilla forces, needing only actionable targets to remain relevant to the allied invasion.<sup>176</sup>

Conversely, in and around the Normandy region of France, meeting Eisenhower's intent of disrupting German reinforcement and resupply capabilities proved difficult. The most prominent reason for this was the fractured nature of the local bands of Maquis. Three Jedburgh teams, with call signs "Hugh," "Hamish," and "Ian," were inserted into complex situations where competing political interests among the various Resistance groups threatened any operational success. The Jedburghs, facing a poorly unified, yet ready and willing, general population, needed to try to unify the Resistance to maximize their impact. For the teams, problems created by the lack of a cohesive resistance delayed their expected execution of their tactical mission. Instead of focusing on training and equipping the forces or on planning operations, the Jedburgh teams spent valuable time mitigating differences between the competing resistance groups in an effort to unify them.<sup>177</sup>

In addition, even with the fragmentation issue, the unexpectedly large numbers of Maquis could not be accommodated with training and weapons due to the limited time for this to be supplied. This exacerbated the political sensitivities and highlighted the lack of time to appropriately develop the Resistance in France. Those teams that succeeded, generally did so because the resistance was more united and well-developed in their areas of operation. Those teams who struggled were neutered in preference for a hopeful attempt to plug tactical liaisons into ready-made resistance networks. Unfortunately, those networks were not without flaws and drawbacks that affected the overall usefulness of the Jedburgh teams to the wider campaign.<sup>178</sup>

These vignettes of contrasting experiences among Jedburgh teams further demonstrate the larger point about the need to allow adequate time for American advisors to organize and train their partisan forces and to direct them in operations that support the

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<sup>176</sup> Benjamin F. Jones, Ch. 5.

<sup>177</sup> Benjamin F. Jones, Ch. 6.

<sup>178</sup> Benjamin F. Jones, Ch. 6

larger traditional military campaign. Time should be allowed for adequate assessment of local forces by competent professionals with sound knowledge of irregular warfare. Such professionals can identify gaps in the organization, rifts between various elements, and they can either influence certain parties to embrace the common goal or recommend against partnering with those particular forces. Time is required for this: time for assessment, time for training, and time to develop necessary operating procedures, tactics and techniques. Therefore, the earlier that American irregular operators can engage with local forces, the better.

Even in relatively positive writing about the Jedburghs, such as LTC. (ret.) Will Irwin's *The Jedburghs*, quite a few of the teams are not discussed, likely due to their ineffectiveness. In his book, Irwin conveys the success stories of several Jedburgh teams.<sup>179</sup> His accounts are thorough and well researched; however, he does not endeavor to imagine, as the exercise would be somewhat counter-historical, how the impact of the Jedburghs could have been improved. First, they could have been inserted into France well in advance of the Normandy invasion. Such additional time would have permitted adequate organization and training of resistance forces. Additionally, the appropriate number of weapons and ammunition could have been delivered via airdrop, maximizing the impact of guerrilla warfare in areas where the population aided the Jedburghs. Additional time may have also improved the effective use of guerrilla forces in direct support of conventional forces, as was the case with the USAFIP-NL. Second, the Jedburgh teams could have been better linked via more effective communication. Instead, except in cases where Jedburghs were close to each other, they were linked to higher headquarters via radio communication. This invariably stunted the ability of various pockets of resistance, except those in close proximity, from communicating information and coordinating operations across the theater. Such communication and coordination could have enabled the swarming of German logistical operations and disrupted German operations far more effectively. Such an assessment of the untapped potential is captured in the Epilogue of Irwin's book as he quotes a British member of the Jedburghs, Sir James R.H. Hutchinson, who would

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<sup>179</sup> Will Irwin, *The Jedburghs*.

later serve as the British Under-Secretary of State for War: “Jedburgh teams were more than justified. The pity is that more were not sent sooner as was requested. The maquis wanted them and asked for them...allied officers were recognized immediately as having and offering views unbiased by French internal questions; they could have no axe to grind. The Jedburgh conception was truly founded. It was, alas, not used to the full.<sup>180</sup>

### C. CONCLUSION

Irregular forces can and have provided key benefits to traditional forces at the commencement of hostilities. Therefore, the choice in GPC does not need to be between investment in irregular approaches and conventional military power. Rather, investment in irregular warfare can feed into the eventual plan for the introduction of conventional forces. It would be wasteful to build relationships with local forces to employ a resistance movement during the competition phase only to reverse course and abandon the irregular approach altogether in preference for the traditional military activities during open conflict.

