

# PEDAGOGY FOR THE LONG WAR

## Teaching Irregular Warfare

A Joint Conference Sponsored by

**Marine Corps Training and Education Command**

and the

**United States Naval Academy**



29 October – 1 November 2007

Quantico, VA

## CONFERENCE PROCEEDINGS





# **Pedagogy for the Long War: Teaching Irregular Warfare**



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Marine Corps Training and Education Command

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United States Naval Academy

**29 October – 1 November 2007**  
**Alfred M. Gray Research Center**  
**Marine Corps Base Quantico**

## **Conference Proceedings**

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## **Executive Summary**

From 29 October through 1 November 2007, Commanding General, Marine Corps Training and Education Command (TECOM) convened the conference “Pedagogy for the Long War: Teaching Irregular Warfare,” at the Alfred M. Gray Research Center at Marine Corps Base Quantico. The conference’s purpose was to identify specific problems and recommendations for TECOM and attending organizations, with a focus on the conceptual, structural, intellectual, and methodological aspects of teaching and learning skills for the long War, in both the schools and operating forces of the military, and at both the officer and enlisted level. The conference was also intended to introduce the Marine Corps’ new Center for Irregular Warfare to the service and joint community.

“Pedagogy for the Long War” was sponsored by Marine Corps University, the Marine Corps Center for Advanced Operational Culture Learning, and the United States Naval Academy. It brought together over two-hundred participants from joint, inter-agency, international military, and academic backgrounds, and featured forty-five prepared presentations dealing with the core issues of Long War. These core issues included doctrine, leadership, professional military education, company-level training and education, counterinsurgency, information operations, civil-military operations, language and culture, military organizational cultures, and knowledge management.

Subsequent to presentations, working groups developed specific recommendations on these themes. On their specific themes, the working groups generated over one-hundred issues of concern, problems identified, and recommendations for training, education, and doctrine, to be integrated over the next generation of international military learning.

Convergent recommendations included

- Greater emphasis on consistency, principles, and judgment in doctrine
- A better balance between training and education, with more attention to sustained and continuous enlisted and commissioned professional education
- A more thorough-going approach to preparation, assessment, and continued skills development of instructional cadres
- More integration of representatives of the inter-agency into professional military educational settings, along with more opportunity for service people to engage in structured learning outside of the military
- Greater focus on the affective and cognitive aspects of learning Long War skills, to include the cultivation of social and emotional intelligence
- Critical examination of the structures and cultures of services and their educational systems, to ensure that leaders, organizations, and organizational cultures are calibrated to the challenges of the next generation.

“Pedagogy for the long War” demonstrated the vibrancy of an emerging community of practice—joint, uniformed and civilian, and international—that has made many notable accomplishments over the recent year, and has identified needed conceptual, structural, and methodological progress to ensure Long War success.

## **Background**

Throughout its history, the United States Marine Corps has engaged in activities far beyond major combat operations, in both the pre- and post-conflict context. In this way, the Marine Corps has resembled NATO ally forces. Particularly since the end of the Cold War, however, the nature of military operations conducted by conventional forces has evolved: they have become longer in duration and more diverse in location and scope; they also require general purpose forces to perform more specialized tasks, and to distribute these tasks across all ranks and billets. In short, regular forces are conducting activities heretofore considered “irregular.” Given the threats and opportunities facing the United States and its allies currently, this new mission profile is now understood as the “Long War.”

To define unique components of the “Long War” and develop them operationally, the US Department of Defense has gravitated to the concept of “Irregular Warfare.” This has been defined as “a violent struggle among state and non-state actors for legitimacy and influence over the relevant populations. IW favors the indirect and asymmetric approaches, though it may employ the full range of military and other capabilities, in order to erode an adversary’s power, influence, and will.”<sup>1</sup>

Several inter-related activities and skills have been associated with the Long War and Irregular Warfare. These include:

- Civil-Military and Stability, Security, Transition, and Reconstruction Operations
- Information Operations
- Integrated Intelligence Operations conducted by conventional forces and the joint/interagency community
- Unconventional Warfare and Counter-Insurgency
- Joint, Inter-Agency, and Coalition operations
- Foreign Internal Defense and Building Partnership Capacity
- Culture, Language And Region-Focused Skills
- Military Psychology
- Leadership and mentorship at all levels of command for hybrid operations

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<sup>1</sup> See: *Irregular Warfare Joint Operating Concept (IW JOC) Version 1.0*, 11 September 2007, 1.

Some of these capabilities and activities emerge from skills long resident in US forces, though in niche communities. Other capabilities remain under-developed in both conventional and special-purpose forces. The distinctive feature of current and future operating environments of the Long War, however, is that general-purpose, conventional forces will need competency in all of these skills—either in support of special operating forces, or as the main effort. To gain this competency, Marines require full spectrum learning opportunities: sustained pedagogy for the Long War

The foundation for skills acquisition in the Marine Corps consists of training and education at the tactical-through operational level. This training and education is a shared responsibility among schools and units in the Fleet, and the schools and branches of Training and Education Command, to include Marine Corps University. Likewise, though professional military education (PME) does not traditionally include pre-accession learning at the service academies, in the context of the Long War, the US Naval Academy is integral to preparing the next generation of Marine and Naval leaders.

The challenge for Marine Corps and Naval teaching and learning establishments—as for those of our joint and international partners—is to provide the kind of dynamic training and education to officers and enlisted leaders at all levels which both prepares them to demonstrate new skills in ever-diversifying operational environments, and ensures that they also retain traditional capabilities.

Since 2005, a number of conferences and workshops have striven to deal with these issues. Notable ones include the July 2005 Irregular Warfare II Conference, sponsored by Marine Corps Combat Development Command; May 2006 Culture and Language Learning Conference, sponsored by Marine Corps Training and Education Command; the March 2006 Culture Training Summit, sponsored by US Army Training and Doctrine Command; the September 2006 Culture Summit at Air University; the June 2007 Regional and Language Competencies Summit sponsored by the Defense Language Office; and the July 2007 Cross-Cultural Competencies Workshop sponsored by the Air University.

These interactions have been accompanied by ongoing working groups (such as the Navy Language Action Panel), all of which have sustained communication among emerging centers for training and education. By late 2007, there emerged a mature community of practice as well as dialogue among uniformed military members, educators at military institutions, and civilian academicians who focus on developing through education the skills required for success in the Long War.

## **Conference Themes and Topics**

Responding to these conditions and based upon accomplishments of earlier gatherings, Marine Corps University (MCU), the Marine Corps Center for Advanced Operational Culture Learning (CAOCL), and the US Naval Academy invited Naval, Joint, academic, and international specialists on military teaching and learning to participate in a conference which would assess the challenges of training and education for irregular warfare skills; catalogue recent accomplishments; share best practices in the realm of military pedagogy; and introduce TECOM's nascent Center for Irregular Warfare (CIW) to the larger defense educational community. Specific goals of the conference included:

- Encouraging greater cross-pollination among key constituencies who are concerned with the specifically training and education-related aspects of those skills and mental frameworks required in the Long War and in irregular operations.
- Providing a fertile environment for US/international defense practitioners and educators, as well as US/international academicians, to discuss best practices, persistent problems, and recommendations for near-to-mid-term programs and actions in the realm of education and training of benefit to the Fleet and larger defense community over the next 20 yrs.
- Learning for joint, inter-agency, and coalition success over the spectrum of military operations during the next generation is the topic; the activity of the conference is also to be learning: panelists have been prompted to talk about learning (training and education) while in fact learning from the other presenters and attendees.
- Highlighting accomplishments of USMC, and TECOM in particular, through founding CAOCL and CIW, as well as the ongoing development of programs at MCU.
- Focusing on issues of relevance to both the current fight as well as long term multi-theater engagement.

In particular, MajGen George Flynn, Commanding General of TECOM, charged conference planners and attendees to “give me something concrete and useful” that TECOM “can implement in the schools and fleet now and in the future.” This was the primary goal of “Pedagogy for the Long War: Teaching Irregular Warfare.”

“Pedagogy for the Long War” was hybrid in character, seeking to combine the best aspects of an academic conference with those of military and Dept of Defense workshops. Working with the faculty of MCU and USNA, the conference steering committee developed a short list of panel themes, based upon which a call for papers (see Appendix A) was sent out in Spring 2007 to relevant institutions, list serves, and colleagues.

The Steering Committee received approximately eighty-five paper proposals. Based upon number of thematic panels and quality of proposals, the Committee was able to accept just under half for presentation.

The following proposals were accepted for development into presentations:

- 1) “Preparing Officers for the Long War: The Role of Professional Military Education in Producing Paradigm Shifts”
- 2) “Teaching Irregular Warfare: déjà vu All Over Again?”
- 3) “Foreign Security Forces Assistance”
- 4) “Civil Wars vs Insurgencies”
- 5) “The Lessons of Northern Ireland”
- 6) “Educating Counter-Insurgency: The Dutch Experience”
- 7) “On Organized Crime and War: Theory History and Practice”
- 8) “Comprehensive Approach on Teaching Terrorism and Irregular Warfare”
- 9) “Teaching Irregular Warfare: Program Development for the Long War”
- 10) “Planning and Implementing Pedagogy for Irregular Warfare”
- 11) “Operational Knowledge Management”
- 12) “Issues of Concern”
- 13) “The Real Revolution in Military Affairs”
- 14) “Change and Military Culture”
- 15) “...Changing the Way the Military Talks and Thinks about the Long War”
- 16) “Influence of Our Military Culture on What is Taught in PME”
- 17) “Tongue-Tied: Language Lessons for the Long War”
- 18) “Terms of Engagement”
- 19) “A Concept for Operational Language”
- 20) “Influence in the Development of UK Concepts and Doctrine”

- 21) “Information Operations in Irregular Warfare: Understanding the Role of People and Populations”
- 22) “Communicating in an Organized Crime Environment: Theory, History, and Practice”
- 23) “Leadership in the Long War: Developing 21<sup>st</sup> Century Warriors”
- 24) “Studying the Eye of the Storm”
- 25) “Cultivating Leadership in Hybrid Operations”
- 26) “Civil-Military Interaction”
- 27) “Viable Cooperation and Pedagogy for the Long War”
- 28) “Bureaucratic Bilingualism in the New National Security Environment: Which Languages, Which Bureaucracies?”
- 29) “Developing Cross-Cultural Competence in Military Leaders”
- 30) “Where the Rubber Meets the Road, Respectfully”
- 31) “Mapping Cultures and Cultural Maps: Representing and Teaching Culture in the Marine Corps”
- 32) “Adaptability and Creative Decision Making in Irregular Warfare”
- 33) “An Ordinary Superman”
- 34) “A Revolution in Training for 21<sup>st</sup>-Century Combat at the Infantry Officer Course”
- 35) “The First-Deployment Experiences of Ft Carson’s Soldiers in Iraq”
- 36) “Initial Officer Training in the Australian Army”
- 37) “Preparing for Any War – the Search for Effective Professional Education”
- 38) “Teaching Legal and Professional Standards for the Long War”
- 39) “Roman Counter-Insurgency”
- 40) “Inside the Adversary’s Mind: Pedagogy, Empathy, and Insurgency”
- 41) “Guerre Revolutionnaire to National Security Doctrine”

Based on accepted proposals, the following conference panel themes were determined:

- 1) Definitions and Doctrine
- 2) Professional Military Education for Irregular Warfare: Learning and Networking
- 3) Emerging Perspectives in Professional Military Education
- 4) Knowledge Management
- 5) Leadership
- 6) Preparing Tactical Level Leaders
- 7) Culture Learning
- 8) Militaries as Culture
- 9) Language
- 10) Historical Perspectives of COIN
- 11) Present Perspectives of COIN
- 12) Information Operations
- 13) Civil-Military Operations

### **Participant Demography**

In addition to paper presenters, the Steering Committee solicited applications for panel coordinators, as well as discussants, who would read draft papers, facilitate question and answer, and participate in small panel-based working groups to develop concrete recommendations for the end-of-conference outbriefs. Taken together, panelists thus represented a unique occupational, institutional, and international background:

US Military, Active	14	20%
US Military, Civilian Educator (includes retired military)	26	38%
US Civilian Academician	7	10%
International Military, Active	11	16%
Internatl Military, Civilian Educator	11	16%

Keynote speakers were also central to the conference's animating goal of pedagogy as both topic and activity.

- To emphasize the TECOM sponsorship of the conference, **MajGen George Flynn**, CG TECOM, was invited as a keynote speaker to address panelists, charging them at the beginning of the conference with their mission to provide him with “concrete and useful” recommendations by the end of the conference.
- To emphasize the Special Forces aspect of the conference, **ADM Eric Olson**, Commander of Special Operations Command, was invited to speak during one of the morning sessions.
- To highlight the joint and inter-agency aspect, **LTG Dave Barno, (USA, ret)**, Director of the Near East/South Asia Center at National Defense University, was invited to lead the outbrief session and provide closing remarks.
- Finally, to make very clear the conviction that teaching irregular warfare is an international educational effort, **LtGen Sir John Kiszely**, Director of the UK Defence Academy, was invited to speak during the opening morning session.
- Throughout the conference **MajGen Donald Gardner** (USMC, ret), President of Marine Corps University, provided a strong presence, introducing speakers and participating in the closing session.

Additionally, the Conference Steering Committee consisted of Dr Jerre Wilson, Vice President for Academic Affairs at MCU; Dr Barak Salmoni, Deputy Director of CAOCL; Dr Brannon Wheeler, Director of the Center for Middle East and Islamic Studies at the US Naval Academy; Dr Paula Holmes-Eber, Professor of Operational Culture at MCU, and Jeffrey Bearor, Director of CAOCL. Conference Coordinator was Liz Mazarella.

## **Structure and Schedule**

Pedagogy for the Long War combined core elements of an academic conference with those of a military/DOD workshop. In this respect, pedagogy as a topic as well as activity, and the need to produce concrete recommendations for CG TECOM, drove the conference architecture:

- 1) Panel presenters were offered a generous thirty minutes each for formal presentations of prepared papers.
- 2) A subsequent question-and-answer session permitted panel attendees to relate the papers to their own concerns and experiences, providing intellectual as well as programmatic insights back to the panel presenters.
- 3) After panel presentation and Q/A sessions, working groups convened to develop concrete problems and recommendations for presentation to LTG Barno and MajGen Gardner. Working groups for each panel consisted of the panel presenters, the panel coordinator and discussant, and a small number of panel attendees, invited by the panel coordinator to join the working group (five-to-eight participants).
- 4) On the final morning of the conference, panelists joined each other for a breakfast and additional keynote speech, focused on common themes and lessons during the conference, as well as a way ahead to an edited volume.
- 5) For the closing session of the conference, four rapporteurs were chosen from among panel coordinators to synthesize and report the findings of similarly-themed panel clusters. Rapporteurs included Dr Barak Salmoni (CAOCL), LtCol Daryl Campbell (Australian LNO), Dr Kerry Fosher (MCIA), and Col Dan Kelly (CIW).
- 6) LTG Barno then provided a review of the outbriefs, with conclusions and comments for a future agenda.

## Conference Presentations and Main Themes

### **Monday, 29 October: Welcoming Remarks for Panelists**

#### **MajGen George Flynn, CG TECOM**

##### *Salient Points from MajGen Flynn's Comments\**

We are now engaged in ongoing operations that share aspects of conventional and irregular warfare.

- The balancing act is to address these requirements of the current operating environment, while devoting adequate time and energy to educating leaders at all levels for theater security cooperation, engagement, shaping, and all those competencies necessary to Long War success.

Across Doctrine, Organization, Training, Materiel, Leadership and Education, and Personnel and Facilities (DOTMLPF) policies, the major change agents to develop Irregular Warfare/Long War proficiency in our security establishments are doctrine, training, and education.

- Training and education must focus equally on Professional military Education (PME) and Pre-Deployment Training (PTP) in order for these changes to be effected over a generation of leaders.

Properly understood, military education encompasses both the pre-accession service academies/NROTC as well as those institutions traditionally associated with PME.

- The backbone to success will not only be officers, but non-commissioned and staff non-commissioned officers as well.

As the Long War entails general purpose forces engaging in more specialized tasks, the role of training and education is to regularize the competencies associated with Irregular Warfare success.

Though politics might be different, international military practitioners share a commonality of concerns as regards Long War skills.

- The enduring need for “regular” warfighting skills should not be obscured as we direct focus to “irregular” skills
- Solutions cannot be technology-driven, nor should they ignore technological aides
- Planners and commanders need solutions good for both today and tomorrow

\*Throughout this conference *Proceedings*, the editor has elected to retain American, British, and European spelling, punctuation, and citation preferences intact.

**Tuesday, 30 Oct, 0830:**  
**Opening Key-Note Speech**

**LtGen Sir John Kiszely, Dir, UK Defence Academy**

LtGen Kiszely's comments were based on an essay entitled "Post-Modern Challenges for Modern Warriors," published in *Shrivenham Papers* Number 5, December 2007.

*Abstract*

This paper examines the challenges presented to modern warriors by changes in contemporary warfare, and argues that while some of these challenges have been or are being overcome, there are others, particularly those associated with military education and culture, which have yet to be fully recognized, let alone met, and which will require to be so if modern warriors are to be a match for tomorrow's warfare.

*Excerpts from LtGen Kiszely's Comments*

The asymmetric challenges posed to modern armed forces are not new, but they are largely of a different sort: post-modern challenges—challenges that are not primarily overcome with the tools of modernity. Post-modern warfare does not develop in linear fashion; and unlike modern warfare, many of the major challenges it poses are not so much technological, formulaic or mechanistic as conceptual:

- War and peace are not easily delineated; "defeat" and "victory" require definition
- The enemy is not obvious, nor easily identifiable, literally or figuratively, and may change on an almost-daily basis
- Success depends not on destruction of the enemy, but on out-manoeuvring opponents, depriving them of popular support, and winning it oneself
- The contest takes place in a complex civilian environment: "amongst the people"
- The key battleground is in the mind – the minds of the indigenous population, and the minds of regional and world opinion
- Much of this ideological struggle is carried out in the domain of cyberspace
- Time is a key - sometimes *the* key – resource, and one which our opponents are likely to hold in far greater quantity than do we. How the war is fought becomes crucially important to the quality and sustainability of the resulting peace

Four things in particular characterize post-modern military operations: complexity, ambiguity, uncertainty, and volatility.

- They all tend to be "wicked problems"— problems that are intractable and circular with complex inter-dependencies, and where solving one part of the problem can create further problems or make the whole problem greater

Particularly striking is the far greater diversity of roles than is demanded by combat operations alone: for example, state-building, security-sector reform, mentoring and training indigenous security forces, humanitarian assistance, civil administration, law enforcement, exercising political muscle, even social work.

These roles point, in turn, towards the far greater breadth and variety of competencies required, to:

- apply soft power as well as hard, and choose the right one for the right circumstances
- work in partnership with multinational, multi-agency organizations, within a comprehensive approach
- master information operations and engage successfully with the media
- conduct persuasive dialogue with local leaders and opinion-formers
- mentally out-manoeuvre a wily and ruthless enemy
- measure progress appropriately

These competencies require practitioners to have a high level of understanding across a wide range of subjects, including:

- the political context
- the legal, moral and ethical complexities;
- culture and religion
- how societies work
- what constitutes good governance
- the relationship between ones own armed forces and society
- the notion of human security
- the concept of legitimacy
- the limitations on the utility of force
- the psychology of one's opponents and of the rest of the population

The culture and mind-set required for practitioners of post-modern warfare such as counter-insurgency are very different, requiring recognition that:

- the end-state that matters most is not the military end-state, but the political one
- operational success is not achieved primarily by the application of lethal firepower and targeting
- out-manoeuvring opponents physically is less important than out-manoeuvring them mentally
- *dramatis personae* cannot be divided in Manichaeian fashion into “enemy” and “friendly” forces
- very little of the picture is actually painted in black and white

Counter-insurgency, characterized by “wicked problems.” does not lend itself to the reductionist, Power-Point mind:

- the first essential step is spending time understanding the nature of the problem and all its many facets
- to try and develop formulas, templates and `norms` is to misunderstand the nature of the problem; the delivery of rapid and decisive effect is but one means—in many circumstances it may be not only singularly inappropriate, but actively counter-productive
- the wiser counsel is sometimes “don't do something, just sit there!”

An important aspect of this different mind-set or culture required by military professionals concerns their warrior ethos. To be effective at counter-insurgency and stabilization operations, an army needs its members to perceive themselves as something other than, or more than, just warriors. Unless they do, they are liable to apply a warrior ethos, approach and methods, for example exercising hard power when they should be exercising soft power—in Max Boot’s words, “fighting small wars with big war methods.”

Moreover, counter-insurgency possesses features alien to the pure warrior ethos:

- conceptual complexity, ambiguity and uncertainty
- the whole concept of soft power
- political “interference”
- media scrutiny
- “unfair” constraints of rules of engagement which can negate the use of the trump card—firepower.

And COIN requires warriors to acquire some decidedly un-warrior-like attributes which, to some warriors, appear to undermine the warrior ethos on which success in combat depends. Warriors can be highly resistant to any change of culture, for attributes such as:

- emotional intelligence
- empathy with opponents
- tolerance, patience
- subtlety, sophistication, nuance and political adroitness.

It is necessary here to distinguish between training and education.

- Training is preparing people, individually or collectively, for given tasks in given circumstances; education is developing their mental powers and understanding. Training is thus appropriate preparation for the predictable.
- Likely future operations are characterized by unpredictability and challenges that are not so much formulaic and mechanistic as conceptual and “wicked.” For the unpredictable and for conceptual challenges, education is required.
- Post-modern operations feature devolved decision-making where relatively junior commanders are making very senior decisions. The requirement for this education is not, therefore, just a requirement for senior officers.
- All training and doctrine needs to be founded on education. If they are not, the practitioner is liable to lack the versatility to adapt them to changing circumstances or to extemporize. Indeed, doctrine alone “may constrain the ability to ‘think outside the box’ [and]...limit the ability to understand novel situations.”
- Doctrine and training are liable to be only rough guides, requiring the practitioner to possess the ability to spot when and where they are no longer appropriate, and to adapt accordingly. Moreover, adaptability by itself is inadequate; we must also possess the understanding (resulting from education) which will help us to anticipate change.

It is important to recognize the purpose of this education. Its purpose is not the purist one of the pursuit of knowledge for its own sake, but of developing capacity for good judgement.

- Such education has a training dimension in that it is preparing practitioners to exercise good judgement in their profession, but not just in their next job or deployment, but over the duration of their career.
- Its payback should not be judged by the improvement to an individual's immediate performance, but by the value it adds to performance over the course of a career, and in the value added to the organization as a whole over a similar time-span. Judged in this way, professional military education is a direct and essential contributor to operational capability.
- The educational requirement is, thus, far more about teaching officers “how to think” than “what to think.” Developing minds is most decidedly not something that can be achieved as part of pre-deployment training.

A purely military learning environment, in staff colleges, no longer suffices.

- There is a strong argument for military professionals to undertake at least some of their education and training alongside representatives of those other organizations with which they will be operating in future
- A further way of avoiding the effect of the “professional monastery” is for some postgraduate officer education to take place away from the essentially military culture of military academies. However good these academies may be, there is likely to be an institutional culture with the attendant risk of stereotypical thinking which may inhibit thinking “outside the box.”

There is one aspect of developing minds and understanding to cope with the challenges of counter-insurgency that deserves special mention and that is the need to develop cultural understanding—a key element of the contest both in the physical domain and the “severely understudied” ideological one.

- There is a tendency to short-cut the cultural understanding process by focusing on the training challenge: how to behave in dealing with those of another culture; what basic errors to avoid; a smattering of a few handy phrases. We delude ourselves if we believe that a behavioural check-list does anything more than scratch the surface of cultural understanding.
- Consistently under-estimated is the requirement for greater linguistic skills than that provided by the equivalent of a tourist phrase-book.
- Equally important is the requirement for cultural *self*-awareness: understanding our own culture, in particular our cultural inheritance, which may affect how we relate to people of other cultures.

## *Conclusions*

All armed forces need to recognize that reliance on training and doctrine alone as tools for achieving success in post-modern warfare is misplaced, and that an important factor in the process—more important than in modern warfare—is education. Such education needs to focus on the development of minds, and in particular the development of breadth of vision, understanding, wisdom and good judgement.

- Education is required not just for those new to post-modern operations, but also to ensure that those with some experience in these operations do not over-rely on their experience, for example by translating lessons from one campaign to another.
- Militaries should undertake more of their education and training alongside representatives of organizations with which they will find themselves operating in future, not least to gain an understanding of the different organizational cultures.
- To avoid institutional culture and stereotypical thinking, and to inject fresh ideas into the officer corps, armed forces should send a sufficient number of their brightest and best for postgraduate programmes in civilian universities.
- In general, militaries will need more time for professional military education.

All of this is likely to call for a change of institutional culture for some militaries, or within areas of militaries, particularly for those institutions or individuals who see themselves purely as combat warriors.

- The essence of the change of culture is for these combat warriors to come to judge their professionalism by their performance not just in combat, but in all roles they are required to undertake. For some, this requires a redefinition of professionalism.
- Any cultural change within any military is problematic, and overcoming resistance to change may be challenging. And there is a paradox here: where change is required, senior military leaders will need to press it home if it is to sustain; but in some militaries it may be that some of the senior leaders are amongst those most resistant to change.
- There is also a need to ensure that those with an understanding of, and acumen for, post-modern warfare are not side-lined within military hierarchies.

**Panel Session I**  
**Presentations: Tuesday, 10:15-11:45 am**  
**Q/A: Tuesday, 1:15-2:00 pm**

**Panel A: Definitions and Doctrine**

Coordinator

LtGen Paul K. Van Riper, USMC (ret)

Discussant

LTC Anthony Abati, USA, Special Operations Chair, Marine Corps University

Presenter

Dr Howard Coombs, Lecturer, Dept of History, Queen's University at Kingston (Canada)

Paper

“Preparing Officers for the Long War: The Role of Professional Military Education in Producing Paradigm Shifts”

*Abstract*

In contemporary conflict environments, physical, cultural, and cognitive dominance are all necessary to create conditions leading to victory. Professional Military Education (PME) institutions are central to providing leaders the intellectual competencies necessary to deal with the varied dilemmas of the “Long War.” As a case study showing the centrality of PME to changing concepts, convictions, and paradigms, this paper addressed the role of the Canadian Forces College in producing widespread acceptance of the Operational Level of War within the Canadian Forces from 1987-1995.

- This movement was the only significant paradigm shift to take place in Canadian military thought since the Second World War and represented a notable departure from how the Canadian Forces understood and conducted war up to that time.
- The resultant paradigm shift was rapidly accepted and institutionalized, from primarily foreign sources. The Canadian military thus came to identify itself as part of a larger group of military practitioners.
- Far more than military leaders or doctrine writers, Canada's command and staff college was the core mover in promoting and sustaining intellectual change within the profession of arms.
- In large part the resultant paradigm shift was determined by the efforts of the Canadian Forces College rather than military leaders or doctrine writers.
- Without the perseverance of various commandants and directing staff during this period of ferment that Canadian military practitioners would not have been exposed to or adopted as quickly as they did the ideas of operational thought necessary for theatre-level warfare and interoperability with our allies.
- Funding as well, directed particularly at PME institutions, is necessary for these schools to be able to shift conceptions and paradigms regarding force structure, purpose, and uses.

### Presenter

Dr Wray Johnson Professor of Military History, School for Advanced Warfighting, Marine Corps University

### Paper

“Teaching Irregular Warfare: déjà vu All Over Again?”

### *Abstract*

The acclaimed military historian John Keegan writes that “continuities, particularly hidden continuities, form the principal subject of historical enquiry.” Despite the assertions of such luminaries as Bruce Hoffman, Bill Lind, *et al*, there is very little about irregular warfare today that is genuinely new or novel. Moreover, much of what is being written today actually pales in comparison to what has been written about irregular warfare in the past. The problem of “teaching irregular warfare” is therefore one of the rise and fall of interest in the subject in the manner of a sine wave throughout American military history. Thus, this paper seeks to illuminate this phenomenon and advocate for the need to institutionalize irregular warfare instruction as opposed to the historically “faddish” approach of the past.

US military interest in irregular warfare has followed a fairly predictable pattern.

- First, irregular warfare is declared to be a significant threat to US interests.
- Shortly afterward, analysts demand a qualitatively different approach to the threat outside the mainstream of conventional warfare. A contest is engaged between “small wars” enthusiasts and “big war” traditionalists.
- Invariably progress is fleeting as the traditionalists reassert the dominance of conventional principles of warfighting.
- The conventional mindset of the US military is reaffirmed, and the theory and history of irregular warfare recedes into a doctrinal backwater
- This sine wave is best reflected in Service doctrine and professional military education (PME).
- PME programs, which have shown a decided propensity to treat irregular warfare as a fad, quickly dropped when national leadership loses interest or the threat is perceived to have diminished.