Therefore, in keeping with the need for a networked approach to GPC, irregular warfare leaders must plan for escalation from the beginning of American involvement. While seemingly planning for irregular warfare to fail, it is actually this preparation that makes irregular warfare efforts in the competition phase transferrable to conventional forces in the event of war. Planning for escalation of this sort should be done from the beginning, concurrent with any other type of irregular warfare. Such efforts prepare resistance forces for future employment in support of conventional forces.

During that planning, adequate preparations should be made continuously to provide viable options for future indigenous support for conventional operations. As Volckmann did in a denied area, these preparations should include the development of an intelligence network, communication systems, contact procedures, infiltration routes, safe areas, logistical networks, etc. Anything that could be called upon to support future operations by indigenous or irregular forces or the U.S. military should be considered throughout the campaign. With these considerations, America’s irregular approach to GPC

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<sup>180</sup> Irwin. Epilogue.

becomes useful if planning for escalation in traditional conflict fails. Even if the irregular approach fails to adequately shape the competition phase or prevent open war, the necessary groundwork that supports the combat environment will have been laid.

By doing this, a comprehensive, networked irregular approach achieves the characteristic of scalability and modularity. What may begin with a handful of troops practicing the irregular approach could grow to a larger effort to train and employ irregular forces. That effort could grow more still into a conventional operation with irregular forces supporting the wider war effort. This is how irregular warfare remains relevant for conventional military operations. Even though the larger fear that the United States' conventional military will not maintain its edge, must be addressed, irregular warfare can aid in tipping the balance in future conflicts.

In sum, the contrasting cases of the use of irregular warfare to support traditional warfare offer insight into best practices for the integration of irregular and conventional forces. First, American advisors of irregular forces should plan for escalation from the outset of the campaign so that they are immediately relevant in the war effort. In the case of the USAFIP-NL, this did not occur, and leaders like Volckmann spent many months developing reliable resistance networks under Japanese occupation. Second, engagement of irregular forces prior to conflict can allow adequate networks to form. If this engagement before a conflict does not occur, it is equally important for traditional commanders to exercise patience as the irregular network is validated in a denied environment. As evidenced in the Jedburgh case, a late infiltration can cause teams to depend more on the existing resistance organization rather than on the skills of the advisor. As such, this strategy relied on luck for success rather than on the ability of advisors in organizing for and executing guerrilla warfare. Third, while working with irregular forces, effective communication should be established between the irregular and traditional forces so that appropriate actions can be synchronized between both elements. In Volckmann's case, the establishment of communication took two years. His organization would likely have been better served with consistent and reliable communication with SWPA. Fourth, American irregular advisors and their forces should plan and recommend the best ways for their integration into conventional operations. This allows the irregular forces to convey their



strengths to conventional forces and, as in the case of USAFIP-NL, for the development of combined operations that capitalize on each other's strengths. All told, an irregular approach that considers and prepares for the possibility of escalation to traditional conflict serves the United States during the competition phase and contributes to success in the conflict phase as well.

## VI. CONCLUSION

With the publication of the 2017 National Security Strategy and the 2018 National Defense Strategy, the United States has declared a renewed focus on GPC. In response, each armed service branch has sought to prepare for major power war, under the assumption that competition breeds war. However, an effort to prepare for advanced large-scale military engagement solely focused on preparing for conventional combat, rather than competition, constitutes an incomplete strategy. Though the notion of competition conjures visions of a major war between superpowers, the emphasis placed on competition in the NSS and NDS requires the United States generate a complete concept of how it intends to compete. American efforts to bolster U.S. conventional forces or large-scale military concepts, while necessary in the event of war, do little to affect the current competitive environment. These new approaches to competition are slowly shaping the overall environment because America's adversaries have developed irregular strategies to successfully circumvent American traditional military power.