### *Excerpts from this Paper*

An analytical distinction between insurgency and terrorism must be made, one that facilitates crafting a strategy and operational art for defeating insurgent and terrorist groups.

If it is useful at all, the term “irregular warfare” reminds us that the subject is out of the ordinary or something you do not counter within normal frames of reference, which, frankly, is the whole problem when it comes to the US military and “teaching irregular warfare.”

As a consequence of their experience in the small wars of the early twentieth century, the Marines published the *Small Wars Manual* in 1935 and revised it in 1940. What made the manual unique at the time was its in-depth exploration of revolutionary guerrilla warfare . . . . The Marines recognized that the “application of purely military measures may not, by itself restore peace and orderly government because the fundamental causes of the condition of unrest may be economic, political, or social.

When the US military deployed to South Vietnam, specific doctrine for counterinsurgency did not exist. Doctrine for counterinsurgency emerged in the early 1960s as an intellectual construct during the Kennedy Administration... Thus, countering insurgency was a crash program thrust upon the military by the President.

In reality... the Services paid only lip service to the theory of counterinsurgency and continued to regard counter-guerrilla operations as merely auxiliary to their conventional and nuclear missions.

[C]ounterinsurgency [was] discredited by defeat in Vietnam and in its stead the US Army conceived a replacement doctrine in 1972 embodied in a revision to FM 100-20: “Internal Defense and Development.”

The paradigm of the 1960s had been counterinsurgency, put to the test in South Vietnam. The paradigm that emerged in the 1980s and was put to the test in El Salvador was LIC. In the early 1990s, the emergent paradigm—MOOTW—would find its first test in Somalia.

The Army and the Marines’ newest manual, FM 3-24/MCWP 3-33.5, repeats the record of the past.... [Y]et again, the US military has issued “revised” doctrine in response to the problem of irregular threats, foreign internal conflict, etc., and it would appear that the cycle described in this study persists.

Following the Vietnam War, the subject of irregular warfare was virtually eliminated from US Army junior officer and non-commissioned officer curricula by 1976. By 1981 the topic had vanished except in specialized instruction for Foreign Area Officers and special forces soldiers. Emphasis in other Army programs fluctuated from year to year, but the importance given to counterinsurgency “never approached the level given to more highly orchestrated warfare of a conventional or nuclear sort.”... Needless to say, given their own outlook regarding small wars, instruction in the US Navy and US Air Force following World War II was even less than the Army and Marines.

The reasons for US military reticence about small wars are many, but the fact remains that, despite the prevalence and particular viciousness of irregular warfare in the developing world, US policy-makers, small wars theorists, and military practitioners have failed to devise an enduring formula to institutionalize conflict short of general war in the US military consciousness.

Conceptual expansion is the first step to correcting this deficiency: that is, adapting a conventional predisposition to unconventional requirements.

Presenter

COL Sean Ryan, USA; Chief, Security Force Generation, Joint Center for International Security Forces Assistance

Paper

“Foreign Security Forces Assistance: Closing the Doctrinal Gaps in the Long War”

*Abstract*

Foreign Internal Defense (FID) refers to organizing, training, equipping, rebuilding, and advising foreign security forces, which is central to interdicting and defeating Irregular Warfare threats. Although Special Operating Forces—SOF—are the recognized FID experts, SOF overall only execute a small portion of organize, train, equip, rebuild, and advise (OTERA) missions. Conventional General Purpose Forces (GPF) are providing more than 4,500 trainers and advisors in Iraq alone and are arguably carrying the ball in this growing mission set. Outside of JP 3-07.1, Joint Tactics, Techniques, and Procedures for Foreign Internal Defense, which is written at an extremely high level, and the Special Forces doctrine, which is extremely narrowly focused at the battalion-level and below, there is little in the way of doctrine for OTERA missions. This paper identifies doctrinal gaps in the US’ military framework and presents recommendations for closing those gaps. Ultimately, this paper highlights key challenges faced by our service members and leaders and offers ways to increase the preparedness of US forces so they may stand a better chance to succeed in OTERA-type operations.

Presenters

Dr Mark Gersovitz; Johns Hopkins University; Norma Kriger, Independent Academician

Paper

“Civil Wars vs. Insurgencies”

*Abstract*

This paper examines different understandings of civil war, and the ways in which the concept of civil war differs from or overlaps with other kinds of violent conflict such as insurgency, irregular warfare, terrorism, state-sponsored violence, and genocide. These distinctions are truly important: recent debate about whether or not Iraq has become embroiled in civil war or something else, and how the US should therefore respond, illustrates the policy significance of labeling violent conflicts. Over the next decades, therefore, civil wars, communal conflict, insurgency, and counterinsurgency will be among primary challenges the US will face in regions where it deploys in support of or in opposition to governments.

- Labeling of conflict should not be arbitrary, but should correspond to an analytic characterization of types of conflict.
- Civil War, as a concept, should focus on a consensus that there was a real and forceful contestation of the monopoly of force that should accrue to legitimate government.

- Locally-determined background factors can alter the character of civil wars, influencing the concept of civil war itself in these local spaces.
- Currently fashionable approaches to classifying civil wars—involving coding rules using a death count number to identify if an event may be classified as a civil war and to identify the start and end of war—are flawed, given their quantitative as opposed to qualitative bias; their inability to capture wars that occur in countries with small populations; and the seeming absence of connections among what are made to appear as distinct violent episodes.
- The apparent consensus in definitions of civil war, whereby violence occurs primarily within individual countries, is also flawed.
- A better paradigm involves the notion of a regional complex of violence involving more than one state.
- The academic literature has paid scant attention to where the Long War is most likely to occur and proposes deeper investigation of the links, as in Iraq and Afghanistan, between the occurrence of the Long War and civil wars.

## **Panel B: Present Perspectives on COIN**

### Coordinator

Col Dan Kelly, USMC, Director of Center for Irregular Warfare

### Discussant

Col Larry Aitken, CAN, Director, Training and Education, Canadian Defense Academy

### Presenter

Dr James P. Storr, LtCol, UK (ret), Independent Defence Analyst

### Paper

“The Lessons of Northern Ireland”

### *Abstract*

The military operations which started in Northern Ireland in 1969 will, without a doubt, be seen as one of the most important campaigns ever fought by the British Army and its fellow Services. That campaign is the British Army’s longest to date; one of the very few waged on British soil; and one of the very few ever brought to a successful conclusion by the armed forces of a developed nation against an irregular force.

At the peak of the campaign in the summer of 1972 28,000 soldiers were deployed. Well over 250,000 members of the Regular Army served there during the campaign, as well as many tens of thousands in the Ulster Defence Regiment and its successor, the Royal Irish Regiment Home Service Force. In the early 1970s rioting in Londonderry or Belfast often went on for days at a time. It was fairly common for over 10,000 soldiers to be deployed on the streets. Thousands of houses were destroyed. Over 10,000 terrorist suspects were

arrested. Over 14,000 illegal weapons were used at one time or another. Yet the campaign has been brought to a successful outcome. The presentation considered how that happened; what the British Army learnt from the process, and what other lessons can be drawn.

This inquiry was relevant for

- a case study of international military experiences and educational approaches.
- Consideration of definitional debates and conceptual developments, particularly in relation to the Long War, terrorism, insurgency, and culture, etc.
- Inquiry into aspects of military culture, and particularly the notion of pragmatism in military operations.
- Discussion of explicit and implicit learning processes, through formal structures and processes involved, and unit experience.

Research material used in preparing this paper includes 416 unit post-operational tour reports. Several thousand other documents were reviewed. 34 volumes of archive materials were provided by the Information Management (Corporate Memory) branch of the British Ministry of Defence. Many documents were highly classified, but are now openly available under 30-year release criteria. Discussions were held with more than 20 retired or serving officers who had commanded at brigade level or above in Northern Ireland. A wide range of other individuals was also consulted, including some who had served in Northern Ireland in 1969 or even before.

#### *Excerpts and Key Observations of this Paper*

- The British Army became very good at learning tactical lessons within the Campaign. This was a significant factor in its success, through the Northern Ireland Training Advisory Team (NITAT). The commander of this organisation, and his staff, visited units and headquarters in Northern Ireland very frequently. He had considerable authority to change the teaching of incoming units and individuals: indeed, he appears to have been *directed* to do so whenever he thought it appropriate. For much of the operation the post was filled by a major. He had invariably just commanded a company in Northern Ireland. For much of the campaign tactical doctrine was the teaching syllabus at NITAT. That was entirely sufficient to achieve commonality of practice amongst deployed units, and to respond rapidly to developments in the threat.
- A further element in the ability to learn lessons was the department of the Scientific Advisor to the GOC, Northern Ireland, known as SCIAD. SCIAD was staffed almost exclusively by government scientists on long attachments to Headquarters, Northern Ireland. They typically remained in post much longer than military staff in the HQ and provided a strong element of continuity.
- The ability to learn tactical lessons quickly was a consequence of organisational structures which empowered people to act swiftly and decisively. It was a campaign- or even war-winner.
- The Army's awareness of the operational level developed only during the later stages of the campaign. There appears to have been little if any formal and explicit process for learning lessons at that level.

- The question of retaining conventional military capability is significant. The Cold War was in progress for the first 20 years of the campaign. Tours of duty in Northern Ireland usually removed a unit from the Order of Battle for the Central Front. This had a negative effect on 'General War' capability, and this could be quantified.
- The requirement to take leave, individual training and then pre-deployment training for the next operational tour sometimes meant that units undertook no unit-level training for general war from one year to the next. It was quite common for them to undertake no formation-level training in a given year.
- Under such circumstances the units involved relied heavily on the collective knowledge of their sergeants. Since the latter did not move between units, a practical level of collective performance could be retained.

Several lessons can be observed in terms of the pedagogy for the Long War.

- The absence of a single campaign authority resulted in the failure to defeat the terrorist form of PIRA definitively in the late 1970s. That indicates a requirement for a mechanism to consider the operational and strategic situation dispassionately, and discuss what would be required to resolve the situation.
- An observation from Operation Banner is the necessity of studying the peculiar logic of local conditions within an insurgency. That will provide useful lessons within the context of that campaign.
- The ability to identify and then learn such lessons very quickly was a critical part of the containment of PIRA in the later stages of the campaign, and hence a major contributor to success. That depended on human structures and processes in which key individuals were given the authority, responsibility and budget to make effective changes at short notice.
- The evidence of learning lessons at the tactical level is strong and positive. The ability of units to retain those lessons over several years was demonstrated, and was in part a consequence of the British Army's regimental system.
- The evidence of learning lessons at the operational level is less strong. The commitment to *identifying* high-level lessons is clear. It appears that the British Army has gained, and does gain, considerably by its experiences. However, the mechanisms for doing that at the operational level are not explicit, and therefore not obvious.

#### Presenter

Dr Martijn Kitzen, Alexander Bon, LtCol D. Bosch, Netherlands Defence Academy

#### Paper

“Educating Counter-Insurgency: The Dutch Experience”

#### *Abstract*

This paper focused on Dutch officer counter-insurgent education in two different epochs: the colonial era in the Dutch East Indies, and contemporary efforts in Netherlands military education to improve COIN skills.

Currently, Dutch forces operate in Afghanistan, with recent experience in Iraq, Cambodia, and Lebanon. During the colonial period, Dutch military officers' academic programs focused to a great extent on cultural awareness, and military members as well as civil administrators received this instruction. At the end of the colonial era, more Cold War-oriented subjects of a technological nature began to dominate learning.. In the past ten years, the return of irregular enemies has driven an augmentation and adaptation of the curriculum at the Netherlands Defense Academy.

Currently, the curriculum includes academic subjects focusing on modern political and military developments, and the intimate connection between political aims and the use of military means. The educational integration of history, foreign cultures, international relations, military operational science and humanitarian law serves one simple objective: to produce a well-founded officer class that can engage complexity to effect. Drawing comparisons among colonial era curricula, colonial operating experiences, Cold War learning, and contemporary military academic programs, this paper assesses the contribution of contemporary Dutch military education to preparing an officer corps to better attend to irregular challenges.

#### *Excerpts from This Paper*

As the colonial forces at the end of the 19th century changed their doctrine of abundant firepower to a more subtle approach of fighting insurgencies, the question arises how this affected the educational curriculum at the military academy. Cadets were traditionally trained for large scale European style conflicts... Success in the multilayered operations against indigenous enemies in the colonies demanded not only knowledge of small war tactics, but even more, stressed the importance of officers schooled to understand native societies. Thus, the transmittance of competences needed for such an approach was a challenge to the Dutch military educators of that era.

Without doubt it can be concluded that the share of topics related to the demands of the Dutch Colonial Army shows significant growth from 1881 to 1931... This educational program was truly a change for the best... Therefore this study program is truly the ultimate evolution of the education for future colonial officers following the adoption of a new method for fighting indigenous insurgencies.

When the UN Secretary General asked the Netherlands in April 1992 to participate in the United Nations Transitional Authority in Cambodia (UNTAC) it was clear that the marines needed a new mission oriented training program... From this period on, training focused more and more on subjects like cultural information, intercultural communication, negotiation techniques, specific topographic information, knowledge about ethnic and national groups and political players.

Step by step marines learnt a coherent campaign plan in which all actors are involved is needed to achieve the success desired by government and the UN.... From Dutch foreign policy perspective, the mission generally was seen as a success... The main subjects of the extra training the marines organized for Cambodia slowly but surely became standard for every Dutch unit sent to operate in a non-Western environment.

Presenter

Dr Jeffrey McIllwain

Associate Professor & Co-Director, San Diego State University Graduate Program in Homeland Defense

Paper

“On Organized Crime and War: Theory, History, and Practice”

*Abstract*

The role of organized crime groups in the Long War has received increased attention in warfighting literature since the events of 9/11. From the poppy fields of Afghanistan to the smuggling rings of Iraq to the piracy off the Horn of Africa to the hawalas and banks of Lebanon, insurgencies, terrorist groups, and nation-states have made use of the unique functions provided by social systems of organized crime on the local, national, and transnational levels to achieve their strategic objectives.

The social system of organized crime refers to the notion that organized crime is a phenomenon recognizable by reciprocal services performed by professional criminals, politicians, and clients. It is thus understood to lie in the relationships binding members of the underworld to upperworld institutions and individuals. Additionally, the social system of organized crime recognizes that organized crime is not a modern, urban, or lower-class phenomenon; rather, it is a historical one whose changes mirror changes in civil society and the political economy.

That is why, naturally, organized crime represents a series of relationships among professional criminals and upperworld patrons and clients. These relationships, and the networks they form, take advantage of the opportunities a host society presents, but deems worthy of criminal, civil or regulatory sanction. Yet the functions they serve (i.e., laundering money, providing weapons, smuggling people, creating forged documents, generating income from illicit enterprises like oil smuggling, fraud and intellectual property theft, providing protection and coercive force, etc.) also make them intrinsically valuable to the insurgent, terrorist, or intelligence agent seeking to undermine an enemy (in addition to providing a deep pool of ideologically or financially motivated recruits). The symbiotic ties between the two often become blurred. Indeed, as recently noted in Army FM 3-24/MCWP 3-33.5, “in some cases, insurgent networks and criminal networks become indistinguishable.”

This paper provided a case study approach geared towards the operationalization and militarization of academic learning pertaining to the criminology of organized crime. It seeks to provide an introduction to the theory and history of organized crime as it relates to military and non-military war operations, then provides case studies drawn from the current conflicts in Iraq and Afghanistan to illustrate how the social system of organized crime is a crucial battlefield necessitating unique strategies and tactics on the part of US and allied forces.

By linking the criminology of organized crime to current military challenges, this paper helps provide a substantive platform from which commanders can achieve objectives outlined in Army FM 3-24/MCWP 3-33.5 to 1) identify which criminal networks are operating in a given area of operations; 2) determine what their activities are; and 3) assess how they interact with insurgents, terrorists, and other enemy operatives.

### **Panel C: Professional Military Education for Irregular Warfare**

#### Coordinator

Dr Jerre Wilson, Vice President of Academic Affairs, Marine Corps University

#### Discussant

Dr Jeff Harrington (Capt, USMC, ret), Thomas & Associates

#### Presenter

Dr Christopher Jasparro, USMC Command & Staff College

#### Paper

“Comprehensive Approach on Teaching Terrorism and Irregular Warfare”

#### Presenter

Dr Eric Shibuya, USMC Command and Staff College

#### Paper

“Teaching Irregular Warfare: Program Development for the Long War”

#### *Composite Abstract*

These papers presented lessons learned by three experienced IW educators as well as charter members of the Department of Defense’s Asia-Pacific Center for Security Studies terrorism and transnational security team from 2000-2006. Experiences in teaching and designing APCSS’ highly regarded Comprehensive Security Responses to Terrorism course (as well as other APCSS transnational and environmental security courses), and involvement with numerous international, interagency outreach and mobile education teams forms the basis for conclusions.

Two main themes provided the presentations’ focus:

- Approaches and techniques for teaching irregular warfare from a comprehensive full-spectrum, all-phase (0-IV), and interagency perspective. Particular attention was given to developing students’ strategic and operational understanding of non-state, irregular threats (evolution, trends, actors, methods, motivations, inter-linkages) and comprehensive countermeasures.
- “Education as operation” was the second theme: How can IW education be employed for international and interagency networking, cooperation and confidence building, influence, and provision of reach-back capacity?

To get at these themes, the papers considered three central topics:

1) Comprehensive Approaches to Teaching Irregular Warfare. Teaching IW is particularly complicated due to the complex, non-state, and diffuse nature of irregular threats plus the often emotive political, cultural, and religious barriers context in which they operate. These issues are compounded when dealing with multinational and interagency student bodies. To overcome these pedagogical difficulties one should consider the following topics:

- Teaching IW in its wider context (but with particular emphasis on counterterrorism)—convergence, similarities, and differences between different IW threats, full spectrum strategies and responses.
- Building international support and understanding of transnational terrorism through teaching of “alternative” threats (e.g. urban gangs, poaching, illicit trafficking, etc.).
- IW capacity building through education.

2) Teaching the Future. Are we always doomed to fight the last war? Teaching about IW and terrorism today while preparing students to deal with the threats of the future remains a challenge. Issues of pedagogical concern:

- The use of evolutionary models and wave theories plus consideration of emerging trends in technology, climate, and geopolitics
- The employment of techniques ranging from multi-media to expert “future’s panels” were covered.

3) Program Development. Effectively and efficiently teaching IW and operationalizing IW education requires more than good and innovative pedagogical technique. It also requires leadership, vision, resources, organization, planning, marketing, curriculum and exercise design, and skilled/knowledgeable faculty. Key elements of IW program development include:

- curriculum design, faculty development and team-building,
- funding, international coordination, exercises and gaming,
- program evaluation, guest instructor recruitment and management, and student selection
- Attention must also be given to building and maintaining alumni-practitioner networks, integration of teaching-research-practice, and challenges specific to outreach.

#### *Excerpts from these Papers*

Applying a wide context to teaching terrorism can produce effects and benefits including: reducing persistent barriers to student learning and interaction, drawing out international and interagency experiences and concerns, facilitating a more comprehensive learning experience, and building mutual respect and confidence between participants. This approach can help counter perceptions and expectations of US centrism and militarism amongst international participants.

A holistic approach to teaching IW that considers multiple threats and their shared contexts and characteristics along with evolutionary and future trends enables students to think about threats at hand today as well as what tomorrow may bring. They can study today's war while preparing for tomorrow's.

The goodwill and understanding that comprehensive approaches to teaching IW and terrorism can generate can produce direct, tangible results in strategic capacity building, educating educators, and networking/information sharing.

If an IW education program is worth having, then it is worth securing and budgeting one's own funding. Relying on grants, seed funds, or other institutions money may leave a program high and dry.

Build and develop a core team to teach and manage an IW education program/course. Guest speakers/instructors cannot provide consistency, reliability or maintain and sustain networks. They are the icing on the cake, not the foundation. Competence is not enough, so hire team players who can work together.

IW is a constantly evolving field and IW threats are learning organizations. Faculty must learn and evolve as well. Subject matter expertise is not immutable nor does it confer general expertise. Professional development should be constant. Teaching, research, and practical experience should not be distinct and competing spheres but rather complimentary. Overlapping, and synchronized activities.

#### **Panel D: Knowledge Management**

##### Coordinator

Col Mark Silvia, USMC, Operations Officer, Marine Corps Center for Lessons Learned

##### Discussant

LtCol Hawkins, USMC, Marine Corps Center for Lessons Learned

##### Presenter

Dr Richard Werking, Library Director & Professor of History,  
United States Naval Academy

##### Paper

“Libraries and the Teaching of Irregular Warfare: Some Present and Future Possibilities”

##### *Abstract*

This paper discusses some of the most pertinent online library materials used by military colleges at both graduate and undergraduate levels, and it reports on the results of a survey of librarians in the dozen institutions that form the Library Working Group of the

Military Education Coordination Council. It suggests possibilities of collaboration among libraries in several areas: making materials available, teaching research skills, and helping construct a system facilitating the exchange of syllabi among faculty.

To teach and learn about irregular warfare, we need (1) requisite library materials for the study of existing knowledge and creation of new knowledge, and (2) research skills necessary to identify, obtain, evaluate, and use recorded knowledge and other information. These will provide the best and most reliable information possible, strengthened by its need to withstand scrutiny from dissenting voices.

Those who would teach our men and women in the military must ensure the availability of a broad range of pertinent library materials for themselves and their students. In the context of irregular warfare, these are materials that provide a wealth of information about the history, culture, and current affairs of other regions and peoples, and which also draw from a broad array of the other disciplinary literatures in the humanities and social sciences that are essential for gaining an understanding of irregular warfare and its complexities. Religion, anthropology, history, and political science would likely be among the most important such disciplines.

#### *Excerpts from This Paper*

Those of you who are planning and implementing pedagogy for the subject of irregular warfare are facing some of the same fundamental questions that confront other thoughtful teachers, on a wide variety of subjects. Among these questions are: 1) What do we want our students to *know*?; 2) At *what points* in their education?; and 3) What do we want them to be able to *do*?

An important component of this requirement is that our military men and women should be exposed to views about US government policy that run counter to whatever the current received wisdom happens to be. (I'm reminded that both Carl Becker and William Appleman Williams used to emphasize that one of a historian's obligations was to "think otherwise.") And as a colleague of mine put it after he had read my proposal for this paper: "At a conference like this, . . . I would emphasize that we cannot merely focus on learning about more trees. We need to reconceptualize our view of the forest."

The two Centers sponsoring this conference could take the lead and serve as examples for what should be happening among our military educational institutions in these areas, at both undergraduate and graduate levels.

Over time, if it is determined to be both desirable and feasible, a web-based mechanism for delivering some content and assistance with developing research skills could also be used to share syllabi, course materials, and other best practices. It is highly likely that such initiatives would require some new funding (principally for staff assistance, although perhaps for additional materials too), albeit a relatively modest amount.

Our nation has never won a war in which it was engaged for more than four years, with a single exception: the American Revolution. And there *we* were the insurgents. Consequently, we need to bring to this struggle as much intelligence, information, knowledge, and wisdom as we can muster, together with institutions and well-managed operations to match. It is fitting to conclude with a reminder from General Alexander Vandegrift shortly after World War II: “Despite its outstanding record as a combat force in the past war,” Vandegrift emphasized, “the Marine Corps’ far greater contribution to victory was doctrinal....”

#### Presenter

LTC Gil Ariely, PhD, Chief Knowledge Officer, Israeli Defense Forces

#### Paper

“Operational Knowledge Management”

#### *Abstract*

This presentation introduced Operational Knowledge Management (OpKM) concepts in IDF (Israeli Defense Forces). It covered OpKM evolution in IDF Ground Forces (GF), and an introduction to OpKM vehicles and methods. The 2<sup>nd</sup> Lebanon war (2006) was the case-study. The case study covers the OpKM vehicles implemented, based on an array of Operational Knowledge Officers (CKO) in the units, and the Army KM doctrine. The Army KM doctrine book (developed through years of LIC and published after the war) aims to assist in closing potential knowledge gaps amongst fighting-forces and training centers.

An imperative lesson learned from years of LIC (Low Intensity Conflict) and implemented throughout the war was how to learn lessons and disseminate insights in real-time to the fighting forces. This is known as Operational Knowledge Management. It is not only inherent in the pedagogy of the 'long war' we are facing, but is in effect part of the vehicles we teach in asymmetric warfare, confronting a learning opponent.

Years of LIC have proven that learning mechanisms are crucial for coping with an asymmetrical rival, which is an intuitive learning organization. Learning throughout the fighting is crucial when confronting a dynamic enemy such as the Hizbullah, and learning cycles throughout the war proved to be from hours to days—demanding a similar IDF ability. The learning feature is asymmetric too, since in a hierarchical large organization such as an army, a structured learning mechanism is required to transfer knowledge (especially in short cycles). This differs from a networked cell structure in a smaller and dynamic organization. Indeed, the need to learn while fighting in Lebanon was initially derived from Hizbullah's intuitive ability to learn in short cycles.

A hierarchy needs to study to learn, whilst a terrorist organization is an intuitive learning organization. Likewise, in terrorist organizations, knowledge is acknowledged as a prime resource (i.e. the evolution from smuggling weapons, to smuggling explicit knowledge of producing it in tutorials, electronic media forms etc. and to the smuggling of tacit knowledge inherent in experts).

The need to learn from the battlefield, to creatively innovate operational knowledge, to shorten learning cycles and speed up the dissemination of lessons learned characterize contemporary warfare. It will only become more so in the future. We must learn, preserve and enhance the real-time learning mechanisms and the methodology of operational knowledge management developed in recent years, versus an opponent that does the same.

As such, we must revise the pedagogy of the long war—towards short and instantaneous learning cycles, and proposed that requisite qualities for learning are learnable. The result is an adaptive ability that may act as a catalyst for change, by enabling pattern-recognition throughout the long war (and in the battlefield), and by allowing warfighters to challenge operational paradigms.

This ability should be pedagogically installed as a gene to be “entwined” into organizational DNA through education of commanders in order to help transform the military to develop real-time adaptive-abilities. This “adaptive gene” is vital in the military organizational evolution to adapt to the constantly changing environment in the long war.

#### Presenters

Professor Keith Brown, Watson Institute for International Studies, Brown University  
Deborah Scranton, Independent Researcher

#### Paper

“An Enhanced Reading List for the Long War”

#### *Abstract*

The Commandant’s reading list is designed to provide Marines with “an intellectual framework to study warfare and enhance their thinking and decision making skills” and to serve as “a combat multiplier by providing all Marines with a common frame of reference and historical perspective on warfare, human factors in combat and decisionmaking.”

This paper explored two possible enhancements to this key resource in Professional Military Education:

- Newly available texts that could provide Marines with an understanding of the particular demands of irregular warfare.
- A proposal that with the widespread availability of DVD players, visual resources—including documentaries, feature films, and television series—be considered for inclusion in such a list.

The paper drew on classroom and practical experience to discuss techniques for enhancing individual reading or viewing experience through different forms of structured discussion, feedback or interaction, as well as through creative work.

The paper was divided into three sections.

- A survey of the wide range of books and films already available which depict the first-hand experience of conventional and unconventional warfare, including civil-military, security, transition and reconstruction operations in Afghanistan and Iraq. As of summer 2006, at least 30 books have been published, including personal memoirs (sometimes based on blogs), accounts by embedded journalists, and official histories of operations; key titles include *One Bullet Away*, *Twice Armed*, *No True Glory*, *We Were One* and *The Blog of War*. Documentary films include *Occupation: Dreamland*, *The War Tapes*, and *Iraq in Fragments*. A number of feature films dealing with aspects of the current conflict are in production, including *Battle for Fallujah* (2008) starring Harrison Ford, and *Rendition* (2007) starring Jake Gyllenhaal. Discussing the different points of view expressed in these works, the authors focused in particular on the ways in which the works, or key passages in them, illustrate critical issues in the conduct of irregular warfare (including, for example, interactions with civilians; cultural and linguistic factors in communication; switching between kinetic and non-kinetic operations; identifying hostile intent; managing rules of engagement; addressing stereotypes).
- A focus on the different impacts of textual and visual sources in pedagogy for the long war, drawing both on the authors' experiences (in journalism, film-making and university education) and on prior accounts of the use of different source. Many of the memoirs make reference to a shared set of cinematic reference points—including especially *Black Hawk Down*, and a range of Vietnam-based combat films—while accounts of briefings in Washington describe the importance attached to the feature film *Battle of Algiers*. This section distinguished the kinds of information or perspective that film and literature, by virtue of their different structures, make available to readers and viewers, and suggest that for some pedagogic goals, one medium will work better than the other.
- Concrete examples of pedagogical techniques to enhance the value of individual reading or viewing. The presenters discussed structuring mechanisms employed successfully to promote discussion, feedback or interaction around particular texts or films, as well as in the creation of new learning resources for use by others.

## Presenter

Dr David Betz, Lecturer in War Studies: Dept of War Studies, King's College, London

## Paper

“The Real Revolution in Military Affairs: Online Continuous Learning”

### *Abstract*

The arresting metaphor of “changing tires on the fly” used by Frank Hoffman to describe the challenge faced by the United States Marine Corps in transitioning from high-intensity conflict to intense civil-military operations in Iraq 2003/4 is an equally apt description of the challenges faced now by the whole US and allied defence establishment in transitioning to the mission profile now called ‘The Long War’. This is because the landscape of 21st century conflict is shaping up to be an order of magnitude more complex than the past, making constant change the new norm and, therefore, constant adaptation the new mission.

Success in the ‘Long War’ calls for mainstreaming in the regular armed forces skills and mindsets which have traditionally been seen as tertiary to the warfighter. These include, inter alia Civil-military and stability operations; Information operations; Unconventional warfare and COIN; Joint, Inter-Agency, and Coalition operations; Cultural and language skills and regional expertise.

Pedagogically, these skills share characteristics: They are not strictly ‘military’ (or indeed principally military in most instances), and are perhaps best learned outside of a uniformly military institution; and they are complex skills depending on the synthesis of deep knowledge across fields, through an integrated programme of study including aspects of political and military history, strategy, international relations, and area studies with clear internal skill progression and structure.

Given current operational tempos, however, potential military students are usually preparing to be deployed, on deployment, or recovering from deployment. Few have the time and opportunity to take part in what effectively would be graduate academic study.

If change is the new norm then continuous learning throughout one’s career is essential; Irregular Warfare pedagogical success will then need challenging, advanced, immersive, richly-resourced, peer-interactive degree programmes delivered entirely on-line in a manner which is flexible enough to accommodate the existing high operational tempo without compromising academic standards.

This paper proposes such an approach based on the experience of the Department of War Studies, King’s College London’s entirely on-line MA War in the Modern World which has been running since September 2005. Over half the (total 100+) students on this course are serving British Army officers, most of whom have deployed at least once during their time of study. Other students include serving USAF and USN personnel, Singaporean and other military officers, as well as civilians from the NGO, private military, diplomatic, legal and other fields.

**Panel Session II**  
**Presentations: Tuesday, 2:15-345**  
**Q/A: Tuesday, 4:15-5:00 pm**

**Panel E: Military as Culture**

Coordinator

Dr Charles Heller, United States Army Command & General Staff College

Discussant

Dr Matthew Broaddus, United States Army Command & General Staff College

Presenter

Dr Charles Kirke, Center for Human Systems, UK Defence Academy

Paper

“Change and Military Culture”

*Abstract*

Prosecuting the Long War and the increasing emphasis on irregular warfare have already involved changes in Western military structures and modes of operation, and are bound to involve more. This paper addresses the interaction between change and unit organizational culture from a military anthropological perspective, with special reference to the British Army.

A series of models, or conceptual frameworks, are used to address the nature of culture in general, and the interaction of change and organizational culture. Three processes are examined: the author’s concepts of ‘cultural drag’ and ‘cultural precession’ and Anthony Giddens’ model of ‘structuration’:

- Cultural drag refers to the continual harking back to the state of affairs pre-change and the resultant slower than expected adoption of change
- Cultural precession captures the phenomenon whereby unanticipated consequences arise from culturally-based reactions to change by members of the organization
- Structuration is used to describe the continual renewal and updating of social structure through the processes of every-day life.

The focus then moves to the British Army via the author’s model of British Army organizational culture, based on case studies involving change at unit level, showing the working-out of cultural factors as a major influence in the processes of change. These case studies show cultural drag and cultural precession in action, and, conversely, how going with the cultural flow achieves rapid adjustment through organizationally benign structuration.

It is therefore important to understand the culture of any organization where change is intended, or where change is about to be imposed through an alteration of outside circumstances. In this respect, knowledge of the culture of the target audience appears to be a crucial enabling factor in pedagogy for the Long War. Indeed, it follows that understanding the organizational culture of the military forces being taught and trained to take part in the Long War should be more than an obligation for those planning and executing teaching and training: it should be a solemn duty.

*Excerpts from this Paper*

Those involved in developing new systems and ways of dealing with terror should learn to go with the culture of the individuals and groups who will have to face the enemy and put them into practice.

Go with the organizational culture to achieve rapid adjustment. Teach within the cultural nexus to communicate effectively with your students.

Go against organizational culture and get unexpected (and almost certainly unwanted) results. But how can anyone go with any organizational culture if they do not know it well?

It follows that we ought to devote considerable effort to understanding the cultures of those who need to learn. Indeed it should be more than an obligation for those planning and executing teaching and training: it should be a solemn duty.

Presenter

Timothy Sikes, USMC Center for Advanced Operational Culture Learning

Paper

“I’m Not a Policeman, I’m a Princess: Changing the Way the United States Military Talks and Thinks about the Long War”

*Abstract*

Imagine the scene in the movie *Kindergarten Cop* when a little girl sits on the floor adamantly declaring “I’m not a policeman, I’m a princess!” She persists until she is confronted by the imposing reality of Detective John Kimball, played by the 6 foot 2 inch tall former-bodybuilder Arnold Schwarzenegger. That little girl bears a troubling resemblance to the United States military, which has resolutely declared for decades, “We’re not peacekeepers, state-builders, or international policemen; we’re *warfighters!*” The US military has maintained a very narrow view of warfighting. It uses terms like “conventional” warfare, “traditional” warfare, and “kinetic” operations to describe what the military *does*. Meanwhile, terms like “unconventional” or “irregular” warfare, peacekeeping, and reconstruction define things that the military *does not* do, or at least *prefers* not to do. The way in which the US military talks and thinks about warfare, particularly during formal and informal military education, has constructed serious misconceptions about the nature of warfare.

This distinction has had far reaching consequences, ultimately leaving the military poorly prepared to successfully fight most wars. If the US military is to fight and win the nation's wars, it must adopt a more complete vision of warfare that will allow it to incorporate all aspects of national power into a coherent execution of grand strategy.

*Excerpts from this Paper*

The simple fact is that a war is not won until a stable peace has been created. Creating such a peace requires more than just tactical success and effective implementation of doctrine. It requires military strategy to be employed in conjunction with the other elements of an effective grand strategy, including political, diplomatic, economic, and even cultural measures. If the duty of the US military is to fight and win our nation's wars, the military must be prepared to integrate all elements of national power into its operations in order to truly win wars.

The tactical and operational implementation of national power includes activities like stability operations, Civil-Military Operations, Information Operations, advising foreign forces, and culture and language skills. The current approach of the military to warfighting relegates these other elements of national power to second-class status by using terminology that forces them outside norms of military activities. The soldiers, Marines, sailors, and airmen of the US military are not encouraged to think of these activities as part of their duties; they are not trained effectively to perform them; and the very structure of the military is not designed to employ them.

The intent is not to do away with the warfighter ethos, but to expand it to make our warfighters more capable.

The warfighter ethos must be expanded to allow for the employment of all aspects of national power as a part of combined arms. Warfare is far more complex than simply killing people and breaking things. The US military must be prepared to fight and win all wars, not just the ones it prefers to fight.

Presenter

Dr Allan English, Associate Professor, Department of History  
Queen's University at Kingston

Paper

“Influence of Our Military Culture on What is Taught in Our Professional Military Institutions”

*Abstract*

In the post-9/11 security environment scholars and military professionals focus attention on the cultures of adversaries, and to a lesser extent of allies, as part of an attempt to understand what methods could be most effective in achieving national security and defence objectives. The product of this research effort comes from many sources, but an important part of the research that generates this product is conducted within and

disseminated through professional military education (PME) systems. The research findings and what is selected from them to be taught in PME institutions are, however, often influenced by a relatively neglected phenomenon - our own military culture.

Military culture has been described as the “bedrock of military effectiveness” because it influences everything an armed service does. The recent conflicts in Afghanistan and Iraq have highlighted the importance of culture as a concept in analyzing the ability of military organizations to perform certain tasks. In fact, a military service’s culture may determine its preferred way of fighting and dealing with other challenges, like incorporating new technologies, more than its doctrine or organizational structure.

An armed force’s own culture is a key determinant of how it perceives its future roles and missions and how it will prepare for them. PME systems are a critical component in this preparation process because the faculty of PME institutions in these systems often play a key role in determining possible solutions to future challenges and they also educate and train members of armed forces in the range of solutions to problems that has been deemed to be acceptable by each institution.

Over the past 25 years, several new concepts have been debated and taught in Western PME institutions. An analysis of the various curricula of these PME institutions during this time shows that each institution approached these concepts differently in terms of the emphasis given to each one and how competing concepts were presented. The curriculum choices made by each institution were the result of the interaction of many factors; however, service and organizational culture can be seen as key influences among the various factors.

This paper focused on the influence of national, military, and organizational cultures on determining what is taught and how it is taught in PME institutions. Concepts such as espoused values, values-in-use, cultural “fit,” adaptive cultures, as well as the integration, differentiation, and fragmentation views of culture were used to examine how an armed service’s culture influences what is considered in its PME institutions as the acceptable and desirable range of solutions to current and future problems.

This paper argued that without a clear understanding of our own cultural perspectives and how they influence choices in research and in what is taught in PME institutions, efforts to transform PME to meet challenges, such as the “Long War,” may fail.

## **Panel F: Language**

### Coordinator

COL John Bird, US Army Intelligence Center, Training and Doctrine Command

### Discussant

MAJ Remi Hajjar

Cultural Center, Training and Doctrine Command

### Presenter

Dr Andrea van Dijk, Netherlands Defence Academy, Tilburg University

### Paper

“Tongue-Tied: Language Lessons for the Long War”

### *Abstract*

Defense Departments of various countries expect language to be the missing concept that could finalise the transition of conventional warfare to unconventional warfare. Talking bullets no longer suffices. More refined weapons—read *linguistic tools*—are required to help counter insurgencies.

Although language proficiency can be described as the lubricant of communicational processes that take place inside and outside international military organisations, a command of the English language, however, is not yet self-evident for all of the actors participating in the information structure of military missions. How does language (in)competence for instance affect the managerial positions of (non-commissioned) officers, and what are the detrimental consequences of the language barrier within the operational field? Are interpreter interventions in this regard effective solutions or should military academies invest more in language training of their military personnel?

Although these questions are still in need of answers, this paper investigated language matters within the military by discussing not only the role and position of language nodes within the military organisation, but also the demographics, competencies and skills of interpreters.

The latter category forms an essential but ambivalent tool in the military objective of winning ‘the hearts and minds’ of the local population. Because of the lack of linguistic proficiency of deployed contingents, military organisations depend for their field negotiations on the assistance of local interpreters. Yet, local interpreters remain *locals* with obscure and unfathomable motives and interests. This friction obviously puts the objective of winning the hearts and minds in a somewhat disturbed light. How to win the hearts of the local population, if you dare not trust the mind of the persons who hold the key of unlocking it?

This paper sought to analyse the force field of language management within the military by exploring the interdependency of language proficiency and interpreter interventions.

Through a discussion of field studies conducted during an international military training in Lehnin (Germany), and military peace support operations in Bosnia, Congo, and Kabul, this paper worked to uncover the obstacles of the language barrier by dissecting the role and position of language within the broader context of military organisations.

Ultimately, this presentation sought to substantiate the supposition that language training among (non-commissioned) officers might actually, when implemented appropriately, make the long war a bit shorter. Linguistic knowledge, after all, could help the military officer to utilize the potential resources of the military organisation. It is precisely in this capacity that language management could be a pragmatic tool in pedagogy for the long war.

#### Presenter

Dr Clarissa Burt, Assistant Professor of Arabic  
United States Naval Academy

#### Paper

“Terms of Engagement: The Peculiar Dance of Teaching (Arabic) Language and Culture in Military Environments”

#### *Abstract*

This paper examined the space of epistemological ambiguity opened by the teaching of (Arabic) language and culture in military environments, and the implications of opening that space for teachers, students, and the military apparatus which may then employ those students with their language capabilities. The paper explored

- the levels of competence which may be achieved in studying (Arabic) language and culture at a military academy
- the limitations and opportunities of that achievement
- the implications of those limitations and opportunities

Using the metaphor of a “dance,” classroom anecdotes, correspondence from former students, Arabists, and other teachers of Arabic language and culture, and contemporary media, this paper aimed to

- expose at the constraints, opportunities, and pressures on students of (Arabic) language and culture
- report on issues in teaching Arabic language and culture in the military environment
- explore these issues’ and their implications for teachers, students, and the military goals as articulated and detailed in the DOD Road Map for Language and Culture.

Language and culture learning necessarily opens a dialogue with “anOther.” It thereby creates a relational space between the student’s native culture and the culture of study, in which the student must negotiate between the truths which inform and construct the realities of her home culture, and the truths which inform and construct the realities of the culture under study. It is a relational space of ambiguity which sets off contrasts between interlocutors, and yet affirms their common humanity.

By creating and entering a space of engagement, and by striving for a common language that acknowledges the validity of the other, through confirming the other’s language and cultural framework as a legitimate parameters within which interaction may occur, interlocutors are affected, altered, and often made uncomfortable by their position of between-ness. Different students and faculty will react to this place of between-ness in different ways.

Language and culture learners can be thought of as dancers. A student learns first to dance in all the media, styles and forms of her source culture, the first and primary partner. When one takes on the learning of the second language and culture, s/he must step out of the familiar range of movements, learn to move anew, think and move differently, learn different rules, forms and ranges of movement and styles of expression. The student dances with a new partner, the target culture.

Needless to say, there are those who are simply too rigid to learn new steps; there are those who can dance, but whose bodies retain the underlying character of their own culture’s dance; there are those who will step on their partner’s toes time and again, but over time will begin to grow in competence and confidence in the new style of dance. Then there are those who are natural dancers, and who may lose themselves in the dance and whose progress and ability shine through from the first moment on the floor.

The relational aspect of this paper’s metaphor was critical, for the dancer interacts with each partner—his own source culture and language, and the language and culture under study.

The military environment and the military culture complicate matters even further for all partners concerned, because military culture too constitutes a dance partner with its own regimented rules of movement and interaction, express limitations on the amount of access the dancer has with the primary partner and the new partner, and its dictates for the moves of the march that ultimately the dancer/student must perform.

## Presenter

Dr Barak Salmoni

Deputy Director, USMC Center for Advanced Operational Culture Learning

## Paper

“A Concept for Operational Language”

### *Abstract*

Military organizations have been involved in training their personnel for language use for quite some time. Traditionally, however, that training has focused on professional users of the language; that is personnel whose military occupational specialty or professional billet require them to use the language at a relatively high degree of capability, particularly for skills such as transmission listening, text reading, or documentary translation and exploitation.

However, deployments since the end of the Cold War, and particularly since 2001 and the beginning of Operation Enduring Freedom, have shown that general purpose forces need personnel who can communicate in multiple languages. In these contexts, the ability to speak, listen, and use a combination of words and facial expressions and hand movements to convey meaning, and access what indigenous people themselves are communicating, has become of much greater importance than traditional language skills, as understood and taught in the US military.

In short, there is a need for “operational language” skills in the general-purpose forces of many military occupational specialties, de-anchored both from traditional notions of fluency, as well as from conventional teaching methods and proficiency targets.

So far, however, there has not been a precise or user-oriented definition of “operational language,” and what that entails for necessary subject matters, realistic expectations, and methods to evaluate and rate learners of language in an operationally-focused fashion.

This paper sought to propose what “operational language” is; the gamut of speaking, listening, and non-verbal communication skills it should encompass; and the realistic expectations for training time, topical coverage, and resultant functional capabilities. The paper will conclude with a proposal for an “operational language” rating system which is more commander- and the operator-attuned than current rating systems in use, such as the Interagency Language Roundtable (ILR) and American Council of Teachers of Foreign Language (ACTFL) rating systems.

Analysis and proposals in this paper were based on the author’s experiences in studying several languages currently in use in operating environments; training and educating US forces at every stage of pre-deployment as well as in a PME framework; developing, evaluating, and implementing language learning curricula for military and civilian audiences; observation of language instruction currently in use in the US military; and interviews of US and foreign military personnel.

## **Panel G: Information Operations**

### Coordinator

BGen Thomas V. Draude, USMC (Ret), President & CEO, MCUF

### Discussant

Dr Dan Moran, Dept of National Security Affairs, Naval Postgraduate School

### Presenter

Dr Andrew Garner, Analyst, UK Defence Science & Technology Laboratory

### Paper

“Influence in the Development of UK Concepts and Doctrine”

### *Abstract*

This paper reported on work undertaken by the Defense Science and Technology Laboratory (DSTL) to support the development of UK military understandings of ‘influence’. It critically assessed the challenge of this work in relation to three key groups:

- The military themselves
- The complex groupings of local and adversary communities where the military operate
- The academic community whose theories should inform this work but who are often reluctant to become engaged.

This paper also examined how cultural understanding, a pre-requisite to being able to influence, is under significant tension both theoretically and practically between these communities of interest.

The conclusion reviewed both the difficulties and potential gains in developing the concept of influence in the military.

The current operational experience of irregular warfare, insurgency and terrorism in theatres has led to a reassessment of force capability, primarily in terms of enhancing analytical capability to determine how to maximize influence. Indeed, the traditional tools of the military are being stretched in new ways as operations take on increasingly complex mixes of warfare, counter insurgency, peace enforcing, peace keeping, training partners, and ensuring security for development agencies. Success in these tasks also requires an understanding of global communities and ever more instantaneous media attention. In the UK, the effects-based approach, which laid a requirement for cross agency working to achieve agreed ends, has in turn led to the recognition of a need for better conceptualization of both the task and the means to achieve that task.

One platform to address this need is expressed in the current focus of research on the new battleground, one which takes influence as the integral other to ‘fires’ (kinetic weapons), in ways well beyond the traditional military understanding of information operations.

Analysis undertaken at DSTL to support the development of the concept of influence has begun to map the problem space. Influence ‘enablers’ have been identified and their strategic contribution to an overall campaign outlined. A number of gaps have been identified including the need for embedding pre-deployment training in cultural awareness and increasing the number of specialists with skills in this area. Training needs are beginning to be addressed in a variety of ways including the embedding of a cultural analysis toolkit in military exercises.

A more fundamental challenge lies in interpreting post-structural approaches to the culture / agent complex to a largely positivist military community. While the need is recognized, there is some way to go to achieve acceptance. Part of this challenge lies in making more transparent both military and adversary ideologies. Considerable energies are expended identifying and engaging with the ideologies of local and adversary communities in operational theatres. To date, less effort has been directed towards understanding our own ideologies in relationship to these. In fact, influence itself is a weighted term expressive of UK ideologies. It builds on our experience of developing tools to influence predominantly symmetrical adversaries. There is a considerable way to go in both sufficiently clarifying concepts and developing appropriate training.

#### Presenter

LTC Norman Emery, USA, Chief, Information Operations Field Support Team  
1<sup>st</sup> Information Operations Command

#### Paper

“Information Operations in Irregular Warfare: Understanding the Role of People and Populations”

#### *Abstract*

Prolonged US engagements in Iraq and Afghanistan have had a major impact on how military operations are conducted, as well as the role general forces play. The purpose of this paper was to share ideas and concepts with peers, the IO proponent, and others responsible for the training, educating, and preparing of IO officers for OIF and OEF. Despite the author’s 10 years of Army and Joint IO experience at tactical, operational, and theater levels, he continues to experience with each successive deployment hard and sharp learning curves. An examination of warfare and information operations doctrine is required not just of senior leaders, but also those responsible for executing and coordinating operations in Irregular Warfare, and the military education and training system responsible for preparing those individuals and forces. In IW, the role of IO is significantly greater than during major combat operations. The people of the populations, and the roles they play in society, government, the military, and insurgency, are a foremost focus of IO methods in support of Irregular Warfare.

In current conflicts, all actors, state and non-state, are competing for the same objective: the people. There is a need to understand how this requires a change in the application of Information Operations (IO) that is markedly different from that used in traditional, or conventional, warfare. In IW, various non-lethal capabilities have a more prominent and necessary role than in conventional warfare. IO has significant use in directly impacting the operational focus of IW—the people that comprise the relevant populations.

*Excerpts from this Paper*

The current Joint and Army IO doctrines do not adequately address the challenges confronted by long-term stability operations in the face of irregular adversaries and asymmetric conflict. The doctrine remains entrenched in emphasis on the adversary decision-maker while minimizing the importance of the projection of public information and engagements within the area of operations to key non-adversarial audiences, especially foreign populations. These are critical tasks requiring greater expertise and an understanding of the IW Information Environment (IE).

To succeed in IW, IO officers need to understand how IW compares to conventional and counter-insurgency (COIN) warfare, the importance the population plays, how various adversaries project their information, and the need for proficiency in cultural studies and of human behavior. IO planning must consider not only actions to support the tactical operation, but also the hierarchy of effects in the Information Environment that impacts a unit's area of operations and area of influence.

To accomplish this, an examination of the role and education of IO officers, and the proposed operations and current IO doctrine is needed, so we do not continue to prepare soldiers to fight today's war with yesterday's IO tactics, techniques and procedures. An examination of IW IO must not simply impart vignettes, lessons learned and professional opinions; it must consider what makes IO a challenge in the current combat zones and how those factors necessitate adjustments and conceptual adaptations of IO. Indisputably, the current complex war environment requires this change.

IO is more than just PA and PSYOP releases following a mission. Although the population's role in IW requires the emphasis of the public engagement aspect of IO, an enemy we once underestimated is demonstrating a more effective use of cyberspace as an internal and external communication tool, which requires special "technical" IO attention and efforts.

At the tactical and the theater levels in Afghanistan and Iraq, it is time for PA and PSYOP officers to define how they will cooperate and coordinate in support of the commander's information objectives, rather than continue to itemize reasons to stay at arms length. Continued friction only serves the adversary. Our various adversaries cannot be prevented from disseminating their messages, but we can impact how that message resonates with intended target audiences.

A misguided expectation is that words alone will have a tipping point effect. IO is not a golden arrow or a silver bullet to immediately counter and destroy enemy propaganda, or cause whole populations to quickly change disposition; it requires coordinated military operations. IO officers should be capable of advising their commanders of the risks and potential direct, indirect, and collateral effects that physical domain operations will have on the Information Environment. In evaluating effects, let's not make the process to measure them too hard.

COIN success begets conditions that ultimately result in new problem sets which reflect the inseparable political, military and social elements of IW and often require the indirect and non-lethal effects offered by coordinated IO. A rule to heed; don't underestimate these challenges just because you understood the information and threat environment during your last deployment.

IO planning must consider not only actions to support the tactical operation, but also the hierarchy of effects in the IE that impacts a unit's operational area. A commander engaging physical, informational, and cognitive dimensions at the tactical level can gain exposure at national, regional, and international levels, and the impact in the cognitive dimension can have positive or negative effects directly or indirectly on future operations for all commanders in theater.... Despite its technology, the military will rarely, if ever, gain information supremacy, and information superiority is fleeting. We cannot prevent an adversary from putting out a message or information. What we can do, and should be our strategy, is to set conditions in the IE with the key audiences (unopposed, opposed, undecided), so when opposing messages come out, it does not effectively *resonate*.

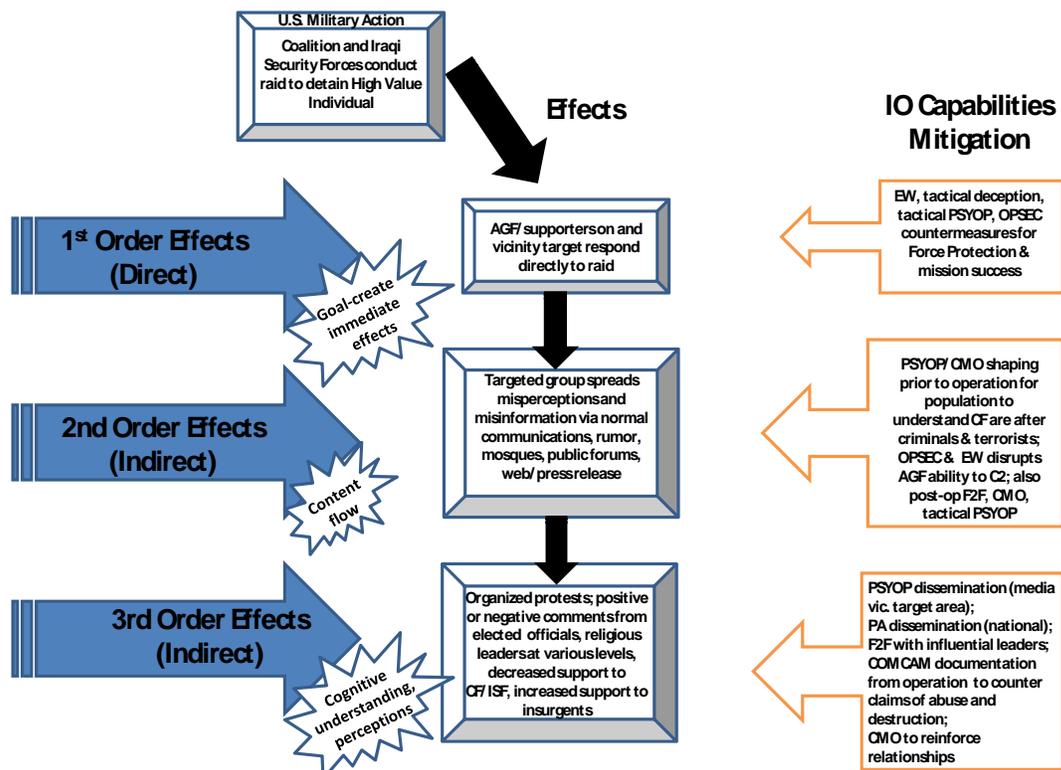
A global information environment where most people believe the first story out creates the temptation to respond with a strategy of short engagement actions instead of adhering to the enduring conditioning actions. IW IO efforts should not be viewed as short-term, especially when insurgencies historically have lasted 9-12 years.

In competing for the population, terrorist and insurgency groups must also abide by the rule of understanding their audience. The descent into barbarity by such groups as al-Qaeda in Iraq achieve not a persuasive effect against the fence sitters, but instead a possible loss of support from its own constituency. Competing adversaries within a state can also lose audiences as populations as a whole are being presented with various and conflicting messages. This is to our advantage and it is critical to develop and reinforce consistent themes and messages over time in coordination with Iraqi and Afghani governments.

It is critical that the current doctrinal construct of IO core, related and supporting capabilities be set aside, because it creates false barriers to planning, coordinating, and executing IO in IW. The IO core capabilities listed in current doctrine—Psychological Operations (PSYOP), Electronic Warfare (EW), Computer Network Operations (CNO), Operations Security (OPSEC), and deception—have a logical but not natural grouping, and constrain leaders' view of IO by portraying it simply as these five core capabilities.

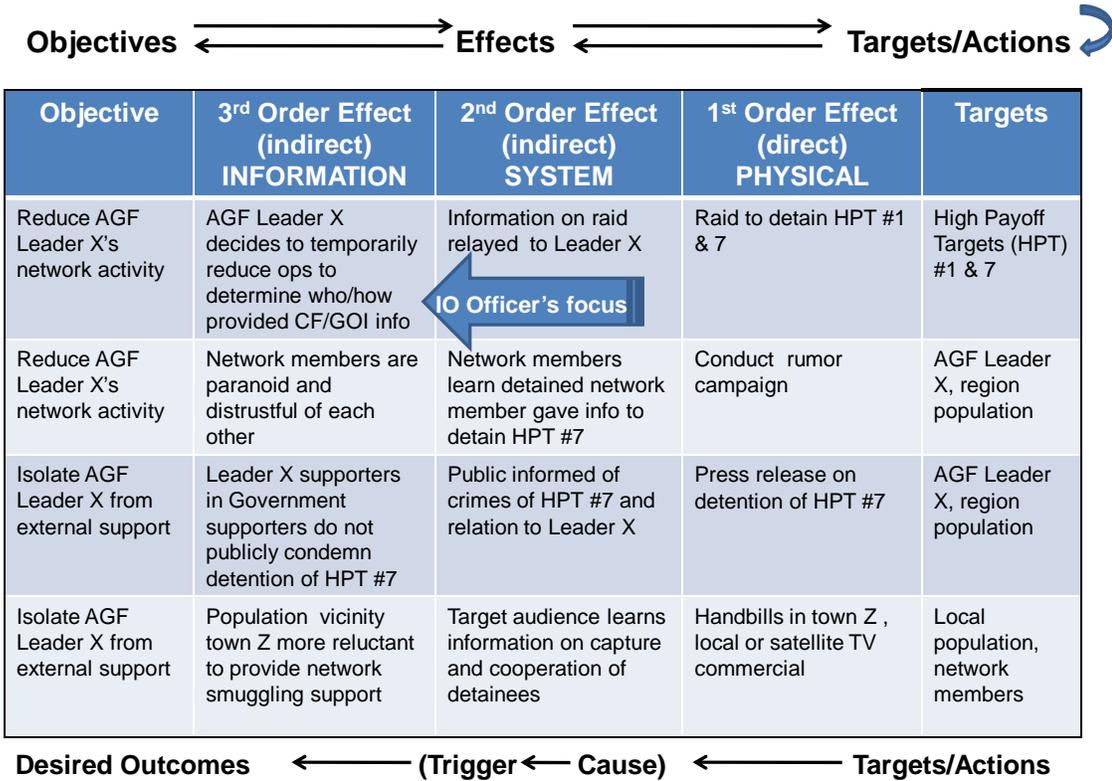
IO is not simply a grouping of capabilities that comprise information, but should be viewed as a grouping of capabilities that *affect* information. More importantly, IO collectively has a *specific purpose and emphasis* within an overall plan of action, and operates under the same dynamics and is inseparably linked with kinetic combat operations. IO is more than just PA and PSYOP releases following a mission.