Though it clearly cannot represent the full thrust of American strategy during GPC, American irregular warfare can shape this current era in critical ways, most notably by imposing costs on America's competitors in areas important to them, and by strengthening allies and partners by preparing forces that are resilient and resistant in the face of external threats. In fact, on a smaller scale, the goals of irregular warfare parallel the goals of GPC. In the latter, nations seek to improve their geopolitical position by weakening opponents by imposing costs without sparking escalation and by expanding their influence to enhance their own status. In parallel, though more localized, irregular warfare seeks to impose cost through non-standard means without exposing the nation to the potential of traditional conflict, or by expanding influence in pursuit of an individual national or strategic objective. Stated simply, individual irregular operations around the world can aggregate to form the collective irregular strategy for competition between great powers. Irregular warfare, applied selectively and appropriately, can help the United States maintain the international order that has allowed free nations to thrive. There are three primary ways

where irregular warfare can influence GPC: disrupting its adversaries' pursuits, expanding its sphere of influence and in preparing irregular options in the event of traditional conflict.

First, irregular warfare can shape the competitive space by disrupting the efforts of America's adversaries through the intentional generation of difficult problems for its competitors in areas where they have signaled national interest or commitment. These efforts could range from supporting resistance activities, as illustrated by U.S. support to the mujahedin in Afghanistan in the 1980s, to information operations, influence operations, or cyber operations designed to foment an untenable public sentiment in a particular country. A potential modern application can be found in Syria, where Russia and Iran have both invested heavily, signaling their interest in the survival of the Assad regime. Given the United States' unwillingness to commit to a long-term investment and the fragile and fractured population, Syria is a place where U.S. irregular warfare could be used to impose costs on an adversary as it attempts to stabilize its ally. Actions in Syria, as was the case in Afghanistan in the 1980s, could be designed in such a way to limit American direct involvement while also draining Russia and Iran of financial and military resources. This model could be tailored to appropriately fit other situations globally in a coordinated, but decentralized effort, to overwhelm America's competitors in their attempts to roll back the status quo.

Second, the use of irregular warfare can help the United States expand its sphere of influence by strengthening and solidifying partners and allies that are under threat from America's great power adversaries. To accomplish this, the United States can utilize the framework and model of FID which, among other successes, eliminated the communist insurgency in Bolivia in 1967 and significantly reduced the reach of Abu Sayyaf Group in the post-9/11 Philippines. However, instead of focusing on internal threats, this type of irregular warfare would be designed to build "resilience and resistance" within a nation's borders. The intent of these efforts would be to harden a partner nation's population to external subversive efforts designed to weaken the state and separate it from Western influence. Additionally, in areas where the external threat is deemed particularly high, the United States can begin openly developing resistance forces to dissuade that action if possible, and to resist occupation if necessary. In either case, the United States grows its

sphere of influence, signals its interest through overt investment in allies and partners, and creates difficult challenges for other great powers by preparing resistance to their subversive or offensive actions.

Third, while executing the two aforementioned versions of irregular warfare, the potential for traditional conflict should be actively recognized; planning for this potentiality will make irregular warfare relevant to the traditional military services and will avoid the mediocrity found during WWII. In light of this, the small units conducting these operations should develop plans and contingencies for the use of their partnered irregular or professional forces to support future conventional operations. In the case of WWII, in both France and the Philippines, irregular forces were generated after the fact to support the needs of the Allied powers. In France, Jedburgh teams achieved varying degrees of success, but they were inserted too late to truly affect the structure and effectiveness of their resistance organizations. As a result, their success depended upon the degree of development and already established effectiveness within their partnered organizations. Developing these forces ahead of time, instead of creating them during a crisis in a non-permissive environment, will make them more easily employed and avoid excessive risk. By contrast, Russell Volckmann did succeed in creating guerrilla forces in North Luzon, Philippines during World War II, but it took him years in the non-permissive environment of Japanese occupation. Still, his organization succeeded both in disrupting Japanese forces prior to the introduction of American conventional forces, and in operating in conjunction with those conventional forces to defeat the Japanese in North Luzon. While the case of the Jedburghs demonstrate the need for planning ahead of the need for irregular forces, the case of the USAFIP-NL demonstrates that irregular forces can effectively support conventional operations, before and after their introduction to the theater. Even during these initial phases of GPC, all planning for irregular operations should consider a trajectory that includes escalation to war.