It is paramount that IO officers understand 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> order effects and apply this information to tactical planning in IW. IO officers can expertly advise the commander on assessing IE risk to daily combat operations by addressing 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> order effects in order to identify collateral effects, which are resulting positive or negative outcomes other than what was intended. A 1<sup>st</sup> order effect is a direct effect, a result of actions with no intervening effect or mechanism between act and outcome, and can trigger additional outcomes, which are indirect (2<sup>nd</sup> and 3<sup>rd</sup> order) effects. The IO officer must not only take into account the likely resulting *adversary reactions* to friendly operations and events, but also the impact on the population and its resulting actions and reactions. IO officers can assess an operation's risk and effects.



The IO officer can use an Effects-Based Operation (EBO) model to validate effect objectives and military operations that support them.... An effects-based methodology is very much relevant in IW because it is centered on the conditions of that reality necessary to achieve success, which may not focus exclusively on an adversary. This is essential in warfare in which political and social factors are inseparable from military operations to achieve campaign objectives. And it requires IO officers to think beyond the initial operation or IO action, ensuring preparation to address collateral, or unintended, effects.

The previous figure illustrated the hierarchy of effects applied to a tactical operation focused on the adversary. We can apply an EBO model to an IW objective to identify information effects related actions, using a scenario of a commander’s intent to reduce IED network activity. The identified objectives are “AGF Leader X network activity reduced” and “Isolate AGF Leader X from external support...” The IO officer is focused on getting the 3<sup>rd</sup> order effect to occur.



## **Panel H: Leadership**

### Coordinator

BGen David Fraser, Commandant, Canadian Forces College

### Discussant

Col Jeffrey Bearor, USMC (Ret)

Director, USMC Center for Advanced Operational Culture Learning

### Presenter

Dr Joseph J. Thomas, Director, Lejeune Leadership Institute, Marine Corps University

### Paper

“Leadership in the Long War: Developing 21<sup>st</sup> Century Warriors”

### *Abstract*

The Long War is characterized by the great demands it places on the warfighter. Tactical leaders, in particular, must be particularly decisive, adaptable, and grounded in the larger strategic objectives of the fight. Those leaders must address the traditional dilemmas of mission vs. welfare of the troops (leadership), loyalty vs. honor (ethics), and risk vs. security (law of war). Are time-tested methods for leader development still appropriate or is there a need for new methods? This paper explored specific concepts:

- Inoculating warriors for Irregular Warfare
- Development in the domains of leadership, to include the physical, intellectual, and moral domains
- Reaffirming maneuver warfare by assessing critical leadership competencies; defining adaptability, flexibility, or open-mindedness; and assessing intuition vs. forethought
- Contextualizing the laws of war

### *Excerpts from this Paper*

Overall premise:

- The first step in inculcating a spirit of adaptability is to change the way we teach rather than to simply change what is taught.”

On the balance of training and education in preparing for the Long War:

- An asymmetrical environment calls upon a mindset not often encountered in entry level training or occupational specialty producing schools. Those environments are organized around the principle that knowledge, skills, and abilities will be provided and assessed. They are *training*. The asymmetric fight does demand thoroughly trained individuals, but recall the axiom “we train for certainty and educate for uncertainty.” Education is, in this context, paramount.”

On educating moral decision makers in the Long War:

- While the objective of any training program is the replication of the environment, conditions, and stresses in which skills will be employed, it is difficult (and some argue impossible) to generate the ambiguous, chaotic environment in which combatants make the most crucial moral decisions. So then what should be the objective of leader development in the moral domain? The answer lies somewhere between prudent, responsible behavior based on the laws of the nation and regulations of the service (deontology), and the thorough understanding of the consequences of our actions (teleology).

On the skills sets required of professional military educators for the Long War:

- Leadership components of the curricula of professional military education are quite often an afterthought. Proof of this fact lies in the *curriculum vitae* of the faculties of our war colleges, command and staff colleges, and career level schools. Nearly all faculty of these various levels of education are lettered in history, political science, or international relations. While these disciplines rightly form the curricular “backbone” of needed instruction, leadership theorists, behavioral scientists, and organizational psychologists have almost no presence. By actively recruiting experts from these latter three fields, the graduate colleges of our military services will help contextualize the lessons of history and current struggles. While one may argue that historians, for example, already provide such services, historians usually lack the academic background or experience to be able to recommend leader development programs based on their observations. Historians and political scientists are critical, but the traditional constraints of their disciplines often discourage or prevent their utility in shaping professional development for the current or future fight. Leavening faculty with practitioners drawn from forward-focused disciplines would provide expertise to craft professional military education for more prescriptive and active, and far less descriptive and passive purposes.

On the utility of maneuver warfare concepts in the Long War:

- If maneuver warfare was deemed important at the point of its rebirth in the 1980s when the threat was conventional and the battlefield considerably more predictable, then it is absolutely critical now, with the absence of a readily identifiable threat or battlefield. Authority must be pushed to the lowest possible level. With that authority comes responsibility and responsible leaders require thorough leadership training and education in the core competencies.

On the importance of developing adaptive leaders:

- While it is evident the current operating environment military officers find themselves in calls for skill sets more consistent with the leadership of Lewis and Clark than Patton, the military education and training structure that produced Patton remains virtually unchanged. If the current and future battlefield can be characterized by an uncertain non-uniformed enemy, vague and rapidly changing missions, cultural sensitivity of warfighters, and a chaotic environment, then leadership development models crafted in times of a certain and predictable enemy, leadership roles, and methods of fighting must be changed.

Presenter

Maj Miriam Weinstein

Israeli Defense Forces Ground Forces Command – Military Psychology Center

Paper

“Studying the Eye of the Storm: How to Describe, Evaluate and Predict Operational Effectiveness of Combat Soldiers in Irregular Warfare”

*Abstract*

This paper focused on individual performance during irregular warfare, providing insights about the possibility to influence combat behavior via selection and training procedures. Irregular warfare often includes shifts between military and civilian settings and also between high- and low-intensity missions. This requires specialization and puts relatively high emphasis on individual performance. Variables that are correlated to performance may include psychological qualities (intellectual ability, locus of control, motivation etc) Social qualities (social support, interpersonal skills, education level etc) and physical qualities (fitness, adaptability etc). This study thus explored the correlation between different variables at the individual level and operational effectiveness in the context of actual fighting.

Operational effectiveness of soldiers was measured by assessment of their platoon commanders. The evaluations were collected in three settings: The Second Lebanon war, LIC activities in the West Bank and Gaza and military training. Performance evaluations were collected using questionnaires and in depth interviews. The assessment was derived along two dimensions: Command capabilities and performance of tasks. The criteria for evaluation included reliability of the soldiers, social behavior, and trustworthiness in combat.

The “good soldier” was described as being reliable in extreme situations, highly motivated, “level-headed” and as not letting personal problems influence his performance. Those rated low were usually described as not trustworthy, showing misconduct during operations and having negative effect on their peers. Evaluation of suitability for command was found to be relatively distinct from performance level—high performance was found to be necessary but not sufficient for possessing command skills.

Next we compared those performance rates against scores from draft office tests (intelligence tests, language proficiency, general adaptability score), as well as scores from basic training. We have found that most measures have no statistical relationship whatsoever to performance level, except for peer evaluations. Scores from draft office tests as well as scores from basic training, all of which have been shown over the years to be good predictors of general success, turnover and delinquent behavior, had no predictive value of performance in combat and limited value in predicting suitability for command.

The results suggest that success in the military is not one-dimensional, but consists of different aspects—such as adaptability to the system, combat effectiveness, and suitability for command. The present research demonstrates the challenge of predicting combat behavior and predicting command for extreme military settings and calls for new research on the subject.

In all, military action requires distinct qualities for different contexts: the qualities required in training may be different from those in actual fighting. Mapping those qualities (i.e. independence, tolerance to changes, etc) might lead to improving training and selection procedures. The implications for recruiting, educating and training of military personnel for the long war are discussed.

#### Presenter

Col Nick Marano, USMC

Operations Officer, Marine Corps Training and Education Command

#### Paper

“Building Small Unit Leaders in the Long War”

#### *Abstract*

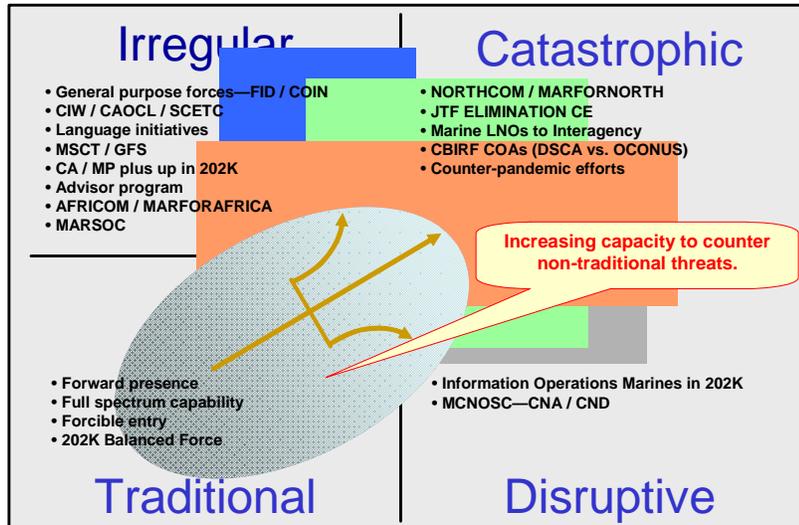
This presentation presented USMC’s view of the threat environment, then focused on the specific operational challenges of IW/COIN to regular militaries. Drawing on examples from his own experiences as a battalion commander in Iraq, as well as from recent examples in Israel’s war with Lebanon, the presenter discussed the tenets of COIN, and the implications for training and education, with particular focus on how TECOM provides training to deploying Marines

#### *Excerpts from This Presentation*

The Mid-Range Threat Assessment includes a future global threat environment characterized by the following drivers of instability:

- Terrorism / Irregular Warfare
- Ideological / Religious Extremism
- Poorly / ungoverned spaces
- Globalization
- Economics / Poverty / Health Crisis
- Rise of China
- Natural Resource Competition (water, energy, etc.)
- Science & Technology competition / advancements
- Changing Demographics (“youth bulge”, aging populations, etc.)
- Environmental Factors (climate change, natural disasters, etc.)
- Crime

In broad terms, our security challenges look like this:



11

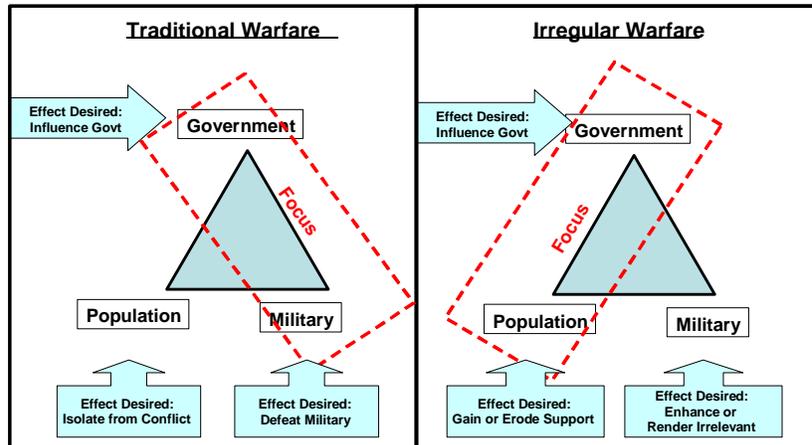
All these require the capability to perform a full range of operations. Consider this in the context of our Joint Staff’s definition of Irregular Warfare:

- A violent struggle among state and non-state actors for legitimacy and influence over the relevant populations. IW favors indirect and asymmetric approaches, though it may employ the full range of military and other capabilities, in order to erode an adversary’s power, influence and will.” (Draft Joint Definition: OSD/Joint Staff, 2 February 2007).

Our Service’s 21<sup>st</sup>-Century Vision also calibrates our efforts at TECOM:

- “...the future holds a greater likelihood of irregular wars fought in urban environments, against thinking enemies using asymmetric tactics.” It also says that the Corps must “...train, educate, orient and equip Marines to operate skillfully across the wide spectrum of operations, blending the need for combat skills and counter-insurgency skills with those required for civil affairs.”

Likewise the recent “Marine Corps Operating Concepts for a Changing Security Environment” says the Corps should “...widen the aperture through which we look for solutions... focusing on the challenges of countering irregular threats...”

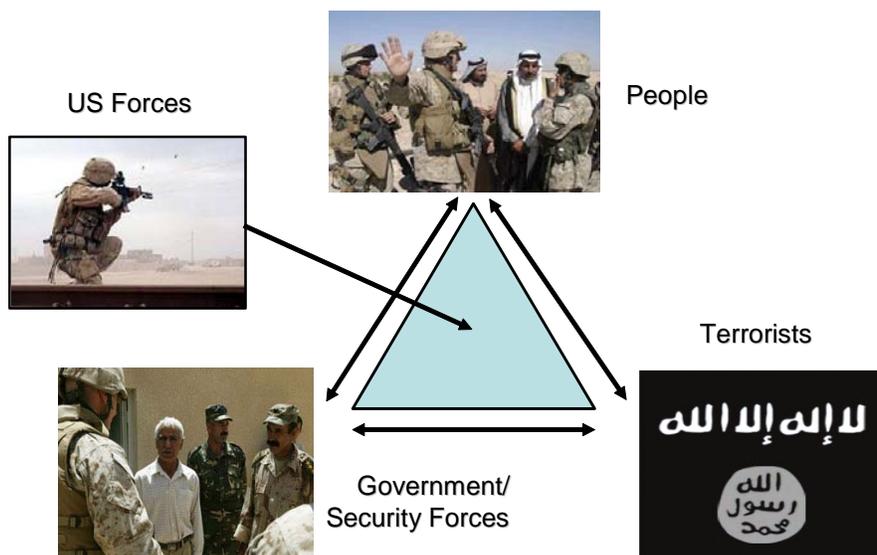


What does this all mean?

- Emphasis on the use of indirect, non-conventional methods and means to subvert, attrit, and exhaust an adversary rather than defeat him through direct conventional military confrontation
- Different focus of operations, on the erosion of an adversary’s power, influence and will; gaining the support of the population

As B.H. Liddell-Hart said, “In strategy the longest way round is often the shortest way there; a direct approach to the object exhausts the attacker and hardens the resistance by compression, whereas an indirect approach loosens the defender's hold by upsetting his balance.”

What makes IW “irregular” is the focus of its operations – the relevant population – and its strategic purpose – to gain or maintain control or influence over, and the support of that population through political, psychological, and economic methods.



The greatest danger is a regular structured military force using irregular methods. Consider Iraq 2003, or Lebanon 2006. I'd like to take that same triangle from the previous slide and modify it for a counterinsurgency situation. As we see, the three main actors each occupy a point of the triangle, the people are at the top as the support of the people is vital to both the government and the insurgency. Both of them compete for the support, at least passively, of the people. I used this metric to train my small unit leaders before departing for Iraq so they could visualize what their role is and how they must maintain an indirect, balanced approach in fighting the terrorists, developing the security forces and maintaining the support of the people.

I derived the following points, both from the USMC/US Army's COIN Manual, and from my experiences as a commander:

- Ultimate success in COIN is gained by protecting the populace, not the COIN force. We saw this with the al-Qa'im Border Police.
- The key for counterinsurgents is knowing when more force is needed—and when it might be counterproductive. Using substantial force also increases the opportunity for insurgent propaganda to portray lethal military activities as brutal.
- As the level of insurgent violence drops, soldiers and Marines may also have to accept more risk to maintain involvement with the people.
- If an assessment of the effects of a course of action determines that more negative than positive effects may result, an alternative should be considered
- While security is essential to setting the stage for overall progress, lasting victory comes from a vibrant economy, political participation, and restored hope.
- T.E. Lawrence's famous observation while leading the Arab Revolt against the Ottoman Empire in 1917: "Do not try to do too much with your own hands. Better the Arabs do it tolerably than that you do it perfectly. It is their war, and you are to help them, not to win it for them." The key word is tolerably.
- Indeed, the more effective a COIN tactic is, the faster it may become out of date because insurgents have a greater need to counter it. In fact, the bad guys do have a culture of lessons learned as the Israelis found with Hizbullah.
- Insurgents that never defeat counterinsurgents in combat still may achieve their strategic objectives.
- Indeed, young leaders—so-called "strategic corporals"—often make decisions at the tactical level that have strategic consequences.

John Maynard Keynes had asked rhetorically, "When the facts change, I change my mind. What do you do, sir?" As for the Marine Corps, the answer is that the training and education continuum emphasis has shifted towards IW/COIN:

- Unit training reflects emphasis on IW/COIN
- Formal school POIs have been reviewed and rewritten
- Increased opportunities to attend foreign PME
- Expanded FAO-like education
- Expanded opportunities for civil education in language, culture & social sciences
- Increased emphasis on security cooperation training
- Increase focus on small unit decision-making & independence across entire Enlisted PME for junior leaders.

## **Panel I: Civil-Military Operations**

### Coordinator

Dr John R. Ballard, Col USMCR (Ret) Professor of Strategic Studies, National War College

### Discussant

Col Tom Greenwood, Director, USMC Command & Staff College

### Presenter

Dr Maj S.J.H. Reijtens, Netherlands Defence Academy

### Paper

“Civil-Military Interaction”

### *Abstract*

From the 1990s onwards, the military have engaged in various peace support operations (PSOs), requiring civil-military interaction. In spite of some positive outcomes, civil-military interaction has been controversial from the onset. The objective of this paper is to identify the root causes of the laborious civil-military interaction and its implications for pedagogy within military institutions.

By means of an extensive literature study and fieldwork in both Albania and Afghanistan the following seven problem fields thwarting civil-military interaction were identified:

- 1) Relations suffer whenever military assistance is seen to supplant rather than to supplement civilian-led humanitarian assistance. In case of perceived “supplanting”, the military are viewed to be unfair competitors.
- 2) The military as well as humanitarian organisations doubt the so-called “humanitarian expertise” of the military. Although the military may command the necessary resources to extend humanitarian aid, this does not mean they know how to use these resources appropriately.
- 3) From a civilian side there is a fair amount of distrust about the military’s motives to engage in humanitarian assistance. Besides, it is feared that military involvement will compromise humanitarian aid, endangering the neutral and impartial way in which aid should be provided and ultimately resulting in humanitarian goals being subordinate to military or political objectives.
- 4) Civil-military relations should be demand-driven. This means that cooperation is temporary, depending on the needs for specific assistance and the swiftness of adjusting the military means to changing humanitarian demands.
- 5) Civil-military interaction has been prone to opportunistic behaviour concerning the use of resources and the purposes to cooperate. For instance, humanitarian organisations refused to cooperate when they suspected the military to use their information for gathering intelligence.

- 6) At a strategic level, the attitude has seemed rather reactive. A shared comprehensive civil-military vision and approach to the complex humanitarian problems in war-torn societies has been developing at a slow pace. There appears to be little monitoring or process evaluation with regard to civil-military interaction.
- 7) Lessons are learned independently and hardly institutionalised. The exchange of information and feedback are administered by dribbles between the various organisations and disciplines. There has been hardly any sharing of innovations among the actors involved in different sectors. Therefore, the extent to which these innovations have induced changes has remained limited.
- 8) Civil-military interaction between unfamiliar and widely diverging partners has been hindered by visions on collaboration that were perceived to have been developed unilaterally by one of the organisations.

The paper then discussed these problems' main implications related to the pedagogy of irregular warfare and the Long War. These implications include:

- Development of a commonly shared civil-military vision, often referred to as comprehensive approach or 3D-approach (development, diplomacy and defence).
- The question whether civil-military interaction is best served by the continuance of dedicated civic-units, or by more integrated alternatives at all levels of the expeditionary military units like the Provincial Reconstruction Teams, currently operating in Afghanistan.
- Is NATO civic doctrine (AJP-09) is still suitable if facilitation of rehabilitation is one of the main tasks of a multinational force, as this doctrine primarily focuses on civil-military interaction as a force multiplier (rather than an aid multiplier).
- The paper also addressed the training and expertise of personnel deployed and to what extent this can be improved.

#### Presenters

Dr R. Beeres, Netherlands Defence Academy

Dr Maj Rietjens, Netherlands Defence Academy

#### Paper

“Viable Cooperation and Pedagogy for the Long War”

#### *Abstract*

To achieve mutual goals, military and civilian actors have to be able to form temporarily viable structures for cooperation. In these structures, complexity has to be effectively and efficiently distributed among the participants of the inter-organizational civil-military network to be able to implement, and even adapt, the strategy. This paper used the Viable System Model (VSM) to analyze the viability of such an inter-organizational civil-military network in the context of Long Wars. The VSM systematically unfolds the necessary and sufficient functions required for viability. The five functions identified in the VSM are: (1) primary activities, (2) coordination, (3) control, (4) intelligence and (5) policy. These functions and the relations unfolded in the VSM constitute the template for the assessment of the viability of the civil-military network.

This paper applied the VSM to the cooperation between the Dutch Provincial Reconstruction Team (PRT) and civilian actors in the Afghan province Baghlan. It included cooperation in a variety of functional areas such as explosives removal, power plant construction and police training courses.

Data collection occurred during a four-week visit to Baghlan, Afghanistan, including interviews, participant observation, and structured meetings with local contractors, local authorities, police commanders, humanitarian organizations, small entrepreneurs, refugees and local villagers.

The confrontation of the VSM with the empirical data led to the following conclusions.

- Although the Dutch military held a great comparative advantage in providing safety and security, they were forced into reconstruction activities. Since most military involved had little expertise with and training in this matter it resulted in a very ad-hoc and person-driven approach.
- Since the Dutch military were frequently absent at coordination meetings there was great duplication of effort.
- There was an internal struggle within the Dutch PRT between the commander and the political advisor to control and administer the reconstruction funds leading to distrust and friction in internal cooperation.
- Due to much sensitivity there were large problems in combining information from the branches of intelligence, psychological operations and civil-military cooperation.
- There was also very little structure in the management of information, leading to a serious lack of situational awareness. Finally, there was no integral civil-military policy. This resulted in opportunistic behavior of both military and civilian actors.

The paper concluded with the implications for preparing military to carry out the unconventional tasks imposed by Long Wars, by reviewing a newly-designed course at the Netherlands Defense Academy. This course focuses on the subjects of civil-military cooperation, how to deal with foreign cultures, the notorious relationship between civil-military cooperation, intelligence and psychological operations, and the deployment of civilians as reserve officers for short-term reconstruction contracts.

### Presenter

CAPT Joseph Vorbach, USCG

National Defense University, School for National Security Executive Education

### Paper

“Bureaucratic Bilingualism in the New National Security Environment: Which Languages, Which Bureaucracies?”

### *Abstract*

This paper assessed the efficacy of initiatives inside and outside the Coast Guard that affect the effort to develop better prepared and more agile national security experts in the federal government and will recommend changes that might yield more successful outcomes.

The current Commandant of the United States Coast Guard, Admiral Thad Allen, speaks of Coast Guard personnel as being “bureaucratically bilingual” in the sense that by their professional experiences they develop the ability to interact effectively in both the Department of Defense/Joint world and the law enforcement world of incident response involving state and local partners. Given the manner in which irregular threats are likely to manifest themselves, successful US efforts to deter them demand that greater percentages of personnel from across the entire interagency achieve bureaucratic bi or indeed multi lingual bureaucratic abilities.

The Coast Guard is an interesting case study for considering this issue because, while it has exercised its “bureaucratic bilingualism” to lead effective national responses, it has struggled internally to develop and resource a properly sequenced training and education system that will yield greater numbers of personnel who possess this valued skillset. The following factors, at a minimum, inform the consideration of the Coast Guard in this context:

- Like all organizations, the Coast Guard must begin by teaching its new members the service’s culture and traditions. The challenge of walking must be mastered before one can run.
- The Coast Guard’s standing as the nation’s fifth Armed Service means that many Coast Guard personnel learn to speak “joint” by virtue of their assignments, but new mission tasking in the wake of the terrorist attacks of September 11, 2001 has led to the need for greater numbers of personnel with this capability.
- The Coast Guard has been a leader in the Joint Interagency Task Forces that are widely regarded as successful experiments in interagency coordination and might serve as useful models for enhanced cooperation in the future.
- Before the National Response Plan, many but not all Coast Guard personnel gained fluency in earlier iterations of the Incident Command System. Still, it became clear in the wake of 9/11 that the service needed more personnel who understood that system.
- The Coast Guard is a formal member of the National Intelligence Community and is making significant investments in personnel and resources to support improved collection and sharing of information vital to efforts to counter transnational security threats.

- The Coast Guard is a plankowning member of the Department of Homeland Security with four years of experience pursuing higher levels of interdepartmental coordination among operational agencies with border security missions.

Studying the Coast Guard with an eye on the challenges of developing “bureaucratically multi-lingual” personnel raises a host of worthy questions related to common needs and specific learning requirements in the joint and interagency context:

- How much can be accomplished at different stages in a career?
- How should the training and education be sequenced?
- How can bureaucratic cultures be changed in order to increase the value placed on joint and interagency experience?

*Excerpts from this Paper*

The question of how to get the national security bureaucracy of the United States to function as nimbly as possible in the face of threats like al-Qaeda is essential. Exploring the “bureaucratic bilingualism” of the Coast Guard yields useful perspective on the benefits and limits of being an organization with this capability.

Notwithstanding the overwhelming evidence suggesting that a problem in the way that national security is understood has been identified, the durability of existing bureaucratic cultures makes transformation toward a new structure quite challenging.

In the words of the scholar Thomas Kuhn, whose theories on the history of science have been influential across many disciplines, “frameworks must be lived with and explored before they can be broken.” In the context of US national security architecture, examples of “frameworks being lived with and explored” include the consolidation of agencies and programs into a new Department of Homeland Security, the creation of a Northern Command, the reorganizations within the national intelligence community, and the NSPD-44 process for stabilization and reconstruction operations. In other words, the current response to a collective recognition that better interagency interoperability is needed to improve national security has been the creation of new subsets within existing cultures or the consolidation of existing cultures under the umbrella of a new executive department. More radical approaches that could lead to the development of a new national security culture in the United States, might emerge from, for example, the development of Africa Command, and the establishment of joint interagency operations centers in the nation’s ports.

Because the current security environment highlights a constant tension between security and commercial imperatives, and because so much of global commerce moves by sea, Coast Guard fluencies in traditional non-security realms (like international shipping and navigation safety) have been recognized for their potential security value now that the risk of maritime terrorism has grown.

Wednesday, 31 Oct  
Key-Note Speech

**ADM Eric T. Olson, Commander of Special Operations Command**

*Excerpts from ADM Olson's Comments*

Today I'm going to talk mostly about the Pedagogy of Irregular Warfare from my perspective, as the Commander of SOCOM. We'll talk about what we're doing well, what we're not doing so well, the challenges we face, and what sort of transformations we will need to undergo to get it all closer to being truly "right."

Every organization is unique in several ways, so let me talk for a couple of minutes about what makes the organization that I serve unique.

Through the Nunn-Cohen Amendment to the National Defense Authorization Act of 1986, the Congress formed the United States Special Operations Command (it's fair to say that Congress imposed SOCOM on a resistant DOD), largely in response to the findings of the Holloway Commission's report on the failed mission to rescue the American hostages being held in Tehran, Iran. We are the only Combatant Command to be formed in this manner by a clear act of legislature, and for good reason: the services were in fact quite strongly against it. They saw the transfer of a portion of their forces to a new command as a losing proposition. Only the Marine Corps, however, won the argument, and SOCOM was born in 1987—three-quarters Joint.