As evidenced through historical cases, American irregular warfare has shown itself capable of shaping permissive, semi-permissive and non-permissive environments in positive ways. In the non-permissive environment of Afghanistan in the 1980s, the United States supported resistance activities in an effort to disrupt Soviet activity there. In the end,

the Afghan mujahedin, supported by the United States, expelled the Soviet superpower in 1989 and imposed significant economic, political and reputational costs that contributed to the eventual downfall of the U.S.S.R. Through its military and paramilitary organizations which are well-versed in irregular warfare, the United States can achieve similar results in appropriately selected environments. In fact, the U.S. Army Special Forces and the CIA's paramilitary forces were developed during the Cold War for exactly this purpose. However, instead of being asked to solve difficult problems like terrorism and insurgency, they would be asked to create difficult problems that would stifle the progress of America's adversaries. Without getting into detailed planning, this may include sponsoring and directly supporting resistance activities, as occurred in Afghanistan, creating negative perceptions through information warfare, and disrupting partnerships by shedding light on predatory lending practices. Candidate locations for this type of activity range from Syria, where relationships with resistance organizations endure, to Africa, where instability dominates and other great powers appear ready to invest. How these forces can be used, and the problems that they can create in specific areas in order to shape the overall competitive space, is only limited by creativity.

In more permissive environments like Bolivia in 1967 and the post-9/11 Philippines, the United States developed security forces that successfully thwarted irregular threats from a communist insurgency in Bolivia and terrorism in the Philippines, leading to better internal stability. Irregular warfare can be used to develop similar concepts and programs aimed at countering great power subversive or irregular activities within the borders of an American partner or ally. An appetite for such activity has already been signaled in the Baltics and in Eastern Europe, given the creation of preparatory national resistance to external actors' movements.<sup>181</sup> Preparing formal security forces for incursions or informal networks of resistance, whether violent or subversive, could prove effective both in solidifying the American supported liberal international order, and in preventing future aggressive Russian activity in Crimea and Ukraine.

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<sup>181</sup> Nick B. Israel, "Resistance, Resilience, and Everyday Citizens as an Element of National Power," *Special Warfare* 32, no. 3 (December 2019): 22–25.

The special operations community is the one most likely to execute irregular warfare during GPC, and its leaders are debating how best to remain relevant in this era. Designing irregular warfare in the manner described here will constitute a better way to use this capability. In order to remain a part of the larger plan, some SOF leaders have conceded that a Special Forces Detachments primary responsibility is to “observe and report.” Others have argued that SOF will be most useful conducting strategic reconnaissance and, at the appropriate moment attacking hard targets to support greater conventional operations.<sup>182</sup> However, this perspective is short-sighted, and captures only a momentary snapshot of SOF in large-scale combat operations.

Instead, by viewing SOF’s role in GPC along the irregular warfare continuum described above, those forces can shape competition and prepare these options for war. During the competition phase, irregular warfare seeks to maintain the status quo and avoid war by preserving American dominance. However, in recognition of the potential for war, irregular warfare allows for the preparation of irregular options, which have always been desired in war, to achieve victory should that war come. This irregular strategy for GPC will still fit with other parallel governmental and military efforts and, taken holistically, will give the United States a distinct edge in maintaining the advantage during GPC and related conflicts.

### **Recommendations:**

#### (1) Small, Agile, and Purpose-Built Elements

The elements selected to perform irregular warfare missions should remain as small as possible, while still maintaining mission management. Contrary to some of the successful operations in the aforementioned case studies, special operations now have hefty headquarters elements that contribute to inefficiency by holding significant capabilities at higher echelons. Going forward, the United States should avoid cumbersome headquarters

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<sup>182</sup> Hal Brands and Tim Nichols, “Special Operations Forces and Great-Power Competition in the 21st Century,” *American Enterprise Institute - AEI* (blog), August 4, 2020, <https://www.aei.org/research-products/report/special-operations-forces-and-great-power-competition-in-the-21st-century/>; Brandon Turner and Paul Bailey, “The Joint Force–SOF Relationship: Support Roles in the Resurgence of Great Power Competition,” *Marine Corps Gazette*, January 2020, <https://mca-marines.org/wp-content/uploads/The-Joint-Force%E2%80%93SOF-Relationship.pdf>.

over single missions, and instead rely on regional task forces to oversee multiple missions. This allows small, individual missions within individual countries to be purpose-built. Instead of selecting elements from a single unit, or even a single department, the U.S. military should adopt the practice of forming teams based on the needs of specific missions. While difficult, because American irregular units are organized according to line and block charts, all missions are unique and, especially during competition with great powers, require teams that are tailored to succeed.

While simply selecting a company of special operations personnel to tackle a problem is tempting, it would be more appropriate and more beneficial to allow one small team to create its own miniature task force, drawing on capabilities that will prove critical in the future. With the reemergence of information warfare, political warfare, unrestricted warfare, and hybrid warfare, American irregular warfare must expand to include a wider array of these capabilities and be able to leverage them more quickly and efficiently. This occurs by keeping elements small, with no excessive headquarters element, and encouraging them to form cohesive conglomerations of capabilities. Though this will differ according to each mission's needs, this may include capabilities like cyber, psychological operations, civil affairs, legal advisors, and economic and political advisors, to name only a few.

However, the United States military already builds large task force headquarters according to the needs of the mission. These headquarters do not allow the tactical and operational units the flexibility and agility to employ them appropriately. Instead, they labor at larger headquarters and are frequently held up by systems and processes that must filter all the way down the chain of command. In the small, agile, purpose-built model proposed here, those capabilities are pushed down where they can be utilized more quickly and where they will be encouraged to be an important part of the unit of action. Oversight is still necessary and will still be present, albeit at a more strategic level with less organizational infrastructure in the middle.

(2) Think in Terms of Campaigns, Not Missions

Given that the United States is still at the outset of developing its GPC strategy, it will be important for leaders and policy-makers at all levels to think in terms of campaigns rather than individual missions. As evidenced in the case studies on World War II, Volckmann in the Philippines and the Jedburgh Teams in France, preparation for the use of irregular elements in war is critical for their prospects for success. Because there was no network prepared to resist in the Philippines, Volckmann spent years developing a guerrilla force before truly making an impact at the tactical and operational level against the Japanese in North Luzon. Additionally, the determining factor in the success of the Jedburghs, who were capable operators, rested on the organization of the resistance elements that they encountered on the eve of the Normandy invasion. Instead of repeating these short-sighted mistakes, the United States should consider the trajectory and longevity of its operations as it develops its irregular warfare strategy. It should begin by developing resilience and resistance in its partners, but these preparations should always be focused on the potential utility of those forces in the event of an external invasion or in the event of war between great powers. In the grand scheme of defense spending, investment in a select and appropriate number of these programs can shape the entire campaign of competition and impact future conflict as well.

(3) Identify Appropriate Locations for Each Type of Irregular warfare

Moving forward, policy-makers, researchers, and military planners should leverage regional and irregular warfare expertise to determine locations where irregular warfare is viable and would support American strategic goals. As countries or regions are located and deemed appropriate for irregular warfare, a broad intent can be developed by policy-makers, who would determine what the United States would gain through irregular warfare in a particular location. Once that intent is determined, the remainder of the planning can be done at lower, operational and tactical levels, in keeping with the previously described recommendation to keep units of action small in number but diverse in capability. Of course, the plan would then need to be approved at the strategic level, where limitations and constraints can be imposed if needed. This determination of strategic intent at higher



levels and planning and execution at tactical and operational levels will help keep operations connected to national policy and goals while remaining decentralized and agile in execution.

(4) Capability Focused, Not Unit Focused

Frequently, as operations are considered, the question of “Who is going to take the lead?” inevitably arises. However, based on this research, this appears to be the wrong question. Instead, as evidenced from successful irregular warfare case studies, the question should instead be: Which capabilities are required to best accomplish the stated intent? Commanders and other leaders should be chosen for their ability to identify the intent and create a cohesive team where each of those capabilities is leveraged appropriately. Too often, commanders are chosen because they command a certain or special unit, rather than for their ability to create an effective unit out of personnel from different communities. In many cases, the result has been an organizational structure heavily focused on one capability, rather than on the purposeful application of all capabilities to accomplish the goal. Instead, Special Operations Command should create purpose-built task forces that have been tailored for the operational environment and the intent of the mission. Creating teams built from capability rather than from organizational structure will make them more effective and efficient in the accomplishment of the mission. It will also connect them to the full gamut of national assets, while still allowing decentralized execution in each theater of operations.

(5) Embrace Competition

While the United States typically hesitates in the execution of irregular conflict, a strategy with irregular warfare as a critical component to effectively check great power expansionist efforts and shape the latest iteration of GPC. If the United States fails to demonstrate the same commitment to competing as its adversaries, it will likely have its global leadership and its preferred global order curtailed by the advancements made through the irregular strategies of its chief competitors. Instead, the proclamations made by the NSS and NDS should drive the American military to include irregular strategies in pursuit of competitive advantages.

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