At the time this measure was impressive on face value: Congress had defied the Pentagon and created an organization quite different from all others. We didn't know then how truly visionary this act was, nor that this organization's relevancy would be so thoroughly tested less than 15 years later when the attacks of 9/11 changed our world.

USSOCOM is now composed of four service components: the United States Army Special Operations Command, the Naval Special Warfare Command, the Air Force Special Operations Command, and our newest addition: the Marine Corps Forces Special Operations Command. We also have a subunified command: the Joint Special Operations Command (JSOC). In 2001, before the 9/11 attacks, we had about 29,000 active and 14,000 reserve component personnel, for a total of 45,600 including our civilian workforce. As a result of the increased demand placed upon SOF due to the GWOT, we are growing, and are on track to exceed 58,000 personnel by the end of FY 2011. That growth is made even more significant when you consider we moved our CA and PSYOP forces back into the services, so the *real* growth of our active force is actually 16,695 personnel.



## SOF Core Activities

UNCLASSIFIED

- Direct Action
- Special Reconnaissance
- Unconventional Warfare
- Foreign Internal Defense
- Civil Affairs
- Information and Psychological Operations
- Counterterrorism
- Counterproliferation of Weapons of Mass Destruction
- Synchronize DoD Efforts in the GWOT

Here is a listing of SOF's core activities. Take a look at them while I read an excerpt from the report "Irregular Warfare Leadership in the 21<sup>st</sup> Century: Attaining and Retaining Positional Advantage," by the McCormick Tribune Foundation.

- For the purpose of this report, "Irregular Warfare Family" includes, but is not limited to: Irregular Warfare, Irregular Challenges, Insurgency, Counter-insurgency, Terrorism, Counter-terrorism, Asymmetric Warfare, Guerrilla Warfare, Sabotage, Subversion, Surrogate Warfare, Foreign Internal Defense, Stability, Security, Transition and Reconstruction Operations, Psychological Operations, Civil Military Operations, Strategic Communications, Information Operations, Informationalized Warfare, Intelligence and Counter-intelligence Activities, Computer Network Attack, Trans-National Criminal Activities, Law Enforcement Activities Focused on Irregular Adversaries, Illicit Financing, Piracy, Use of Front Organizations and Shadow Governments.

I'm guessing you all noticed some pretty stark similarities between the two lists. What is my point in all this? Well, it's twofold:

- Much of what SOF does lends itself to an inherent ability to conduct Irregular Warfare
- The demands of an IW campaign far exceed USSOCOM's capacity.

Much of that list I read from requires capabilities that can, should, and to a great extent, already do reside in big Army, Navy, Air Force, Marine Corps or in other agencies of our government. Irregular Warfare is not all-encompassing, but it does require solutions that involve all the aspects of DIME. A problem we have as a nation, however, is that there is no central authority or concept for conducting IW.

Specific to DOD, if you picture a scale with SOF at one end, and the big services at the other, you can imagine that at either end you've got activities that each force does that do not overlap: Specific hostage rescue missions might be on the SOF end, and at the other

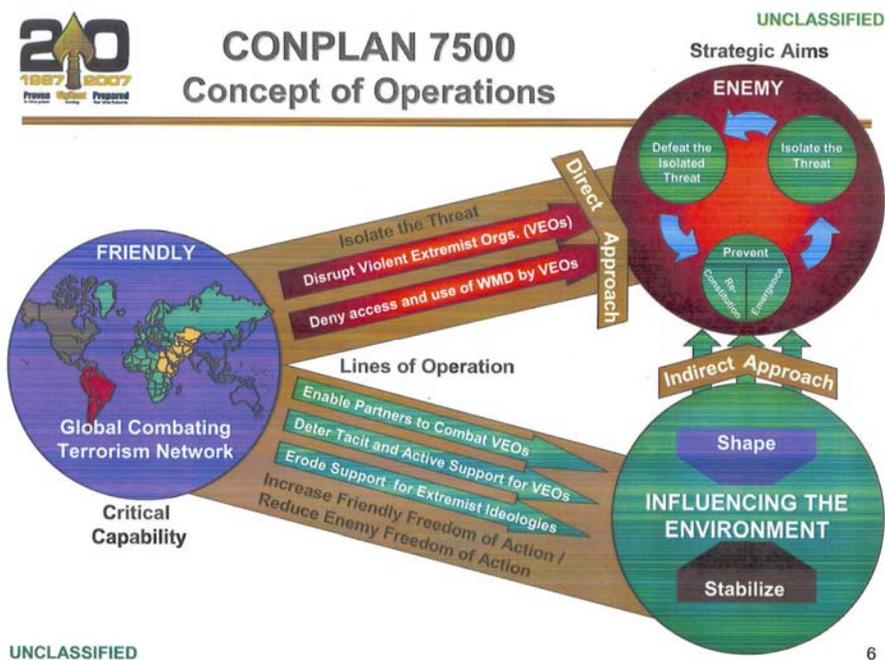
end, you might have Tank Warfare, or Offensive Counterair. In the middle, however, there is overlap: Civil Affairs, PSYOP, UAVs, AT/FP, MWD, EOD, MIO, ATC, etc....

In the middle we have these numerous acts of random pursuit of excellence, with no referee. Everyone is trying to do the right thing, and fill a void, but there is little to no unified game plan. This leads to redundancies—and conflicts—of effort and to gaps in capabilities and insufficient capacities. Now if we add in the other non-DOD aspects of DIME, you can see how the problem gets pretty complicated, especially with no one at the helm.

All this said, let me give you a SOF perspective on how we view Irregular Warfare under SOCOM's responsibility to plan and synchronize DOD activities for the GWOT. Then we'll get down to some of the challenges we face across our forces, and how we educate our men and women to prepare for them.

I want you to take a look at this slide and realize that what you are looking at is the DoD Global War on Terror Plan boiled down to a single slide.

- The Direct Approach does two things for us: it prevents attacks on our soil, and buys us time for the decisive part to take place: the Indirect Approach.
- The Indirect Approach is what will influence the environment the enemy comes from—making it harder and harder for him to operate, recruit, live, train, or preach from. This approach is generational, requiring patience, consistency, and will.



The only problem with this slide is in the representation of the priorities...take a quick look at the slide and notice the colors: red is for Direct Approach lines of operation, while green represents the Indirect Approach lines of operation. But we inherently see things listed top-to-bottom as a prioritized list.

To better represent how we at SOCOM view the relative importance to ultimate success of these lines of operation, we need to turn this chart upside down.

- This more accurately depicts the priority of actions: Indirect is prioritized above Direct, and the War on Terrorism gains primacy over the “War on Terrorists.”



Another thing that I need to point out is that this slide is two dimensional. The red and the green lines are good at giving a broad brush idea of what the War on Terror is about, but the truth of the matter is that the slide is imperfect. Often indirect approach operations are encompassed in direct action missions. One absolutely can not categorize people, or units or capabilities as red or green, direct or indirect—but *activities* can be direct or indirect.

In front of you is a great example of what I'm talking about. This is a six-month snapshot of what a single Combined Joint Special Operations Task Force did recently, headed up by a United States Special Forces Group. While many of the numbers reflect direct action type missions, there were many other indirect approach operations that carried the lion's share of the influence in the region, and have made great progress towards long term stability in the area.



SOF’s unique core activities tend to naturally flow into the conduct of Irregular Warfare, and we definitely bring something to the table. But what of Irregular Warfare, really?

Let’s refer to the “Official Definition,” in Joint Publication One:

- Irregular Warfare is a violent struggle among state and non-state actors for legitimacy and influence over the relevant populations. IW favors indirect and asymmetric approaches, though it may employ the full range of military and other capabilities, in order to erode an adversary's power, influence, and will.

We need to frame the problem. This is how we have become so good at what we do: we are able to take any problem, no matter how large, complicated, or complex, and break it down into tiny, solvable parts. We then take those smaller problem-parts and study them to see how they are like some other similar problem we've faced in the past, and then dispatch the new problem-part much the same as we'd done the previous one.

This is where templates, Military Decision Making Processes, and Standard Operating Procedures are born, bred, evolved, and modified. However, it may just be that this strength of ours could also be our weakness when confronting the problems of the world today.

Some of my officers down at SOCOM are currently working to nurture what we call the Global Combating Terrorism Network (GCTN). This is basically a conglomeration of not-necessarily-allied organizations of countries, states, charity organizations, businesses, individuals, and NGOs—an *informal* network—that has the common interest of preventing the spread of terrorism in the world. These officers are actively engaged with many business leaders for the purpose of discovering what we as an organization can do better, or maybe just differently. One of these business leaders happens to be a very

successful communications consultant. During one of their conversations, the consultant told my guys: "... your problem as a community is that you plan too much..."

Now, think about that: plan *less*. I have to be honest with you: that goes against nearly everything I've learned or been taught over my career. We *always* at least have a plan from which to deviate. But here, we have this very successful person telling us that maybe what we need to do is plan less...

Let's face it, a lot of what we do and how we think is out of date and obsolete. The words and models we use are flawed:

- Our doctrine and templates don't fit the situations we are confronted with
- We have yet to really 'get into the head' of a terrorist insurgent
- We can explain what they do, but we have a long way to go before beginning to understand why they do it....

Our challenges aren't limited to our language or operational models, either: even our organizational structures are outdated—*some* are. Over the past several years. We have struggled to adapt to the new nature of warfare by creating new organizational structures and processes where we thought the existing structures or processes didn't work. However, we never dismantled the *old* ones.

Let's use Strategic Communication as an example—a new concept that stands both alongside and around Public Affairs, Psychological Operations and Military Support to Public Diplomacy. We now have a

- Strategic Communication Integration Group
- An office of Support to Public Diplomacy
- A communications focused counterterrorism coordination center
- We still have all of our PA, PSYOP, and MSPD organizations intact.

The end result is that we now have about twice the force structure oriented around doing generally the same thing, without broad understanding of who does what, or more importantly, who has what authorities. Of all the areas we operate in, perhaps one of the most important ones for us to be coherent is in what we say, but we've missed the mark.

A lesson here is when you create a new structure or organizational process, be sure to bring everyone over to the new way, and get rid of the old.

Another challenge we face brings us back to the IW definition—this is not necessarily even a new concept, if we consider the USMC Small Wars Manual, the Frontier Wars after the Civil War, the Philippines Insurrection, the OSS operations in WWII.

IW is really about applying military and other capabilities in non-traditional military environments, be they human, political, terrain, etc. My point about the dissent as to the definition is to illustrate that even our vocabulary is insufficient to effectively grasp what we're trying to accomplish. In our own English language even within DOD we speak many dialects: Army, Navy, Marine, Air Force. We have words like "IO," "PSYOP," "CA," "Joint," "intelligence," "detainee," "torture," "partner," "extremist," "jihadist,"

“Strategic Communication...” Some of these terms don’t even mean what they used to. This is tough and important stuff, and we need to recognize that our vocabulary is limited...

And when we try to translate our inadequate words into other languages, the problem is exacerbated. For example, take an inaccurate term, translate it into Arabic, Farsi, or even the Queen’s English, and you are at risk of getting an entirely different interpretation. My favorite example now is the word “war”. For us, it can mean many things, depending on what we’re warring against: terrorism, poverty, crime, hunger, disease, even a war of words. In fact, many of the contexts where we would use the word "war" have absolutely nothing to do with violence. However, if you translate the word war into Arabic, it becomes *Harb*, which is about real *war*: it includes violence; something along the lines of a War on Hunger then takes on an entirely different meaning. This language deficiency is really important in the context of “Joint Operations”—or even more appropriately—“Combined Operations.”

Our ability to operate in a Joint/Combined environment also it depends on our ability to properly apply the terms and concepts of what exactly joint and combined are. First, I’d like to address the concept of Joint Operations, and how they are often applied, or misapplied.

Often, when someone mentions Joint Operations, one thinks of integration at the tactical level: an Army soldier fighting in the same unit as a Marine, or SEAL, but this is not actually what it should be.

Joint Operations are not about element level integration. They are about

- Integration on the Staff
- Learning the strengths and capacities of the other service units and how they communicate and operate together
- Integrating these units at the operational and strategic levels so that the whole becomes greater than the sum of the parts.

Joint Operations is only part of the solution: it goes beyond that, into Combined Operations. Working with our partner nations and building partner nation capacity is another concept we are confused about. Too often we look at this as a single group of operations. We plan and train the same, when in reality this concept is actually done at three separate and distinct levels.

- 1) We train a nation’s forces to literally fight integrated with us and cover each others’ sixes. Iraq is the obvious example of this, and what we call Combat FID.
- 2) We train a nation’s forces to be able to stabilize their own national situation, and protect its own borders—these may not be partners, and are usually not forces we expect to ever bring with us to fight alongside us in another country such as Afghanistan. This is what we know traditionally as Foreign Internal Defense, or what I call Enabling Sovereignty.
- 3) On yet another level, we organize, plan, and train with countries with whom we absolutely intend to fight alongside. Our NATO Partners in Afghanistan are perfect examples. *This* is what I believe is meant by true Building Partner Nation Capacity

I also believe that when we are planning our combined engagements, our theater security cooperation plans, that we need to understand the purpose.

As we train our partner nations and build their capacity and/or their ability to maintain their own sovereignty, we need to look inward to ourselves to always evaluate our own capability and capacity to teach. We need to take a hard look at how we only organize, train, plan, and equip our forces.

Nowadays, you cannot pick up a book or policy document about current DoD military issues without discovering that Irregular Warfare is the new “in” style for fighting the GWOT, yet if you pick up a budgetary document, or a training curriculum, you will find that they tell a much different story. Funding for the entire Irregular Warfare Roadmap across the FYDP is just over \$2B. That's less than 1% of DOD's budget. The resourcing issue is the subject of an entirely different speech....

What I really want to address is our current challenge of educating the force in how to act when the element in charge of the Irregular Warfare piece (*whoever* that may be) is the supported commander, rather than the supporting commander. This is an important distinction, because right now in SOF we have irregular elements working for conventional commanders. They are excluded from much of the campaign planning due to old paradigms. There are pockets where this is not the case, and where progress is made, but that is largely at the tactical level, seldom at the operational level, and rarer still at the strategic level.

Part of this problem is in the way we grow our leaders. Take a look at our PME curricula: while changes are being made—and Marine Corps University is exceeding other PME institutions in adjusting—much of the courseware is still oriented towards the conventional battle mindset. Across DOD, most of the IW courses are still electives, and are therefore avoidable by those not interested in them. We need to change that.

The good news is that you have behind you some of the fastest, smartest, most aware and educated youth ever. They are far more advanced than we are or ever were. There are lieutenants out there thinking at the O-5 level—and they have been hardened and educated in combat. Young kids know more about cell phones and computer network operations than any of us ever did or will. With the proper education, there is much hope for them and us. But it is up to us to set the tone.

We must start the ball rolling in the other direction: towards actually thinking like Irregular Warriors. Once we acknowledge that it is far more challenging to train and educate a soldier to walk into a strange village and knock on a door rather than blow it down, then we will be educating along the Indirect Approach Lines of Operation.

Now, getting back to my comment about our consultant, I cannot let you out of here without at least giving you my take on what he said about planning less, because I can see some of you get uncomfortable even as I say it right now—as I was when I first heard it. What I think he was saying is that we often get too attached to our plans. Planning is an

arduous process, and it can even be painful. Because of this, we often get wedded to the plan, or at least to the direction the plan is headed, or to the mindset of the plan. It is this notion of being wedded to a particular plan, direction, or mindset that I think he was talking about.

Absolutely, we should still plan—this is what makes us who we are. However, in order to meet the challenges of the world in which we live today, what we need to do is start *planning to deviate from the plan*—to transform our thinking in such a manner that we are able to completely change directions from where the plan was originally headed. When the map differs from the terrain, you've got to believe the terrain. This is not easy, and we are slow to change, particularly when we're talking about something that defines us, such as planning, or how we are organized.

I believe that our organizational structures not only have not adjusted well post 9/11, but they haven't even adjusted well post Cold War. We seem to acknowledge that the next enemy we confront will probably not be in a frontal war, yet we're still organized in brigades and divisions—we have not adjusted our Order of Battle to fit the new Order of Battle. Change is hard: We are slow to accept it and to even think about it.

If you still disagree with me on that point, consider this: back when we had the draft it took three weeks to teach a soldier how to jump out of a plane with a gravity actuated parachute on his back. Now, fast forward to today, 34 years after the draft ended, and we are still taking three weeks to qualify a motivated, fit, eager volunteer how to do the exact same thing. You go to a civilian drop zone and make a freefall parachute jump this weekend. We have the right idea about changing, but we are not quite to the point where our actions follow our words.

This is the challenge for us for us: something that we *must* understand. We *must* be able to change. In the words of JFK: "...time and the world do not stand still. Change is the law of life. And those who look only to the past or present are certain to miss the future."

I am counting on you to get it right.

**Panel Session III**  
**Presentations: Wednesday, 9:45-11:15 am**  
**Q/A: Wednesday, 11:15-12:00 pm**

**Panel J: Culture**

Coordinator

Dr Kerry Fosher

Command Social Scientist, Marine Corps Intelligence Activity

Discussant

Dr Brian Selmeski

Director of Cross-Cultural Competence, Air force Culture and Language Center;  
Research Associate, Centre for Security, Armed Forces and Society, Royal Military  
College of Canada

Presenter

Dr Allison Abbe, US Army Institute for Behavioral & Social Sciences

Paper

“Developing Cross-Cultural Competence in Military Leaders”

*Abstract*

Full-spectrum operations and irregular warfare increasingly require military leaders to anticipate the actions of, interact with, and influence individuals and groups whose cultural context differs widely from their own. The Army and other services have responded by increasing the availability of language and regional training. These efforts develop the knowledge and verbal communication skills needed to understand and interact with a particular population in a particular location. However, a broader cultural capability is needed for the Long War, requiring military leaders to adapt successfully to any potential cultural setting. Meeting this capability will require the development of culture-general knowledge and skills as a necessary complement to language skills and regional knowledge. Whereas language and regional expertise provide the depth to operate in a specific culture, cross-cultural competence provides leaders the breadth to operate in any culture.

Cross-cultural competence refers to a set of cognitive, behavioral, and affective/motivational components that enable individuals to adapt effectively in intercultural environments. Although empirical research has not yet addressed the structure and development of cross-cultural competence in military personnel, a large body of literature on cross-cultural competence and related constructs has accumulated within other contexts. Research has examined the variables associated with intercultural

effectiveness among expatriate student, manager, and missionary populations, as well as Peace Corps volunteers and the medical professions. Although critical differences exist between the goals of these populations and those of the military, this literature provides a strong conceptual and empirical foundation for understanding cross-cultural competence in military operations. The traits associated with successful intercultural adaptation in expatriate managers and students are equally relevant to the military, even though the outcomes of interest are very different. For example, tolerance for ambiguity, self-regulation, and social initiative are beneficial in any unfamiliar environment. In addition, recent meta-analyses have shown that interpersonal skills and cultural flexibility are more strongly associated with intercultural effectiveness than are verbal language skills. Such findings provide support for the role of culture-general skills that are currently not integrated into cultural training by the different services.

This paper described a model of cross-cultural competence intended to organize the contributions of this research in a coherent, testable framework. In the proposed model, the development of cross-cultural competence is influenced by antecedent traits, environmental, and experiential factors, such as prior intercultural experience. Cross-cultural competence, in combination with regional knowledge and language proficiency, contributes to intercultural effectiveness in work, personal, and interpersonal domains.

- The work domain includes technical aspects of job performance and adjustment to work conditions in the new cultural setting
- The personal domain consists of psychological and physical adjustment (i.e., health and well-being), including the maintenance of ethical standards
- The interpersonal domain refers to one's ability to communicate effectively, build relationships, and exert influence across cultural boundaries

In addition to outlining a model and reviewing previous empirical research on predictors of intercultural success, this paper reviewed previous attempts to identify and assess the characteristics that comprise cross-cultural competence. Assessment represents a critical step toward identifying individuals best suited for certain assignments and in evaluating training effectiveness. Development of cross-cultural competence in military leaders can be beneficial in meeting immediate needs for a specific region, but is absolutely essential for meeting the broader demands of the Long War. This paper will help further that capability by identifying the component knowledge and skills of priority for education and training.

#### Presenter

Dr Keith Brown, Brown University

#### Paper

“All They Understand is Force: Debating Culture in Operation Iraqi Freedom”

#### *Abstract*

Drawing entirely on public, open sources, the paper traces this recent development of US military understandings and uses of cultural knowledge. Military education, training and operations reveal complexity and diversity that demand empirical study. In particular, in

Operation Iraqi Freedom (2003-present) the author finds an internal, critical theoretical disagreement between a model of culture as a static, or slow-moving, property of a constructed “other,” embraced by mainstream thought in the Army, and a competing sense of cultural process as dynamic, interactive and emergent, emphasized by Special Forces and the Marine Corps.

This disagreement feeds off and into longer-running debates within US military circles, demonstrating that the US military’s engagement with the concept of culture is far from monolithic: different services’ approaches are shaped by their own histories, driving a rival emphasis on weaponizing culture, and culturalizing warriors.

#### Presenter

Dr Paula Holmes-Eber, Professor of Operational Culture, Marine Corps University

#### Paper

“Mapping Cultures and Cultural Maps: Representing and Teaching Culture in the Marine Corps”

#### *Abstract*

The cognitive maps (or schemata) that structure the way we see the world serve to organize the information that we receive and help us to make sense of it. These mental maps are culturally bound—deriving from a person’s cultural beliefs, values and world view. Because one’s cognitive maps stem from and reinforce cultural beliefs and values, studies of the transmission of cultural schemata have also significantly informed our understanding of teaching and learning styles around the world. Culturally based cognitive maps appear to determine the kinds of knowledge transmitted from generation to generation, and the manner in which it is communicated and taught. While culturally based cognitive maps allow individuals to function in a complex world where they are barraged by non-stop information, our cultural maps also limit and restrict our understandings, particularly of unfamiliar information.

This paper focused on the cognitive schemata that underlie Marine pedagogical methods and Marine learning styles. Using ethnographic methods of participant observation and interviewing the author found that Marines rely heavily on visual representation of information to learn and process information. The author noted that the Marine Corps’ emphasis on providing information quickly through power point presentations and two dimensional maps and graphs does provide rapid, easily comprehensible information that can be used to analyze positions and movements on a conventional physical battlefield. However, when this visual approach is translated into mapping and graphing cultures, analyzing them as one would physical terrain (using terms such as “human terrain” and “human environment), much of the complexity, fluidity and dynamic nature of the cultural factors affecting the battlespace can get lost. The paper concluded that the Marine Corps’ visual approach to learning and teaching—while well suited to developing leaders who are skilled in planning conventional kinetic military operations—is much less effective in teaching irregular warfare concepts and skills.

*Panel Discussant's Summation and Discussion of Papers: Dr Brian Selmeski*

First, I would like to offer some general comments on the panel and conference.

- This is a conference on pedagogy, the art/science of teaching; however, the vast majority of our discussions thus far have focused on curriculum, the particular courses of study. This tendency is understandable in a military context, but not the most productive course.
- Broadly speaking, the three papers on this panel all focus not just on “culture” as an abstract concept, but on what I call “cultural learning.” Taken together, they suggest that PME needs to focus less on “culture tasks” (e.g., do not show the bottom of your foot) and more on how to understand and adjust behavior based on cross-cultural conditions and culturally-determined conditions (success looks different from culture to culture).
- PME is about shaping future generations of military professionals, thus it is transformative and focused on the *longue durée*. That provides us a luxury that operational and training units do not have: We can and should ensure we have rigorously thought our terms, concepts and objectives all the way through before we get too far along with implementation (doing so concurrently, not sequentially). Einstein said that given an hour to solve the world’s problems he would spend 59 minutes thinking and 1 minute acting. We should do the same.
- As educators, the culturalists in the PME system need to recognize that there is a time to push our students, to help them challenge counter-productive assumptions. There is also a time to help them make sense of the world when experience has turned their world upside down. The same goes for our work with policy makers, planners, etc. In brief, evolution not revolution.
- Culture is not just relevant at the tactical level; it also influences decisions and actions at the operational and strategic level. Similarly, as important as culture is for counter-insurgency and irregular warfare, we should not forget that it is an important variable across the rest of the operational spectrum as well: conventional, disruptive and catastrophic.
- Nor is culture something that only the adversary (or non-Americans) possess. “Our” culture (or cultures) is as critical to understand and shape as is theirs (however we define “them”). So, while the military will judge our efforts primarily on the basis of utility, academics will do so primarily as a result of our validity. In brief, satisfying both conditions (and audiences) is required to ensure not only mission success, but institutional effectiveness.

Second, allow me to note that each of these excellent papers contributes to our better understanding three distinct but inter-related domains of culture.

- Dr Abbe’s paper emphasized, amongst many other important points, that cultural knowledge and skills are insufficient to ensure success. We must also develop the attitudes or affect that Soldiers and Marines require to be cross-culturally competent. This occurs primarily through acculturation into the military, not in the classroom, and is thus a significant challenge.
- Dr Holmes-Eber’s presentation complemented this by stressing the cognitive aspects of cultural learning. She demonstrated how Marine requirements for speed and simplicity

drive and guide these efforts, then highlighted some of the consequences of applying these principles to culture. Any effort to understand or operationalize culture is messy and slow, think VUCA.

- Dr Brown's paper then provided a rich particular example of how a cultural concept such as "wasta" can be understood – if the military so chooses and draws on the right experts – as an example of a transferable principle like reciprocity. This, in turn, can suggest general operational approaches and educational strategies such as relation building and exchange.

Finally, I will close with a few personal thoughts on the topic.

- Over the past several years, I have shifted from being a "culture advocate" within the military to a "scoper of expectations." Now that DoD has bought into culture as a concept, it falls to people like the presenters on this panel to caveat our remarks by noting that while culture is a critical issue, it is not a magic bullet. Nor does it supplant the sort of regional or military learning required for success and effectiveness.
- As DoD has embraced culture, it has had to bring in more outside experts. To be most effective, these individuals need to remain insider-outsiders. Only in that way can we help bridge between academia and the armed forces, our disciplines and others that have longer track records in PME, host nation populations and the military, and so forth. This will likely require greater tolerance for what may appear as "eccentricities" than usual.
- Cultural education is transformative; it changes both the PME system and, gradually, the institution, making it more effective in cross-cultural contexts. To do so, however, requires broad and sustainable approaches. Today, we are an internal insurgency, influencing the PME curriculum. Next we have to institutionalize our efforts by addressing the pedagogy.

## **Panel K: Preparing Tactical Level Leaders**

### Coordinator

Col Joseph Osterman, USMC, Director, Expeditionary Warfare School

### Discussant

LtCol Daryl Campbell, AUS, Australian Liaison Officer to MCCDC

### Presenter

Adam Sikes, USMC Center for Advanced Operational Culture Learning

### Paper

“Adaptability and Creative Decision Making in Irregular Warfare”

To be effective in irregular warfare for “The Long War” the US military needs to improve adaptability and decision-making capabilities across all ranks. This will allow servicemen and women to effectively execute irregular operations from the beginning of the mission as well as adapt to their dynamic environments as conditions evolve over time. The goals of this paper are three-fold: (1) address why the military needs to improve training and education for adaptability and creative decision-making, (2) identify some of the military-specific components of adaptability and creative decision-making, and (3) provide some recommendations for improving education and training for adaptability and creative decision-making.

The Quadrennial Defense Review and multiple other Department of Defense vision and guidance documents identify the need for the military to improve its conduct of irregular warfare missions. To date, there is not a joint doctrinal definition of irregular warfare. However, almost every attempt to provide insight into irregular warfare describes a situation that will require servicemen and women to make rapid and creative decisions in unconventional environments for which the military cannot specifically prepare in advance.

For example, in the beginning of Operation Iraqi Freedom, the United States Marine Corps had not trained nor possessed in adequate numbers forces that were proficient in advising foreign militaries. Despite this, Marines were assigned advisor missions and were required to work closely with Iraqi Security Forces. The Marines that were successful were those that could adapt to their new environment and make creative decisions for a mission they were not trained to perform. In another example, US commanders were trying to identify and target insurgents that hid among a civilian populace. In a counterinsurgency, following conventional doctrine developed prior to OIF would not only fail to identify the insurgents, but would also probably create more insurgents as the traditional tactics and techniques used in military situations would alienate the civilian populace. Subsequently, commanders adapted to their environments, thought unconventionally about the issues they faced, and made creative decisions to target the enemy.

In some ways these examples can be considered successes and pay tribute to the “can-do” attitude of the US military. Nevertheless, it took years to improve in these areas on a large scale. Individuals were successful, but that was because of their unique abilities. As a whole, adapting to these irregular environments took a very long time and to date the military’s ability to adapt is still not adequate.

The failure to rapidly adapt to irregular environments and make unconventional and creative decisions from the beginning of a mission is one of the contributors to the hostile environment seen in Iraq. If the US military does not improve its ability to adapt in irregular environments, future conflicts have the potential to yield the same results seen in Iraq. Improving training and education for adaptability and creative decision-making in the military is one of the critical components to success in future irregular environments.

Some specific questions this paper addressed included

- Why is adaptability and creative decision-making important for success in irregular warfare?
- What characteristics of adaptability and creative decision-making does the military fail to formally address and incorporate into training?
- What aspects of military training and education need to be adjusted to create effective adaptability and creative decision-making capabilities in servicemen and women?
- What are methods to educate and train military personnel to be adaptable in irregular warfare environments?

#### Presenter

Capt Barrett Bradstreet, USMC, Instructor, US Naval Academy History Department

#### Paper

“An Ordinary Superman”

#### *Abstract*

The central premise of this paper was that durable results in an unconventional military context come in actions that are not entirely dramatic, but are grounded in the traditional attributes and skills of conventional military units. The basic tools of regular Marines, whether exhibited by general-purpose or more specialized troops, will be more effective than any other possible and practical measure.

Conversely, the presenter cautioned listeners to be wary of the silver bullet, in the form of a potential *deus ex machina* based on a (1) technological fix, (2) a kinetic fix, or (3) an expert’s fix. In different respects, the pursuit of such options can be a self-defeating enterprise. This is not to embrace the glories of amateurism, but to assert that specialists and experts both will need to be exhibit patience and flexibility. Rather than a *bona fide* superman, this author suggested the need for something altogether more mundane: a more ordinary superman for a more irregular problem.

This paper aimed to address what attributes Marines and soldiers should bring to an unconventional military effort and what specific measures will foster those attributes in our forces. The analysis is based on two deployments to Iraq between February of 2004 and December of 2005 leading infantry Marines at the platoon level, as well as experience as an advisor to Iraqi Security Forces.

The paper's thesis was based on four distinct premises:

- This fight is not just for experts: grunts can do this graduate work. Counter-insurgency and unconventional operations more generally are quite similar to all those parts of a person's life that do not involve deadly combat.
- Persistence and patience will pay. Stability and security will be wrought, if at all, by a methodical process.
- Accept risk, discomfort, and setbacks. The hazards to be endured and austerity to be maintained requires a certain ethos of discipline, if not masochism.
- Show Human Emotion. Leverage Personal Connections. Only the trust and confidence of local partners will transform your actions from "give a man a fish," to "teach a man to fish" in nature.

#### *Excerpts from this Paper*

There may be some pathology in our relationship to new technologies. What seems pernicious is the implicit promise that some device will make life easy for the counter-insurgent, that technology alone can deliver a technical solution to human problems. By this promise, the prospect of a *cure*, so to speak, poisons the work of *treatment*.

The current practice of counter-insurgency involves a novel breed of actor: the private contractor.... Recent accounts have highlighted shortcomings of certain contractors, and these accounts raise fundamental questions about the status and suitability of this class of actor in such military settings. Surveys and investigations highlight a shocking litany of foul-ups in reconstruction. This contrasts with more positive assessments of reconstruction under the so-called Commander's Emergency Response Program (CERP). The significance of this contrast is that the more effective variety of reconstruction represents the collected common-sense judgments of many particular (conventional) military commander while the less effective represents the collected expertise of major international construction firms. For reconstruction, expertise shows itself less effective than common-sense.

Doctrine today introduces the compelling notion that counter-insurgency in particular can be understood as an intricate "mosaic war" subject to counter-intuitive, even paradoxical phenomena. This work is difficult; worse, maybe this work degrades the skills of the conventional war fighter.... Thus, there are two problems with using plain grunts to do your counterinsurgency: They will fail you *and* you will ruin them for other missions.

Some softer version of this line of reasoning seems to animate certain bold proposals for a new direction in building the armed forces... many seek to expand the size and use of special purpose units.

Why not use conventional units in the long war, then? In summary, competing alternatives exist. On the one hand are those who seem to seek a quick fix through technology, direct and violent action, or special expertise. On the other hand are more thoughtful observers who embrace a more patient approach, but are dubious about the suitability of general-purpose troops to do such work.... Nevertheless, there is a certain lack of vision or imagination in such an interminable hunt for a silver bullet.

In discussing what's novel about a Marine prepared for the *long war*, let's not overlook the relevance of conventional training. This collection of skills and concepts is key to what makes a general-purpose unit suitable for missions in a place like Iraq. Most apparent is the fact that such troops *can* "go kinetic" and deliver breathtaking violence. The application of violence and its possibility makes security *happen*, if you will, in unsettled places. More subtle is the advantage lent by habits of thought and action in the conduct of operations.... Through *Mission tactics*,... subordinates apply a maximum of discretion and ingenuity within limits established by a commander's intent and his tasking. Another characteristic common to Marines is their expeditionary mind-set.... At a minimum, then, we expect Marines to manifest tactical competence, understanding of mission-type command and control, and a willingness to endure hazard and discomfort.... Patience, then, is a cardinal virtue.

The patience needs to be tempered with great energetic activity.... Operations will require discretion and care in the application of deadly force. Establishing a durable condition of order will require coordinated cooperative action with indigenous allies. For this reason, our model Marine will need to cultivate partnerships with local actors. *Trust* and *credibility* will be the key assets in building such partnerships. This set of requirements suggests a simple list of *ordinary* attributes of particular importance to our *ordinary superman*:

<b><i>ORDINARY MEASURES FOR SUCCESS IN ADVISING LOCAL PARTNERS</i></b>	
Be consistent, firm, and helpful.	To have a partner, be a partner.
Don't be duped. Trust but verify.	Play for the long run, because setbacks will be abundant.
Be relentlessly inquisitive about the social picture around you. Build a picture but don't trust your picture. Constantly question your own assumptions.	Show candor and demonstrate understanding when you address deficiencies, and when you relish successes, too.
Be a committed advocate for your partners.	Manage Expectations! Promise less and deliver more.
Be outwardly personable with local partners and with the population at large. Listen to what they say. Remember the specifics or take careful notes.	

This list is *both* unusual *and* also familiar. On the one hand it's unusual perhaps to promote such behavior in a combatant, but on the other hand this series of measures is good advice for the new guy in school, for the new arrival in the office, the new player on the team. It's the sort of advice that a father might tell a son.... This "both... and..." quality indicates the degree to which our ordinary superman should be both inventive and also grounded in fundamental skills, both ingenious and practical.

Presenter

Capt Scott Cuomo, USMC  
Small Wars and Counter-Insurgency Instructor, USMC Infantry Officer Course

Paper

"A Revolution in Training for 21<sup>st</sup>-Century Combat at the Infantry Officer Course"

*Abstract*

This paper, based on experience as a platoon commander and instructor at the Marine Corps' school for infantry officers, examines changes to the curriculum at that school in light of lessons learned in Afghanistan and Iraq. As opposed to a previous curriculum focusing overwhelmingly on conventional operations and war where civilians were incidental, the Infantry Officer Course over the past two years has devoted more curricular time to counterinsurgency, taking advantage of returning commanders at all levels, as instructors and curricular consultants.

More importantly, the method of instruction has changed. Rather than lecture, counterinsurgency and urban operations are taught experientially. A key component of this involves taking the entire class from Quantico, VA, out to 29 Palms Marine Corps Base to the Urban Warfare Training Center. Here, students learn through field exercises involving Iraqi role players and complex decision processes in an urban environment constantly moving along the kinetic spectrum.

The author discussed the advantages of such an approach, as it develops more practically as well as intellectually-attuned company grade officers who are more reflective and adaptive to conditions both encountered in structured learning, and as yet un-experienced prior to operations. The presenter recommended consideration of introduction of similar field-based learning experiences at the SNCO level, and appealed for a consistent and sustained funding line to be identified for such learning, as the support continues to be ad hoc. More broadly, the author called for re-thinking the method, setting, and desired outcomes of training for platoon commanders, recommending that such training be more educative in tenor.

Presenter

Dr Wilbur Scott, Assistant Professor, United States Air Force Academy, Department of Behavioral Sciences & Leadership

Paper

“The First-Deployment Experiences of Ft Carson’s Soldiers in Iraq”

*Abstract*

Recent work has emphasized the complexity of military operations in “sovereignty-challenged” regions, characterizing armed intervention in these areas as “savage but small,” “fourth-generation,” “full-spectrum,” or “long” wars. These terms refer to wars in which at least one of the sides is a military force not organized and controlled by a nation-state, and hence typically call for US military personnel to perform multiple roles and tasks, often ones for which they were neither socialized nor trained.

This paper described and addressed some key features of these complexities by analyzing oral histories collected from two units of Ft. Carson-based soldiers who served in Iraq during 2003-2004 and were on the verge of redeployment there in 2005. Special focus was on how all this was experienced and resolved by individual soldiers where boots met the ground. An earlier paper by the authors showed how the situation described above has created substantial gaps between expectations and realities for troops serving in Iraq since the first two months of the war. This presentation explored how these two units dealt with the shift in mission and reviewed mission-specific dilemma training.

Soldiers from Ft. Carson’s 3rd Armored Cavalry Regiment and the 3rd Brigade Combat Team of the 4th Infantry Division deployed to Iraq in April, 2003, expecting to fight the Iraqi army “tank on tank.” What they found instead was a form of urban guerilla warfare that called for them to play many roles, including many nonlethal ones distinctly different than those characteristic of armored scouts, tankers, and infantry dismounts. Their predicament, shared by other American units in Iraq after May of 2003, has become one of the hottest topics among commanders in the US Army and US Marine Corps and among defense intellectuals. The growing and adapting insurgency raised questions for unit commanders about the appropriate responses and tactics to use.

The answers to that depended upon a number of considerations, including the perception that there was in fact an insurgency; the form it may have taken in different areas and at different points in time; and the inclinations of unit commanders themselves, not the least of which was the tendency “to fight the fight” the units were configured and trained to do, even if it did not fit the demands of the irregular battlefield.

The paper then focused in particular on an important feature of irregular warfare: since the enemy is not the military of a sovereign state, who, in the soldiers’ view, is the enemy in Iraq? Did their perceptions of who the enemy is change during the course of deployment? What is their view of the Iraqi people, and what was their level of involvement in, and attitudes about, nonlethal roles associated with full-spectrum warfare?

Through this analysis of oral histories, the authors reviewed a version of dilemma training that may be used to anticipate and acclimate soldiers' mind-sets to the ambiguities of the irregular battlefield. Dilemma training consists of confronting a "real-life" scenario by identifying and analyzing the lethal (military, security) and nonlethal (cultural, infrastructure, humanitarian) issues it poses.

*Excerpt from this Paper*

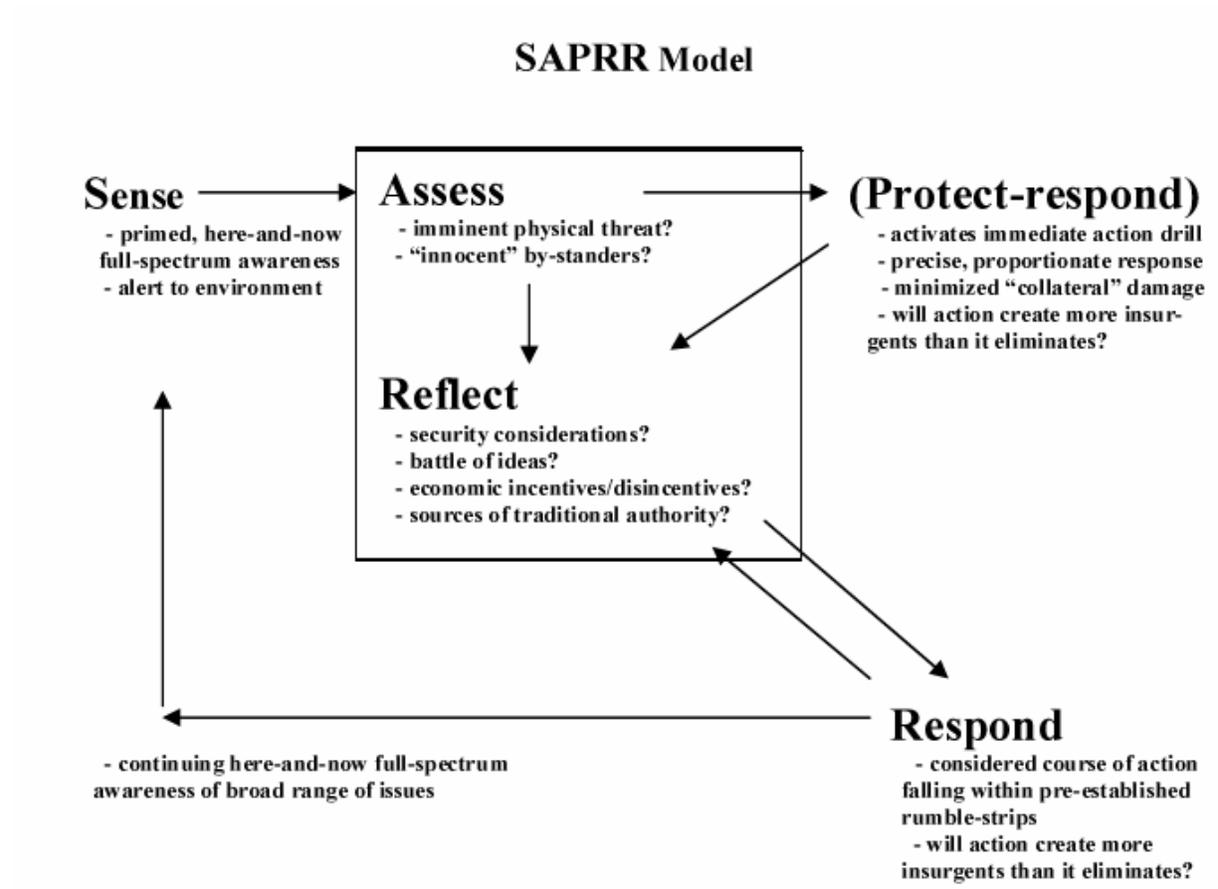
On the basis of oral history material, we devise three scenarios that commanders might use in this context, presenting a decision-making process adapted to hybrid operating environments. We propose the **SAPRR Model—Sense, Assess, (Protect), Reflect, Respond**—as a template for carrying out the combination of kinetic and non-kinetic tactical actions associated with 4<sup>th</sup> Generation warfare. We draw our inspiration for the model from John Boyd's OODA Loop and see our model as an extension of the Loop.

The SAPRR Model is rooted in the idea that, in Iraq, insurgents try to get US forces to decide and to act too soon, and, if possible, disproportionately - in other words, swiftly, thoughtlessly, and coercively outside their rumble strips. How does the SAPRR Model weigh against this? For starters, it begins with a specialized mindset, a primed here-and-now, full-spectrum awareness, that allows a scanning of the immediate battlefield in an alert and focused way (**Sense**). A good bit of this mindset must be established through training and rehearsals well in advance. However, since the model contains a feedback loop, this mindset also should be recalibrated with each iteration of the cycle.

The **Assessment** phase calls for detection in the Sensed information of imminent threats to the physical well-being of the troops and a simultaneous awareness of "innocent" bystanders. The latter elicits concerns and operational policy directed at force protection compatible with the dictum, "don't do the enemy's work." An assessment that there is an imminent threat – the explosion of a roadside bomb, small arms fire, etc. – activates an appropriate, preplanned immediate action drill. A key issue in this **Assess-Protect** sequence is the balancing of sound force-protection principles with a precise, proportionate response that minimizes what usually is termed "collateral" damage. A question running through this, "Will the action create more insurgents than it eliminates?"

Once order is restored, or if there is no imminent threat to physical security, the next phase is **Reflect**. Main tenets here should revolve around four issues: providing basic security against harm, winning the battle of ideas, extending economic incentives while reducing disincentives, and formulating appeals to traditional authority. These considerations address the basic problem: in a counterinsurgency setting, the bulk of the population typically is caught between a central government and a challenging group of insurgents. The basic trick in winning this battle is to "win the hearts and minds." This is accomplished by giving the populace more reasons to side with the central government than with the insurgents. This is what our last phase, **Respond**, and the ensuing feedback loops are designed to do. Here, too, the overriding question is, "Will the action create more insurgents than it eliminates?"

Because the SAPRR Model requires soldiers to consider a wide range of information and make highly reasoned decisions, especially at the **Assess** and **Reflect** stages, their skill at doing so hinges on specific training. Dilemma-based scenarios assist in developing these skills. There are myriad ways to teach concepts, information, and skills. However, there are some important considerations for bolstering the effectiveness of both the use of the SAPRR Model and its integration with dilemma-based training scenarios.



## **Panel L: Emerging Perspectives in Professional Military Education**

### Coordinator

Maj Gen Daniel Gosselin, CAN, Commander, Canadian Defence Academy, Kingston

### Discussant

Col William Monfries, AUS, Colonel of Education and Training Systems Branch and Head, Royal Australian Army Educational Corps

### Presenter

Col William Monfries, AUS, Colonel of Education and Training Systems Branch and Head, Royal Australian Army Educational Corps

### Paper

“Initial Officer Training in the Australian Army”

### *Abstract*

There is an urgent need to modify traditional war mindsets by developing soldiers and officers to deal effectively with the complex, politically dominated, multidimensional, multi-organisational, multinational and multicultural contemporary operating environment. Transitioning from an industrial age army to an information age army sits uneasily in a warrior mindset attuned to the delivery of kinetic effects. Developing the right mix of soldier and officer skills is therefore a key challenge. It will require a balance between training (the acquisition of skills to help soldiers to achieve certainty) and education (developing thinking skills and promoting understanding to help soldiers to deal with uncertainty).

Core training and education content therefore must be amended to equip soldiers and officers for the full spectrum of 21st century operations.

- Training and education methodologies must evolve so that enhanced cognitive ability adds to “traditional” soldier skills.
- Adaptable individuals need to be supported by systemic change that guarantees organisational learning and adaptability, thus setting the conditions for individual and collective success on operations.
- As the enemy of adaptability, prevailing organisational cultures need to be critically examined and modified. This can only come from the top.
- Changes to organisational structure are required to underpin mission success, and these must be implemented in barracks, in training and on operations.

Some difficult questions need to be asked during this process, about the adaptable skill sets and dispositions now required of the modern soldier in addition to traditional warfighter ethos and practice.

- Trainers must understand how training and education come together as learning, and how individual learning translates into an organisational effect.
- The army itself must ask whether it is a learning organisation and what it needs to do to become one.

- Organisational cultures, systems and processes must be fearlessly challenged to identify whether everything possible is being done to produce mentally agile soldiers who can deal effectively with the complexities and ambiguities of the contemporary operating environment.

This paper considered some possible answers to these questions by examining how core training and education content might be amended to equip soldiers and officers for the full spectrum of 21st century operations. It proposed some accompanying training and education methodologies that are more likely to develop cognitive ability than current training practice. It suggested that adaptable individuals need to be supported by systemic change that guarantees organisational learning and adaptability. It examined the accompanying need to renew organisational culture (the enemy of adaptability) and asked what changes to organisational structure are required to underpin mission success.

#### Presenter

Col Randall Wakelam, CAN, Director of Curriculum – Canadian Forces College

#### Paper

“Preparing for Any War: the Search for Effective Professional Education”

#### *Abstract*

This paper looked at long term trends in senior officer Professional Military Education in Canada. It argued that regardless of the type of intensity of conflict, broad education which focuses on developing the intellectual capacity to deal with complex ambiguous situation is the nexus of effective performance.

Starting with the impact of the outbreak of the Second World War on staff education the paper assayed what educational concepts were advanced during the Cold War and post-Cold War periods. The transition from the Cold War to the Long War paradigm that currently exists shows the fairly clear dichotomy between the PME needed to deal with conventional operations and the shift in content and delivery necessitated by current operational and strategic challenges. Specifically, the paper reviews three major reforms to PME in Canada.

1. The complete reconceptualization of the profession of arms and its education needs in the late 1960s when the Canadian navy, army and air force were unified by act of Parliament.
2. The professional introspection and reforms to education which occurred as the result of the death of a detainee in Somalia and subsequent ethical shortcomings of senior Canadian Forces leadership in the mid 1990s.
3. The current demands of large scale operations in Afghanistan since 2002.

While only the last of these falls into the definition of the Long War each case typifies the institutional challenges and paradigm shifts which current operations represent. The first two reforms led to the introduction of, or proposals for, new PME ‘products’ to address gaps in professional education. They also led to considerable debate about the

need for undergraduate and graduate degrees for officers and for the associated conduct of PME along the lines of graduate level pedagogy. The current reformation is still underway and may or may not see significant redefinition of personal and professional competencies and the PME needed to general them.

From this basis the paper then addressed contemporary practical questions and challenges of conducting graduate liberal arts education in a military institution. These involve

- The tension between the policy decisions made at the highest levels of the profession and the day to day application of those policies.
- The practical application of the appropriate and necessary learning methodologies
- The frictions created as the Canadian Forces College continues to transform itself from a classic staff college to a school of higher learning.

Evidence included published and unpublished sources, the former including both discourse on these issues as well as official documents and ‘doctrinal’ manuals for the planning and conduct of PME programmes and courses. In addition the paper drew upon the experiences of the author and other military educators who work in Canadian PME.

#### Presenter

Michael Hoffman, Assistant Professor, US Army Command & General Staff College

#### Paper

“Teaching Legal and Professional Standards for the Long War”

#### *Abstract*

We cannot teach clear legal and interagency professional standards for the long war. This is because such standards have not yet been formulated. Until then, and despite such obstacles, we need to formulate a pedagogical approach that provides our civil and military leaders with useful guidance. They will need a curriculum that helps them acquire knowledge and skills on emerging but uncertain legal and professional standards that they need to apply in joint and interagency operations for the long war.

International law does not account for warfighting involving private international insurgent organizations. Similarly, international law is vague about professional standards for humanitarian assistance and stability operations. However, moves to adopt such standards are emerging. Some members of the community of nongovernmental organizations (NGOs) actively promote their own vision for such standards. These standards may be tentative and open to debate but they will inevitably shape public and media expectations when we conduct interagency operations during the long war. Reaching agreement on such standards will be difficult. NGOs, international governmental organizations, and state actors bring different views of what these should be.

Teaching legal and professional standards for the long war takes educators right up to the frontier of international law. The warfighting rules that apply during irregular warfare are,

in many cases, ambiguous and susceptible to heated debate. Non-military standards for professional conduct and measures of effectiveness in humanitarian and stability operations are now gradually emerging within the framework of international law. These issues will impact joint and interagency missions.

Joint professional military education standards should be formulated setting out issues, areas of uncertainty, and doctrine (or elements of prospective doctrine) that will equip military and civilian leadership to devise practical answers while the debate continues. To wait for these issues to move toward resolution would be a mistake. Interagency leaders need to understand what rules and standards exist, and when and where they need to devise their own answers in the absence of clear guidelines. Development of additional formalized standards will take a long time. Humane and pragmatic state practice, to include curriculum developed within the interagency education system, will itself establish a foundation for future codification of legal and professional standards that are favorable for democratic societies fighting the long war.

*Excerpts from this Paper*

Future pedagogy should educate leaders to frame legal and professional standards in a wider political and operational context. Long War legal standards will likely emerge not from new treaties but from adoption by analogy of existing, treaty-based rules designed for interstate and internal warfare along with customary rules of war. Many long war challenges won't fall within the familiar framework for interstate and internal armed conflict.

While lawyers play a growing role in the operational process, their clients will be well served by broader familiarization with law of war and human rights principles that might have utility in the Long War context. We need curriculum that prepares lawyers and clients alike for collaborative efforts that will shape future rules. That curriculum will be as important as classroom analysis of existing rules.

Professional standards for humanitarian response and institution building come as close to military doctrine as many civilian organizations get. Military and interagency leaders need to become familiar with the kinds of experience and insight found in professional and nongovernmental organizations-and represented in those standards. Drawing on this reservoir of experience will save a great deal in trial and error and likely save lives.

A case study-focused curriculum offers students and educators the best way forward. As Long War legal and professional standards are still in formation an analytical, problem solving approach is more useful than one grounded in lectures on rules and professional standards. Curriculum should be built around case studies that explore the application, utility, and limitations of international law and professional standards in Long War settings. That curriculum should also prepare students to identify, adapt, and develop Long War doctrine that draws on existing but sometimes less than perfectly suited legal and professional standards.

## **Panel M: Historical Perspectives of COIN**

### Coordinator

Professor Ed O'Dowd, Marine Corps University

### Discussant

LtCol Nick Floyd, AUS, Education and Training Systems Branch, Australian Army

### Presenter

Dr Phyllis Culham, Professor of History, United States Naval Academy

### Paper

“Roman Counter-Insurgency”

### *Abstract*

Roman legions of the Imperial era are justly famous as models of professionalization, articulation, and cohesion. Much less attention has been paid to their successes and difficulties in adapting to irregular warfare in various theaters. In the fall of 2006, the researcher developed a new course in Roman Counterinsurgency, taught as a seminar, and requiring a twenty page paper based on primary sources. In the spring of 2007, the researcher integrated a new theme, i.e., counter-insurgency and other irregular warfare, into a long-standing, popular survey course on Rome in which students could opt to write ten page papers incorporating ancient sources. Students were enthusiastic and oversubscribed both courses, although resulting papers were not all fully successful.

Use of any historical material for any comparative purpose, including the intellectual testing of models and theorems, requires careful definition of such basic terms as terrorism, insurgency, and irregular. Even enthusiastic students attempted to work from culture-bound assumptions, e.g., that irregular forces cannot have stable or elaborate leadership mechanisms and that their aspirations and models are limited to severely asymmetrical modes. Indeed, among the most difficult feats for undergraduates were dispassionately assessing the quality of irregular and insurgent leadership and seeing beyond the labels attached to such groups by elite contemporaries, e.g., “bandits.” Such problems especially emerged in the consideration of one of the three examples of Roman counter-insurgency studied in the seminar, that discussed in the following paragraph. After talking to colleagues, the researcher hypothesizes that ancient examples of counterinsurgency provide good occasions for introducing students to the terminology and methodological problems, since they bring even more pre-conceptions to modern case studies.

Some students had difficulty, as the researcher had anticipated, separating themselves from popular stereotypes of Jews and Romans in the First Jewish war of 69-71 CE, the seminar's final case study and most popular choice from which to develop a paper. Some students were able to view the conflict dispassionately as a confusing situation combining features of civil war, terrorism, criminality, and class warfare, further confused by ethnic

issues. Nonetheless, some of them almost sank beneath such complications in conceptualization. For instance, one paper on youth and urban factions during the revolt was too ambitious for the author's own good.

The best paper in the seminar, however, examined successes and failures among Roman uses of non-Roman forces in the theater. Another paper in the Roman survey course examined the situations in which Roman regulars used terror as an option which would not now be available to any modern state which did not want to be outlawed by the international community. That paper supplies a data base on successes and limitations of terrorist operations by regular units which one hopes no one would want to use as guidance in the future, but it does offer a ground on which one can view these operations with relative dispassion.

In the Roman survey course, the researcher urged students who wished to work on intricate problems of counterinsurgency to consider long-standing issues in Illyria/Dalmatia/Pannonia/Moesia encountered by Tiberius, first as a consular legate in the field under his predecessor Augustus and later by his legates after he had succeeded Augustus as emperor. Students writing on this topic realized that they had to take a Long War perspective. The survey course format meant that the students knew how the Romans were drawn into fighting "pirates" on the coast of what is now Croatia as early as 229 BCE, extending through repeated expeditions from 157 BCE through Caesar's attempts to conceptualize the problem, to the grinding operations taking the war over the Dinaric Alps into the Danube basin (through what is now Bosnia) in Augustus' and then Tiberius' attempts in the late 1<sup>st</sup> century BCE and early 1<sup>st</sup> century CE to achieve regional stabilization in the face of resistance from their own legions who wanted out of that theater.

The researcher would not initially have labeled any of the students tackling this topic brilliant or talented, yet they did excellent analysis, isolating such issues as Roman leadership's definition of goals, how a war may be less neatly contained than it initially looks, how "control" and "stability" are slippery issues, and how efforts by an outside power claiming to represent order and civilization may have to write off earlier combatant generations to start over influencing the youth of a region.

In summary, instructors must model rigor and consistency of definition in order to overcome pop-culture and journalism-derived understandings of irregular and asymmetrical warfare among undergraduates. Once past that hurdle, undergraduates tackle such problems enthusiastically and can produce excellent work on counterinsurgency and Long War as fought by Roman legions and allied forces. In fact, the Roman legion is an excellent tool for inducing undergraduates to examine definitions, theories, and techniques with rigor and relative dispassion.

Presenter

Dr Ian Roxborough, Institute of Advanced Study, Princeton, New Jersey

Paper

“Inside the Adversary’s Mind: Pedagogy, Empathy, and Insurgency”

*Abstract*

Good pedagogy relies on concrete examples to illustrate and develop general points. The teaching of irregular warfare currently relies on a few, familiar examples of counterinsurgency which are not the best. Teaching irregular warfare must focus on understanding the enemy. Empathy facilitates understanding; students who cannot empathize with the subject learn only mechanical formulae. Current examples—Vietnam, Algeria, Malaya—involve the US, Britain or France in the role of counterinsurgent. The insurgents are a shadowy and poorly-understood “other.” They are seen as alien fanatics.

We need to use a different set of examples when teaching complex irregular warfare. We should move away from examples where the Americans are the counterinsurgent “good guys” to cases where students can identify with—or at least respect—the insurgents. Students must be able to get inside the adversary’s mind. There are two obvious examples: the American Revolution and the struggle for Irish independence (1916-23.) Both cases have produced good histories, and the Irish case in particular has some magnificent detailed regional studies.

Both cases are useful examples of counterinsurgency for all the usual reasons: the wars are complex; they involve conventional operations as well as guerrilla warfare; they are part of larger protracted conflicts, often involving great power rivalries; they involve the creation of a counter-state; they demonstrate the difficulties the COIN power has in understanding the dynamics of the conflict; they demonstrate the divisions in the COIN power over appropriate strategy, etc.

More importantly, Americans can readily identify with the insurgents in these examples; they do not have to overcome cultural barriers to grasp what motivates insurgents and why they are such difficult enemies. This then makes it possible for the student to think effectively about how to develop a counterinsurgency strategy by moving the student away from simplistic “good guy, bad guy” modes of thought. Finally, this pedagogical method facilitates self-analysis in terms of the concepts and assumptions students bring to the study of counterinsurgency.

Presenter

Dr Robert Chisholm

Assistant Professor, History & Political Science, Columbia Basin College

Paper

“Guerre Revolutionnaire to National Security Doctrine”

*Abstract*

This paper examined a challenge posed by the task of teaching irregular warfare to conventional military forces by highlighting the experience of two well-established and professionalized militaries engaged in doctrinal development and changes to their military education systems as they faced operational challenges. The changes resulted in the erosion of the military’s political neutrality because of the nature of that doctrine, thus offering lessons regarding the relationship between military education for “irregular” functions, and the military’s understandings of professionalism and apoliticism.

In discussing “Pedagogy for the Long War,” institutions must consider the impact of “teaching irregular warfare” on the professionalism of the military that studies it. One of the bedrock beliefs about the modern military institution has been that professionalism is a product of military education and that professionalism encourages a military that is essentially apolitical and, therefore, more effective and more compatible with civilian control. This professionalism is the key to civilian control over the military in democracies. The ideal of professionalism as conduit to de-politicization has been subject to a great deal of criticism, but the argument that apolitical professionalism creates a military capable of functioning with minimal supervision by civilian authority remains strong.

Even as such arguments were being elaborated in scholarly literature in the early post-WWII era, one of the world’s most professional militaries (judging by the extent of the education and training system for its officer corps) was in the process of transforming itself through its military educational system to fight insurgents, and would shortly stage a coup that brought down the Fourth Republic in France in the name of meeting this new challenge. Following the French lead, the most professional military in Latin America would convince itself of the need to overthrow the elected government of Brazil and initiate the first attempt at long-term, institutional, military rule in Brazil’s history.

The political interventions of the French and Brazilian armies cannot be explained by common problems of social and economic development. Nor can the coups be explained by reference to cultural traditions or common military patterns of political activity. The internal military and political experiences of the two countries were also quite different in the 19<sup>th</sup> and 20<sup>th</sup> centuries: The French Army was characterized by “political abstention” rather than activism after overthrowing the Second Republic in 1851; while the Brazilian military claimed for itself and frequently exercised a constitutional right to intervene temporarily in politics as the heir of the “moderating power” exercised by the Emperor who was overthrown by military coup in 1891.

The key feature shared in both cases is, in fact, the very institutions of professionalism that are taken to guarantee the state against political activism by the military. The instruments of professionalization—military education and doctrine—served to undermine the apolitical nature of professionalism that was believed to be the best guarantee of civilian control of the military.

Substantial portions of the officer corps in both France and Brazil understood themselves faced with military challenges that were not those of conventional warfare and responded with a doctrine based on the ideological challenge and the political demands of the perceived threat. The related doctrines of irregular warfare (*Guerre Révolutionnaire* in France and *Doutrina da Segurança Nacional* in a more all-embracing form in Brazil) that were developed spread through both militaries and justified the overthrow of civilian regimes judged inadequate to the new nature of war.

This was neither a necessary outcome nor a simple betrayal of the ideal of professionalism, but a development that was connected to the nature of the new doctrine, which was inherently ideological and political. The key point is the degree to which military doctrine was allowed to become the determinant of political objectives rather than a guide to means.

### **Panel Working Groups** **Wednesday 1:30-3:30 pm**

Subsequent to all panel presentations and question/answer sessions, panel coordinators, discussants, presenters, and select panel attendees met to consider the papers, identify emergent questions and problems, and develop concrete recommendations of use to the joint and international military pedagogical community.

After two hours, the working groups' recommendations were collated and synthesized by rapporteurs, who presented them on the final day of the conference to the conference plenum. These rapporteurs included Barak Salmoni, Deputy Director of the Marine Corps Center for Advanced Operational Culture Learning; Col Dan Kelly, director of Center for Irregular Warfare; Kerry Fosher, Marine Corps Intelligence Activity Command Social Scientist; and LtCol Daryl Campbell, Australian liaison officer to Quantico.

The final plenum was chaired by LTG David Baron (USA, ret), Director of the Near East/South Asia Center at National Defense University. Other distinguished attendees included LtGen James F. Amos, Deputy Commandant for Combat Development and Integration; LtGen Paul K Van Riper (USMC, ret); MajGen Donald Gardner, President of Marine Corps University; MajGen Daniel Gosselin (CAN), Commander, Canadian Defence Academy; BGen David Fraser, Commandant, Canadian Forces College; in addition to Quantico school directors and foreign Liaison Officers. Working Group outbriefs can be found in the section "Panel Outbriefs" below.

**Thursday 1 November 2007**

**Final Day**

**Panelists' Breakfast:**

**7:30-8:30 am**

In order to crystallize the insights of the panel participants and provide an education-intensive focus, the Conference Steering Committee invited **Bill Monfries, Colonel of Education and Training Systems Branch and Head, Royal Australian Army Educational Corps** to deliver a key-note address at a breakfast for panelists and distinguished attendees. In his comments, Col Monfries amplified ideas from his panel presentation, drawing also on the most recent conclusions of US, UK, Australian, and European applied scholarship on the topic of military education for evolving operational challenges.

*Excerpts from Col Monfries' Comments*

To pin down their training and education challenge, Armies must distil what the contemporary operating environment means for the soldier. British Army doctrine describes the contemporary operational environment and the training and education challenge thus:

“In today’s turbulent and uncertain world... the Army must be prepared to meet the challenges of *any type of operation, in a range of physical environments, and against all kinds of threats, simultaneously* [my italics]... The adaptive foundation of training for high intensity conflict remains valid; however, it should be complemented by training that prepares our soldiers to cope with a variety of tactical situations across the spectrum of conflict, occurring simultaneously within the same geographic area.”

This British definition defies armies’ doctrinal liking for neat, linear approaches. It challenges the military assumption that an army mostly wages war and at other times it may, perhaps reluctantly, conduct “operations other than (conventional) war.” It forces the realisation that contemporary operations are not a matter of “conventional” versus “unconventional”, but of configuring and deploying a military force that has the right utility for the job. It highlights the need to develop a core human capability that has utility across the range of likely operations.

Armies must still train their soldiers to respond instinctively to tactical threats and to be able to replicate the desired responses with a high degree of accuracy, individually and in teams. However, when nascent threats are yet to be revealed, experienced and recorded, the appropriate response cannot be perfected and trained.... This means that learning content needs to be... expanded. It also means that individuals and units must be cognitively ready, as well as operationally ready.

The key is to identify and be willing to deliver the right mix of training and education. Training is a learning process focused on technical and procedural abilities. It ensures that personnel can apply standard solutions to predictable circumstances, that is, *deal with a familiar problem in a familiar context*. On the other hand, education transfers theoretical knowledge to the learner and develops cognitive skills such as critical thinking, problem-solving and communication.

In an Army context, education should provide individuals with the philosophies, attitudes and intellectual theories that underpin both the military ethos and an individual and collective ability to thrive in an environment of uncertainty and complexity. Through education, individuals can find reasoned and viable solutions to complex and unanticipated situations; that is, they can *deal with complex problems in unfamiliar contexts*.

Cognitive readiness must also be addressed. “Cognitive readiness refers to the potential of individuals and units to perform well in combat or other military operations, based on an assessment of their mental preparation.

- The factors that determine cognitive readiness are associated with not only the traditional cognitive (thinking) factors, but also personality and disposition, motivation and emotion, and beliefs and attitudes.
- Cognitive readiness is a significant concept associated with critical thinking and problem solving for soldiers who must adapt quickly to rapidly emerging, unforeseen challenges.
- In the ordinary course of training, individuals and units [must] be prepared for tasks that are anticipated for mission success. But the readiness of individuals and units to acquire the additional capabilities required to meet the unexpected, unforeseen challenges associated with the asymmetric battle space [is an increasingly vital] element of their preparation.” Cognitive readiness is a measure of that preparation.

The learning organisation and the nature of the challenge: Learning, adaptive individuals will be compromised in their missions if the organisation itself is either incapable of learning or is too slow to do so. Nagl’s thesis is that *organisational culture is the key to the ability to learn from unanticipated conditions*. Given that no operational conditions can be known perfectly before deployment or commitment to action, his thesis seems impregnable. So the education and training challenges for 21st century security/land forces must be addressed in organisational as well as individual terms.

From soldier and officer induction training onwards, core training and education content should develop an understanding that:

- Contemporary conflict has origins and nature that transcend the traditional practice of industrial war as “battle in a field between men and machinery.”
- Kinetic effects are only one part of the utility of 21st century force and only one of many tools that soldiers must learn to use.

- The people are the Centre of Gravity, for government/coalition *and* enemy.
- All lines of operation (conventional effects, counterinsurgency, civil affairs, negotiation and mediation, information, humanitarian, psychological and stability operations) are an intrinsic part of the application of force, not sideshows that follow the conventional fight.
- There are political factors at the heart of every in-country and regional deployment, every coalition operation and every UN operation.
- Knowing the operational—and therefore political—context is fundamental to success at all levels of command.
- Leadership is about flexibility, open-mindedness and the willingness to find new solutions to unanticipated problems.

Learning content should evolve throughout the promotion continuums and should always be presented and practised in a mission command context. It should include training and education in cultural and media awareness, ethics, negotiation and mediation. At more senior levels it should include education and preparation of staff to influence the government during the formulation of a military response and to constantly seek to understand the political imperatives, while reminding their government that kinetic military effect is not the entire means to a political end.

This poses challenges for armies. For example, the notion of “additional military ethics training” does not intuitively harmonise with “core warrior values.” However, recent work suggests that ethics, future career opportunities, environments and social responsibility are more important drivers of commitment for today’s young leaders.

An army’s training and education methodology therefore needs to transmit this additional content while focusing more on the development of cognitive skills. In the Australian Army, individual learning will be enabled by a new training paradigm, which encompasses six principles:

**1. Focus on the learner.** Producing skilled soldiers who are cognitively ready for the modern battlefield requires Army to think more deeply about the mental activity of learning and how best to foster it. Armies commonly talk about *training* people, as though the trainees are being delivered something and have little choice in the matter. However, training is a series of *learning events* staged by an instructor, a teacher or a coach, where the *learner* does most of the work. Some characteristics of learning are:

- The key to learning is motivation.
- Learning happens in the learner’s mind, not the teacher’s.
- Effective learning results in a predictable, permanent, and desirable change in behaviour.
- Learning is for the learner’s and the organisation’s benefit, not the instructor’s.
- Different people learn in different ways; some by doing, some by seeing, some by discussing and arguing, and some by finding out independently or in groups.

**2. Re-balance training and education.**

**3. Foster the Nine core Behaviors.** The Chief of the Australian Army has identified nine aspirational Core Behaviours to describe the sort of soldier required to deal with these tasks. Within his or her trade and specialisation, every soldier should be developed to:

- be an expert in close combat
- be a leader
- be physically tough
- be mentally prepared
- be committed to lifelong learning
- be courageous
- take the initiative
- work for the team
- be compassionate

**4. Develop the instructor.** To support this learning environment, Army's educators and trainers will need to adopt new teaching practices that have trainees assess, conclude and evaluate as well as they can label, memorise and record. Memo to instructors: young generations – including combat experienced soldiers and officers – regard this as their right. This means a challenging series of moves:

- from the instructor-centred approach (less “sage on the stage”) towards an approach where soldiers are viewed as adults who can be motivated to learn;
- from the passive transmission of knowledge towards the active and meaningful construction of knowledge (more “guide on the side”);
- from a focus on learning technical skills towards a focus on the whole job, the whole person and learning to learn;
- from an emphasis on formal learning towards a productive integration of informal and formal learning;
- from individualised notions of learning towards learning partnerships and communities of practice, whereby groups learn together;
- from an emphasis on verbal and directed learning towards hands-on learning by doing, case-studies, lessons learnt, problem-based learning, experiential and self-directed learning; and
- from assessment that merely measures learning and controls learners towards assessment that aids learning and empowers learners.

**5. Exploit technology.** Relevant technology must be exploited where appropriate, both as an information medium or pipeline and as a partial learning solution establishing a better progression from individual training, through collective training, to operational preparedness.

**6. Improve the training progression.** Armies need a better understanding and practice of the progression from raw recruit to a member of a combat-ready team. Training and combat organisations need to agree on the standards expected of the soldier who emerges from the individual, common and specialist learning experience. They also need to

understand how to manage and assess the subsequent progression through common collective and, finally, mission-specific collective learning.

It is essential that beyond individuals, militaries themselves become learning organizations. Successful learning organisations are able to *adapt* to changes in their environments in a timely manner. Learning for... these organisations occurs beyond the traditional individual continuum... Appropriate organisational tools (eg, structures, practices, records, systems and operating procedures) ensure that learning... become[s] the property of the organisation, thereby facilitating continual growth. The Australian Army is developing a conceptual approach to becoming a learning organisation, comprising:

- An executive management dimension that links concepts and capability development to suitable learning outcomes. It comprises planning, policy, procedures, enterprise systems, enabling support, organisation, and resources.
- A knowledge management dimension that creates, identifies, accumulates and applies knowledge and intellectual capital across the organisation. Knowledge flow is fostered, empowering the organisation to learn.
- A learning and assessment dimension that ensures training and education are everyday occurrences. Delivery will be timely, entirely relevant and convenient, resulting in individuals and an organisation that know both what to think and how to think.
- A synthetic dimension that ties all this together and includes executive management and enterprise systems, information environments, knowledge storage and retrieval, computer-based learning and simulation.

In conclusion, to confront, understand and overcome the training and education challenges for land forces in the 21st century, armies must modify their comfortable focus on configuring and training for the industrial war of yesteryear.

Technology alone cannot provide the force with the utility to deliver full spectrum effects in an environment of complexity, ambiguity and uncertainty. People are the only long term competitive advantage and learning is the only way to fully develop that advantage. This means amending core training and education content to better prepare soldiers and leaders for the full spectrum of 21st century operations.

Training and education methodologies must also be adjusted so that enhanced cognitive abilities add to, and build on, traditional soldier skills. Prevailing organisational cultures need to be critically examined and modified to ensure the development of a genuine learning culture so that smart soldiers are supported by systemic change that guarantees organisational learning and lays the foundations for individual and collective success on operations. 21st Century land forces must concentrate on utility rather than on convention. They must recognise that, ultimately, the answer to their training and education challenges lies in developing smart soldiers who can manage both conventional operations and everything else, simultaneously.

The impetus for this change can only come from the top.

**Panel Outbriefs**  
**8:45 am – 12:00 pm**

**Panel A: Definitions and Doctrine**

**Recommendations to Plenum:**

- 1) The joint (and inter-agency) community requires a common, agreed-to, shared lexicon,
  - developed through consensus
  - meaningful to the fundamental components of the tasks at hand
  - but not a lowest common denominator list of terms with no principled meaning
- 2) Problems need to be framed better and more humbly
  - Be explicit about premises
  - Continually problematize these premises: accept them as hypotheses, not givens, but rather hypotheses that need to change as do realities.
  - Examples: What is “the long war?” Who is the enemy? How long will the war last?
- 3) It is important to bear in mind what doctrine is, and what it is not.
  - Doctrine is not TTPs, or SOPs, nor is it intended to be specific to a particular time, place or mission, or billet.
  - Discussion of principles that proceeds to far down the prescriptive path WRT specific AORs is not doctrine and does not equip for the Wong War
- 4) Doctrine according to the joint definition:
  - *Fundamental principles* by which the military forces or elements thereof guide their actions in support of national objectives.
  - It is authoritative but requires *judgment in application*.
- 5) Because of the lack of focus on principles, and a faulty approach to problematizing and questioning our premises upon which we seek to solve problems, we keep changing terms, because we can’t get our arms around the problem
  - Definitions are updated “every few months”—there must be some level of stability in a definition
  - Buzz words imply a certain level of abstraction, providing solace when we don’t really understand the underlying problem
  - Buzz words also have greater sex-appeal, allowing others to agree when they really disagree: semantic palliatives replace conceptual grasp and principled debate

6) Doctrine writing has become an industry in itself—there may be too much “art, not enough matter.”

- Doctrine needs to not be service or branch advocacy, and it needs to be written by the experienced, still serving practitioners, according to realistic timelines.
- Changes to doctrine should be preceded by deliberate discussions, engaging the ideas of informed practitioners. Review processes need to improve.
- We always need to be aware of the temptation to be pretentious, or to “over intellectualize” the environment. Floridness, or over-eloquence, might inspire excitement, but will lack insight required to assess complex problems.

## **Panel B: Counter-Insurgency**

### **Problems and Questions Identified**

#### Strategic Level

Lack of understanding of

- Whole of Government Approach (WOG).
- How services operate and Inter-Agencies operate
- Relationship between IW and COIN.
- Focus of Long War (not all in Combat Zones)

#### Operational Level

- Poor or lack of prior campaign-level planning
- No need for specific IW or COIN campaign planning process.
- Inter-agencies need to be part of the process, but do not possess harmonized planning processes or mental picture of meaning/purpose of planning.

#### Tactical Level

- What are we doing now for OIF/OEF that will be relevant in the Long War, and additional training is required?
- What do we want a Marine/Soldier to look like in the 21st Century?
- What are core tasks of COIN, and how do we define and measure proficiency?
- Are we coordinated and synchronized in officer and enlisted training?
- Are we taking away commander’s “white space”?
- Who is responsible for training and educational advances between schools and operating forces?

### **Recommendations for Plenum**

#### Strategic Level

1) Establish Center of Excellence that focuses squarely on the educational and training aspects of COIN, in larger rubric of IW. This COE should be adequately staffed with subject matter experts to provide input into curriculum for the theory and practice of COIN, at different levels of rank, experience.

2) More space at military educational institutions should be provided to inter-agency personnel. Other agencies should free their people to attend military institutions, while the schools themselves should see these inter-agency students and faculty as core teaching and learning resources.

3) Learn pro-actively from multi-national partners to see how they are engaged in the process, understanding that approaches working in specific national, organizational, and educational cultures, and arrived at in order to deal with specific circumstances, cannot be borrowed without consideration for national and organization peculiarities.

#### Operational Level

4) Create a mutually-assistive process to assist in development of joint *and* inter-agency planning doctrine. This doctrine must be aligned with existing military doctrines and processes, yet harmonized with inter-agency methods and organizational cultures.

5) Paramount in the doctrine and process must be the nature of challenges requiring common joint/inter-agency planning. Inter-agency engagement must have as a central purpose mutual education and relationship-building.

6) When necessary, assist Inter-Agencies in developing planners, and where helpful, learn from inter-agency.

7) Integrate inter-agency planning cells into exercises and wargames from inception, from both the educational and mission rehearsal perspectives.

#### Tactical Level

8) Study, in a collaborative, ongoing fashion what we want Marines/soldiers, etc., to “look” like for the Long War, and synchronize across schools and rank-levels.

9) Provide implementation plans, as well as subject matter experts and funding, for programs identified as meeting future needs

10) Examine civilian education institutions for face-to-face participation, as well as through virtual training.

11) Preserve commander’s time to train, with better assessments and measures of risk of time lost (or risk of not providing learning opportunities) vs. the gain of inserting learning into the unit’s schedule.

## **Panel C: PME for IW: Learning and Networking**

### **Recommendations to Plenum:**

- 1) Experiences with courses such as those focusing on broad, non-region specific, enduring phenomena can be used to develop PME for IW.
  - An example is courses on terrorism as phenomenon—not terrorism in a place.
- 2) Course development needs to be comprehensive. A holistic approach is essential, and barriers to learning must be avoided. These barriers include
  - Viewing terrorism—or IW—as a “detour from the real war”
  - Tendency to focus only on Islamist terrorism or the ideological movements we recognize (religious)
  - Not treating terrorism, or societal drivers of IW footsoldiers, holistically
  - Focusing only on Now: Iraq & Afghanistan
- 3) Networking is a critical component to student learning.
  - Diverse student body promotes learning
  - Greater international student component builds US skills for combined/coalition operations, and creates human networks
  - Greater US interagency participation benefits all in creating a shared mental map
- 4) How to develop these courses?
  - Commit your own institutional money early, take the initiative, and do not be reactive
  - Focus on education, not training
  - Curriculum must be balanced, coherent, & flexible
  - Don’t rely on guest speakers to deliver key learning outcomes—do as much as you can with organic assets
- 5) Faculty and faculty development
  - Know your people: assess, hire, and mentor for specific capabilities
  - Avoid cloning, but develop some overlap capability
  - There is no substitute for specialization and expertise
  - Build capacity—and recognize this will take time
  - Operational experience is important, but broader perspective is more so
  - A firm disciplinary, research, and pedagogical grounding goes quite a long way

## **Panel D: Knowledge Management**

### **Recommendations to Plenum**

- 1) Knowledge management (KM) needs to be understood as
  - All of the strategies, policies, and practices to
    - identify, capture, implement, and leverage vital skills, lessons learned, information, and knowledge
    - use continuous experiential learning to enable people to best accomplish the organization's missions.
  - A discipline that can be taught by and used in the school-house, and by operational units at every level.
- 2) Knowledge management is not what another organization does for you: the user is the practitioner.
  - There thus exists a need for leaders at all levels to learn the fundamentals, practice, and discipline for KM, as per their functions and the personnel they lead
- 3) What KM is, and how to be an active participant in it, needs to be a part of every stage of formal military learning, to include pre-accession.
  - Learning at the individual and organizational level of responsibility can therefore become part of the military ethos.
- 4) Part of that educative process is a directive requiring the submission of unit AARs. If hard won knowledge is not captured, it cannot be re-utilized
- 5) The Marine Corps needs a single fusion center or executive agent for KM in order to facilitate the interaction between USMC KM with COCOM KM, Combat Support Agencies KM, Inter-Agency KM, Int'l Partners KM and Private Sector KM
- 6) Marine Corps needs to emphasize use of existing organizations, such as MCCLL, that are proficient in knowledge management in order to leverage knowledge and KM vehicles to improve organizational effectiveness in educational and operational organizations
  - At the same time, services need to encourage individual units to engage in learning and knowledge management, so that KM and LL does not become creation and reproduction of group think.
- 7) Bring knowledge and learning to the Marine
  - Embrace and leverage eLearning as well as existing organizations and processes
- 8) Cultivate learning networks by facilitating self-selected groups, and by establishing principles for learning and KM networks, with KM push being omni-directional.

- 9) An effective KM program, and an effective learning organization, is one that examines not only what needs to be learned, but also critically assesses
- how the people in the organization learn
  - how the organization produces, reproduces and circulates knowledge
  - these learning methods and practices in the context of the lessons, ideas, skills, habits of mind, and mission requirements that the organization fits
  - ie, the “fit” between how/what we learn and what we must do/how we must do it

## **Panel E: Military as Culture**

### **Recommendations to Plenum**

- 1) Any educational system both reflects the culture which produced it, and influences the transmission or alteration of that culture’s structures and norms.
  - PME systems and curricular choices reflect the organizational culture and attitudinal norms of the services that created them
- 2) An armed force’s own culture is a key determinant of how it perceives its future roles and missions and how it will prepare for them.
- 3) Regardless of ongoing military activities, the US military retains cognitively and affectively an extremely narrow view of warfighting.
  - “Conventional,” “traditional,” and “kinetic” still describe what the military *believes it does*. “Unconventional” or “irregular” warfare, peacekeeping, and reconstruction define things that the military *thinks it does not do*, or *prefers not to do*.
  - The way in which the military talks and thinks about warfare during formal and informal military education can construct misconceptions, counter-factual expectations, or a cognitive dissonance regarding the nature of warfare.
- 4) There is a “transition dilemma,” or a “timing challenge” for those engaging in education and training for Long War, “irregular” skills.
  - In the near term they need to discover and align with the organizational culture of the services in which they teach, to achieve legitimacy for substance and method.
  - Over the long term, services must alter their understanding of the identity, traits, and functions of “warfighters” and the “warrior ethos” to include more emotional intelligence, social intelligence, commitment to intellectualism and reflective decision making.
- 5) To alter service cultures, PME must position itself as a self-conscious change agent.
  - In some cases, PME and training might need to “break the culture” of the student for the sake of the desired training objective, learning outcome, and operational need.

6) Change through PME must be preceded by sustained empirical, critical basic research and study of our own national, military, and service cultural perspectives, and how they influence both the identity of the military person, and the choices in research and in what is taught in PME institutions.

- Empirical work must determine what about national, military, and service cultures facilitate the kind of individual warfighter and unit culture needed in the Long War—and capitalize on those cultural aspects in training and education
- Research must also lead to targeting service cultural traits unsuited to the Long War, and determine methodological, curricular, and structural means to weed them out through training and education.

## **Panel F: Language**

### **Recommendations to Plenum**

1) Planners of language training policies and curricula need to better determine what the general purpose force user does not need, and does need, for language

- *Want* and *need* are *not* the same!

2) Limitations on Learning:

- Warfighters are not Defense Language Aptitude Battery (DLAB) “savvy”: services require tests of how people learn languages, not if they can
- The current operational tempo does not support pedagogically prudent training: so “need-to-have” capabilities are not adequately permeating operating forces.
- Commanders who identify communication as a “must-have” must in turn put the appropriate time, setting, and people into it.

3) Pre-deployment language guidelines: Learning needs to

- Be modular in time units, and diverse in media
- Emphasize group-based, scenario-driven communication
- Include evaluation that is face-to-face, oral and para-language performative, as well as group-based
- Espouse distance learning as supplement, not main focus

4) Leadership—at both senior *and* junior levels—needs to be engaged in supporting learning, selecting students (based on billet and aptitude), and providing setting for use and sustainment.

5) Expected capability outcomes need to be better keyed to time allotments and training settings

- Expectation management is key, and military learners/commanders require socialization to the art of the linguistically possible

- 6) Traditional Tests and Rating Systems (DLPT, OPI, ILR) are not suited to operator-level language learning.**
- Goals, target audience, and resultant data differ from Operational Language, and needs of operating environment
  - They do not inform a commander of the “whole capability” of soldier/Marine.
  - General purpose forces require a new language rating system better attuned to operational communicators
- 7) Some Requirements of an Operational Language (OL) Rating System**
- Reward comfort w imprecision, work-arounds
  - Focus on para-language, cultural aspects of language
  - Account for billet/functional domain
  - View verbal communication as a team effort
  - Bring together into one number listening/speaking
  - Be easily understandable for commander
- 8) Culture and language have to go together, culture preceding and merging into the language training**
- 9) Need to be clear and higher standards for the selection and training of interpreters, as well as training Marines/soldiers in the use of interpreters, monitoring of interpreters, etc.**
- 10) Marine Corps needs to study the 09-L program, and adapt to Marine Corps’ recruitment and assignment policies.**
- 11) Foreign Area/Regional Affairs Officers**
- Army FAOs need to be assigned and trained in a tactical fashion
  - Marine Corps needs to fill its FAO billets, train to “operational culture” knowledge of region and “operational language” competency, preparing FAOs for billets at regiment and task-force level
  - Marine Corps needs to “FAO-ize” its RAO program
  - Marine FAOs might be part of the “general purpose” force, but are they “general purpose” commodities, and should they be treated as such in terms of assignment, promotion, skills sustainment?
- 12) Objectivity—on the part of US military-employed instructors of language and culture with respect to mission and the (military) student audience—needs to be addressed by schools and commands**
- 13) Language exposure in the formal schools needs to follow a coherent strategy that**
- Builds upon pre-deployment training,
  - Prepares for pre-deployment training
  - Is keyed to the overall educational goals of the school, as per rank, place in career, and, when applicable, known post-graduation billets

## **Panel G: Information Operations**

### **Recommendations to the Plenum**

- 1) Information Operations must descend logically from the pursuit of strategic influence.
  - At every level, from theater-level to company-level, message and method must be attuned to the overall strategy, current needs, multiple audiences, and further-order effects.
  - This requires focus in training and education at every appropriate level of schooling and pre-deployment training.
- 2) Influence can only be pursued effectively within the cultural framework of the target audience.
  - Target audiences' communication methods, settings, and preferences are essential.
  - Influence operators—both dedicated IO officers and general purpose force members—must learn methods to indigenize the message and communication method, integrating host-nation personnel as much as possible.
- 3) In irregular warfare, the use of force must support the information war, not vice versa.
  - All actions speak, and are a form of communication.
  - Action-as-communication must be intentional, and synchronized at every level of command.
- 4) Training needs to apply focus to ensuring
  - Coordination of message and delivery from unit to unit
  - That communication-through-action not undermine communication-through-word.
- 5) IO is not about mitigating damage, but about accomplishing the primary mission.
  - In “war amongst the people” where the population is the center of gravity, influence through communication—by action or word—is not an adjunct, but a core component of any operation.
- 6) It is a challenge that doctrinally, in terms of training/education, and in practice, Public Affairs and IO are not integrated
  - PA and IO are mutually ignorant through not sharing a common lexicon, intent, or understanding of relationship to each other and overall scheme of maneuver.
  - This undermines PA and IO credibility in eyes of commanders and operators.
- 7) PA and IO personnel need better mutual learning opportunities
  - Dedicated PA and IO personnel need to learn each others' crafts, and training as well as education needs to strive for integration.
  - Commanders need to better learn through training and experience the need and methods to integrate PA and IO, along with PYSOP, Deception, etc., supporting a coordinated information campaign, recognized as such at the planning stage.

- 8) Information Operations need credible MOE.
  - MOE need to be trained to, and they need to reflect in-theater dynamics
- 9) Effective Information Operations require the continuous pursuit of knowledge about the local information environment: this is an intelligence, PTP, and individual responsibility, achieved by taking advantage of existing military, academic, commercial, and foreign research organizations' studies of regional press and broader socio-political dynamics.
- 10) Information Operations need to be taught to strategic planners, with a particular eye towards the realistic expectations of an influence campaign, given local regional realities, and the capabilities of forces on the ground. Strategic planners need to learn a better sense of the "art of the information possible."

## **Panel H: Leadership**

### Challenges

- 1) Environments have changed
- 2) Maturity levels in the force may not have changed (there is a shortfall of empirical data here) but decision making as well as responsibility over people, gear, and terrain, has been driven to lower levels.
- 3) Relative importance of tactical decisions at the operational/strategic levels has grown
  - The temptation has also grown for senior operational and strategic leaders to focus over-much on the tactical level
- 4) "Binary choices" are fewer and farther between
  - Many shades of gray means there are many more partially right choices, all of which have downsides.
  - Problems in contemporary operations are therefore "wicked."
- 5) "Time to train and educate" remains a significant shortfall ("the bag is already overfull"), particularly given the growing number and complexity of competencies expected of service people, at ever-younger levels.

### Proposed Solutions

- 1) Push education to the lowest levels practicable.
  - If LCpl/Cpl squad leaders are the norm they must be prepared to be squad leaders
- 2) Cognitive and affective skills are more important than ever: that begs for education *and* training (get balance right), with the training setting being educative.

- 3) Make better utilization of the social sciences to:
  - Better understand the changing demographics of the recruitment pool (understand the society from which we draw military people)
  - Identify leaders and leader potential, and consider different leadership traits for different operating environments
  - Improve training and education outcomes attuned to operational dynamics
  - Improve training and educational methods to achieve outcomes, attuned to the learning audiences
  - Provide better insights for the “non-kinetic” side
- 4) Leader development may be the key for IW
  - Ethical leadership and the ability to choose among multiple “both right and wrong choices” are perhaps more important than ever.
  - Cultivating the ability for all leaders to “pick through the gray,” as appropriate to level of maturity, education, and leadership, needs better integration into educational programs and training settings.

## **Panel I: Civil-Military Operations**

### **Recommendations to Plenum**

- 1) Draft and implement CMO “affective domain learning objectives” at each PME school (e.g. TBS, career, intermediate, and top level) so we sustain officer focus and appreciation for the value of CMO across the educational continuum.
- 2) Refine PME curriculum to adequately reflect the vital role that international relations, governance, basic economics, culture, and environmental concerns have in helping Marines understand other societies, states, and trans-national actors/issues while planning and executing CMO.
- 3) Teach CMO fundamentals germane to humanitarian operations, stability operations, IW, and conventional conflict in order to broaden Marines understanding of the inter-relationships between kinetic, non-kinetic, and information driven operations.
- 4) Ensure that CMO courses deal adequately with civil-military *relations* as understood in academia, as these influence the efficacy of our CMO initiatives in the host country.
- 5) Expand CMO instruction within PME institutions to include the role played by: host nation actors, non-state actors, international organizations, NGO’s, PVO’s, civilian universities, and supranational organizations.
- 6) Ensure PME curriculum includes IW/“hybrid-warfare” case studies such as Malaysia, Algeria, Vietnam, Balkans, Afghanistan and Iraq as well as functional case studies on CORDS and Provincial Reconstruction Teams (PRT’s).

- 7) Incorporate cross-national CMO experiences from our friends and Allies.
- 8) Devote curriculum time to USG interagency operations so Marines understand and appreciate the vital role civilian departments (e.g. State, Treasury, Energy) play in civil-military and IW operations.
- 9) Include more representatives from USG interagency (and likely foreign government partners) in PME schools as well as CMO education/training settings.
- 10) Use PME to enhance Marines ability to rapidly adapt, improvise, and succeed in unstable and highly complex operating environments requiring the integration of kinetic and non-kinetic tools.
- 11) Use PME to educate Marines on how to balance force protection concerns for CMO forces with the imperative to satisfy basic needs of the host nation population, aligned with overall mission goals as defined by commander
- 12) Expand CMO instruction in PME institutions to cover the following CIM (civil information management) concerns:
  - Information sharing between military and civilian CMO players
  - Importance of identifying adversary strengths and weaknesses
  - Potential need to refine the Marine Corps Planning Process (MCP) to facilitate CMO course of action development

## **Panel J: Culture**

### **Recommendations to Plenum**

- 1) Military services are not all the same—there is difference among branches as to incorporate culture and function, and there are differences within services among different MOs communities.
  - Harmonization is more important than uniformity in definitions and pedagogy
  - Definitions of “culture” should not be mandated and fixed in a cross-service, DOD-wide fashion.
  - Different military services and factions should be permitted to work with definitions and concepts that are relevant to their own operations.
- 2) Culture learning has many aspects to it, so learning needs to span the various domains appropriate to different learning settings:
  - Cultural skills and knowledge for specific functions in regions (psycho-motor and cognitive)
  - Principles and concepts applicable to planning and operating in multiple regions (cognitive, high-level)

- Cross-cultural competence (behavioral, cognitive, meta-cognitive, and affective), to include cultivating a motivation to learn, interpersonal skills, flexibility, and self-regulation
- Regional studies (cognitive)

3) Military schema, communicative styles, and learning styles affect and potentially limit the way that culture is understood. Developing teaching methods that frame culture in ways familiar to the military, while retaining the validity of the information, should be the goal.

- Culture educators must speak in an idiom appropriate to the audience, but must also preserve the integrity of the subject matter that they are communicating.
- If culture learning is not something traditionally conducted in a systematic fashion in the military, ought it to be conducted according to traditional military means, methods, and paradigms? It is likely that different teaching frames and learning styles are necessary to instill the different skills, affects, and knowledge necessary for cross-cultural competence.

4) Successful practices and definitions from the teaching environment need mechanisms facilitating their feedback into educational policy and doctrine, generating further success.

5) For learning about culture to be truly education, curricula must

- Include skills, affective, and cognitive/metacognitive materials and methodologies
- Build across the continuum of professional military education, in ways that are appropriate to maturity levels at different ranks, and consider unique MOS needs
- Integrate with overall pedagogical goals of individual schools (while helping to craft them!)
- Focus at the mid-to-upper levels on conceptual learning to aid in officers in all relevant aspects of the planning, execution, and unit-training processes
- To provide the basis for conceptual learning at the mid-to-upper levels, convey the necessary fundamentals at the most junior levels.
- Explicitly codify, and not presume consensus, on, learning outcomes, but avoid the temptation to over-codify and over-standardize to the point of strait-jacketing necessary habits of mind.
- Espouse, as a learning tool, confusion in context, method, and experiential outcome, given the confusion of IW contexts and cultural encounters

6) Needed is a systematic study of current teaching strategies in PME (case studies, role playing, wargaming, etc.) including an assessment of the strengths and limitations of each approach for teaching IW and culture.

- Systematic study by military educational practitioners should drive the development of a plan of teaching, based on solid understanding of the graduated scope of required capabilities.

## **Panel K: Preparing Tactical-Level Leaders**

### **Conclusions**

- 1) IW is now regular: Fulda Gap is now Irregular
- 2) Tactical actions bear strategic consequences
- 3) The culture of the services needs to be a culture of change
  - “Leadership” needs to mean “adaptiveness”
- 4) General Purpose Forces do maintain their utility, though personnel and retention policies need review for the new Long War challenges
- 5) The Current Operating Environment demands a review of width and depth of education
  - Who is responsible for leader development, and when, needs enduring concentration.
- 6) A Major Problem: Lack of Adequate time Devoted to Education
  - Objectives, outcomes, and curricular matter for IW education are all ill-defined, with redundancies and gaps.
  - How do we know if the instructors are qualified for the subject matter, or that they can teach in a fashion attuned to needed cognitive and affective outcomes?
  - Do we have instructor MOE?
  - Do we have courses on teaching styles and competencies?
  - The Majority of the formal schools still focus on conventional operations as the template
  - Training and education methods are still legacy approaches, without being problematized as per the new environment or learning audience.
  - Imbalance still favors training over education, and a training approach to education
  - A major goal needs to be teaching people thinking methods, and an agile proclivity to change

### **Proposed Solutions**

- 1) Expand the warrior ethos definition
  - This includes broadening the ethos of the Marine Corps from physically fighting our nation’s enemies and taking care of our own to include aspects of irregular warfare like building capacity, interagency and foreign operations, etc.

- 2) Reevaluate our baseline requirements
  - Critically look at what are considered the “basics” Marines need to know. For instance, all Marines must be able to employ a rifle. This is an accepted basic.
  - What are other basics?
  - What are basics for conventional as well as irregular operations all Marines must have a baseline knowledge and ability for?
  
- 3) Purposefully groom, and evaluate, a dedicated instructor pool
  - Particularly for enlisted schools, but officer schools as well, ensuring educators (not trainers) can effectively educate is as important to future operator performance as are the curriculum and learning setting.
  - Develop a dedicated training and educational cadre, schooled and experienced at education, by experienced pedagogues
  - Superior educators should be identified and maximized.
  
- 4) Incorporate scenario-based, experiential-focused instructional methods as the norm, not the “nice-to-have”: dilemma based, Socratic method, open-trajectory learning
  - Formally incorporate more decision training for enlisted and expand officer decision training.
  - More emphasis needs to be given to the non-kinetic aspect of decision making, which means exploring the why behind issues, not just acting in a timely and decisive manner.
  
- 5) Young Marines and Junior Marines need more sustained education as a focus of the organization’s efforts.
  - In addition to being trained in the basics with a discipline that yields automatic responses to orders and commands with tactical proficiency, young Marines (officer and enlisted) need to have their cognitive skills developed.
  - Because of the reality of IW, young Marines are making decisions at the undergraduate, graduate, and post-graduate level.
  - If the Corps really believes we have a smarter and more intelligent Marine than past generations, it needs to treat them that way, and guarantee that they be so.
  
- 6) Reinvigorate understandings of MCDP-1: Warfighting
  - Current Marine Corps doctrine, if read critically, is applicable to conventional and irregular warfare.
  - In addition to new doctrine initiatives, our existing doctrine needs to be reinforced, but with more focus on the non-conventional elements. MOOTW should not be an afterthought or side note.

## **Panel L: Emerging Perspectives in Professional Military Education**

### **Conclusions for Plenum**

- 1) Education is not training: Just in time training might work; just-in-time education will fail.
- 2) Education of the force, at all levels, is an investment in the success of the force, with—or in spite of—training
- 3) The answer is not necessarily an academic qualification, but investing in an educative, reasoning, critical thinking, and interactive approach from the beginning of the career: talking at is not same thing as cultivating problem solving.
- 4) “Educative Education” provides a wide-angle mental view encouraging complexity.
- 5) Needs analysis and evaluation are important: the feedback loop must be institutionalized, so that education not be too “bookish” or stale: bring education into the field, bring the field into education.
- 6) A “graduated” education continuum will progressively embed the cognitive skills of comprehension, analysis, synthesis and evaluation.
- 7) On Law of War, International Law, Professional and Ethical Standards in military operations:
  - There needs to be a basic consensus at what it is, what it means in an educational sense across the rungs of the military school system.
  - Then the concepts, principles, and implications need to be consistently taught and insisted upon in ways related to military missions, the home culture, and the requirements of officer ethics.

## **Panel M: Historical Perspectives on COIN**

### **Recommendations to Plenum on Best Practices**

- 1) Study historical COIN and insurgent leaders in context (culture, politics, religion, personality)
- 2) Study the transmission of ideas: beware that institutions shape doctrine and *vice versa* (your own and theirs)
- 3) Look for case studies that are “messy” – this is the norm
  - Recognize the hybrid nature/complexity of war

- 4) Look for case studies that help students develop empathy with insurgents and other actors
  - This creates situational and cultural awareness
- 6) Use primary sources (in original language, if possible)
  - Unfamiliar sources help students confront unfamiliar problems
- 7) Take students beyond the current debate and definitions
  - This removes them from their comfort zone and facilitates “out of the box” thinking/problem solving
- 8) If you are settling for “dualism” (good/bad, black/white) then you are oversimplifying
  - No one is ever that good or that bad
  - Get away from idea of a single, total truth, factually, ethically, interpretively
- 9) Consider good, classic fiction to study human motivation (fear, hate, faith, love)
  - Reading fiction helps demonstrate the complexity of human behavior
  - Focuses learner on idea of multiple sources of partial learning: there is no gospel
- 10) Limit the number of case studies and give instructors time/support to develop the best in detail
- 11) Consider innovative ways to teach: debates, student-insurgent planning and role-playing (to include actors’ reactions)
  - This helps students “get into their opponents head”
- 12) Case study analysis should have historical context and depth; and be layered
- 13) Case Studies should not obscure the purpose of studying a case
  - It is not to hear a good yarn, or become an expert in the case
  - It is in order to see general concepts at work in a particular place.
  - General concepts travel. Particulars do not.

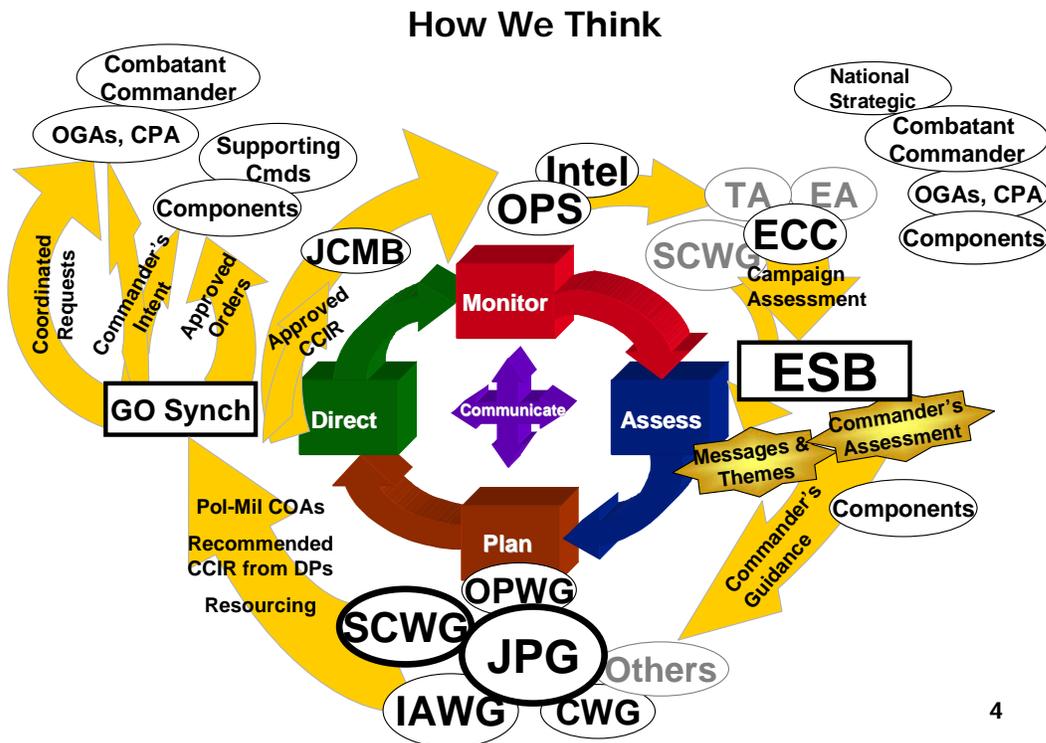
**Closing Remarks: LTG David Barno, USA (ret)**

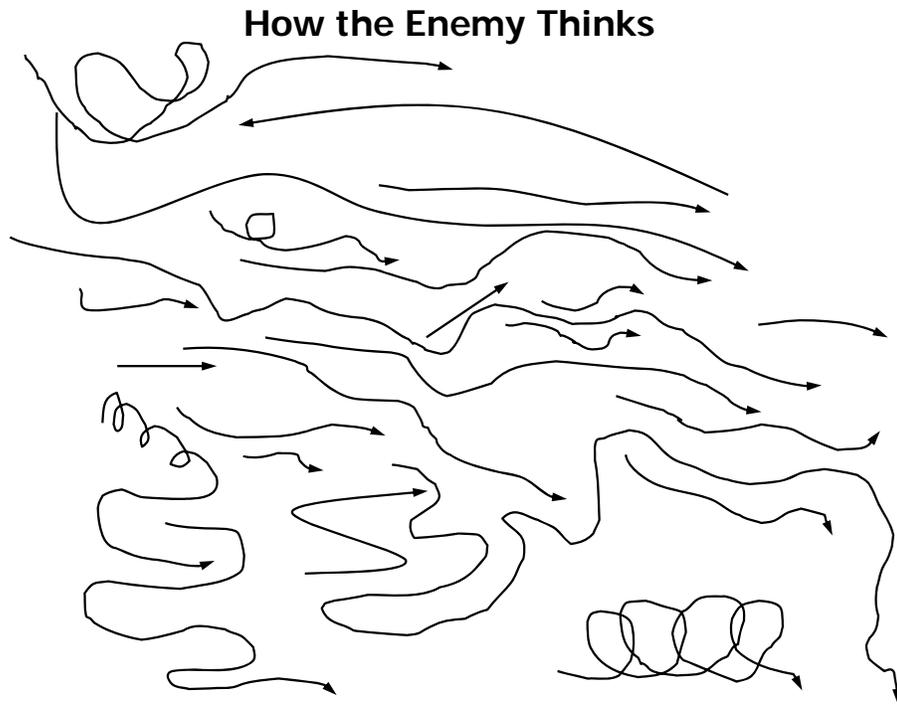
In his concluding remarks, LTG Barno highlighted many of the dynamics of current and future operating environments by reviewing his experiences as Combined Forces Commander Afghanistan (2003 – 2005), as well as his observations since then as Director of the Near East/South Asia Center of Strategic Studies at National Defense University.

*Excerpts form LTG Barno’s Presentation*

1) Contrasting approaches to thinking about the operational environment’s processes and players:

How We See It, How the Enemy Sees It





5

## 2) Contrasting Approaches to the Nature of Society and Conflict

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### Cultural Differences

#### Western

- National
- International Rule of Law
- Regional
- Social Groups
- Secular
- Facts
- Structured
- Short Term View

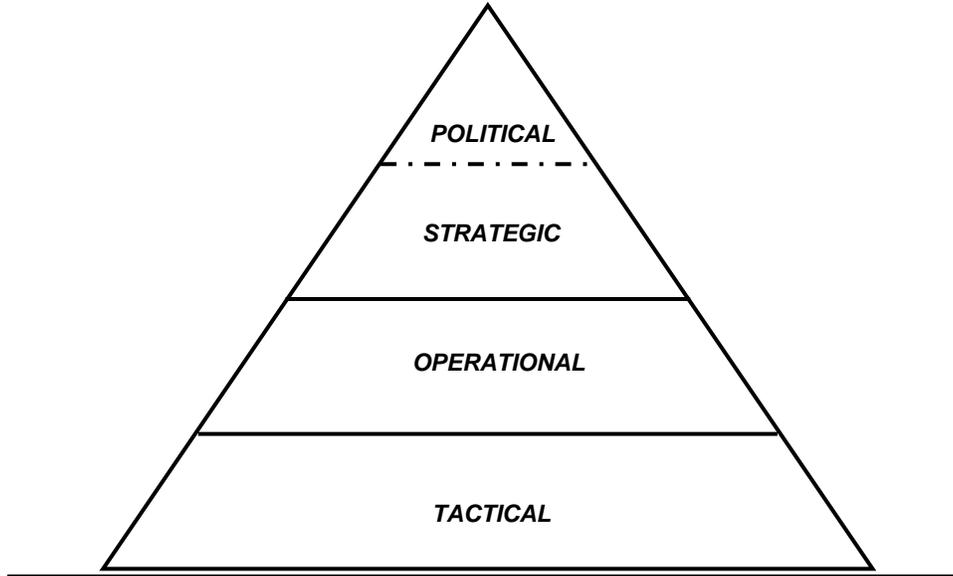
#### Afghan

- Ethnic
  - Tribal Law - *Pashtunwali*
  - Tribal
  - Familial
  - Religious
  - Perceptions
  - “Chaotic”
  - Long Term View
-

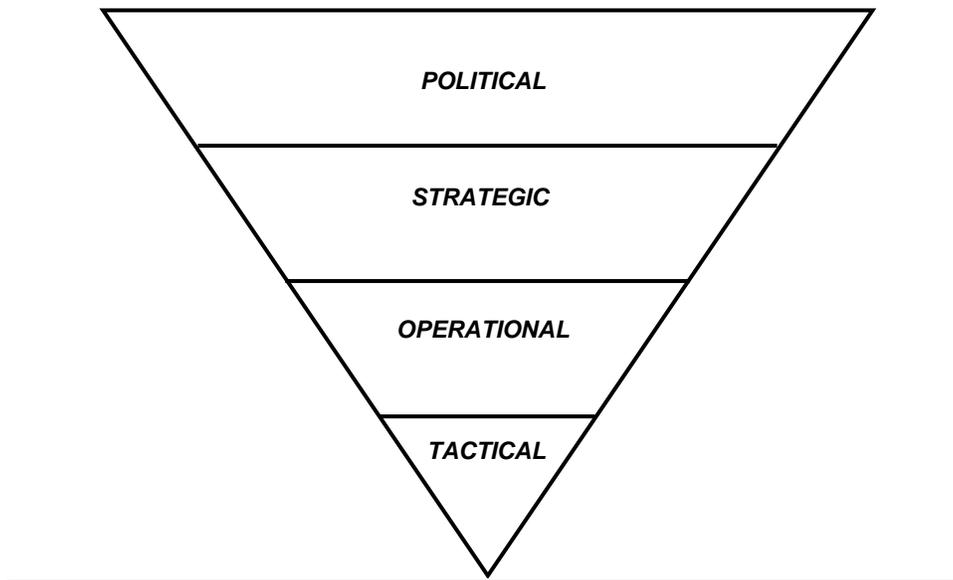
3) Contrasting constructs of priorities of effort and hierarchies of attention from US Military to Insurgents:

Reverse Pyramids

**US MILITARY CONSTRUCT**

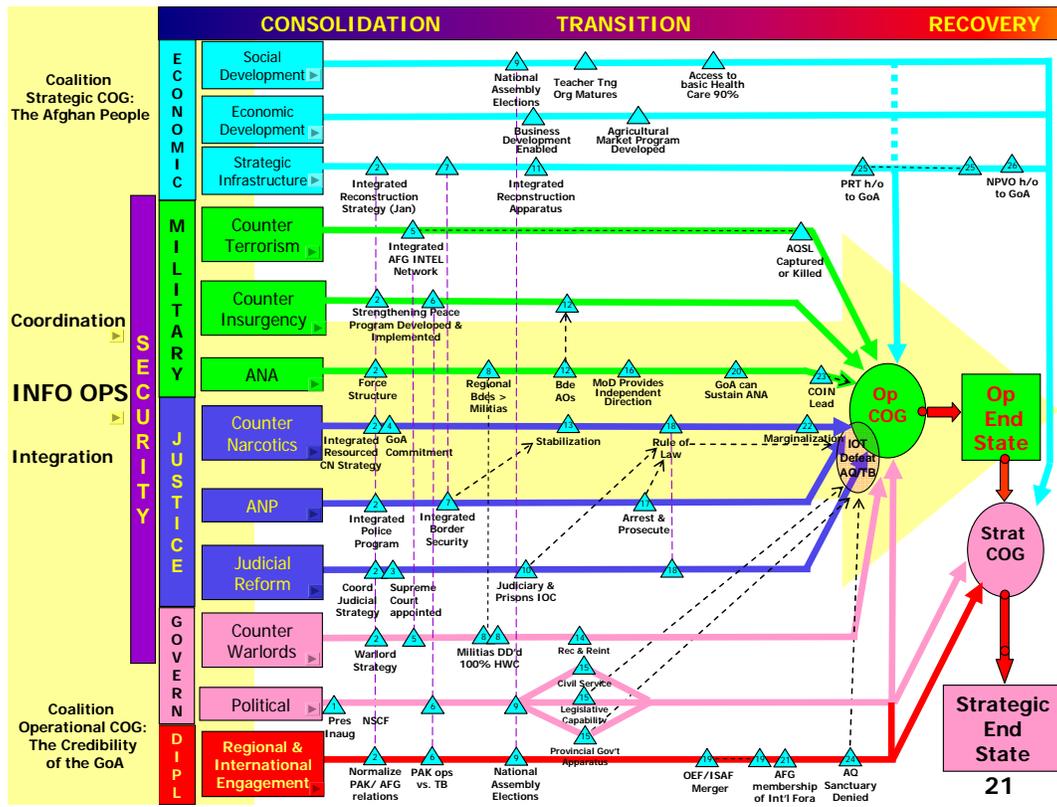


**INSURGENT CONSTRUCT**



4) The complicated “battle” space with sequenced and intermeshed Lines of Operation, requiring coordination and integration:

Economics, Justice, Governance and Diplomacy Combine with Info Ops to Bridge from Military Actions to Security Consolidation, transition, and Recovery



5) Working with the Inter-Agency (sometimes as the lead) is essential, but beware of different corporate cultures and methods

Military Mars and State Dept Venus

Mars vs. Venus

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Teamwork</li> <li>• Details</li> <li>• Planning</li> <li>• Structured</li> <li>• Time Sensitive</li> <li>• Process-focused</li> <li>• Action</li> <li>• The Mission</li> <li>• Impatient</li> <li>• Linear Problem Solving</li> <li>• Power Point</li> </ul> | <ul style="list-style-type: none"> <li>• Individuality</li> <li>• Broad brush</li> <li>• Improvisation</li> <li>• Ad Hoc</li> <li>• Not time driven</li> <li>• People are process</li> <li>• Reflection and reporting</li> <li>• The Cable</li> <li>• Patient to extremes</li> <li>• Informal Brainstorming</li> <li>• Free-ranging Discussions</li> </ul> |
|---|--|

## 6) Practical considerations in working with coalition partners and indigenous forces:

### a) Working with Allies as Staff Officers

- English Language?
- Computer Skills?
- Military Education?
- Security Clearances?
- Tour Length?
- What role can the newly arriving staff officer play to make the maximum contribution to the organization?
- How do we do “reception, welcome and integration” to the right standard?
- How do we share operational information across the staff, with SIPRNET?

### b) Working with the Host Nation

- Interpersonal Relations are Paramount
- Trust and Confidence
- Appreciation for Culture and Traditions
- Understanding of National History
- Guests in Their Country
- Linear Western Reasoning vs Non-linear Eastern Reasoning
- Partnership, not Dominance
- Willingness to Listen
- Respect, Respect, Respect!

## *Conclusions*

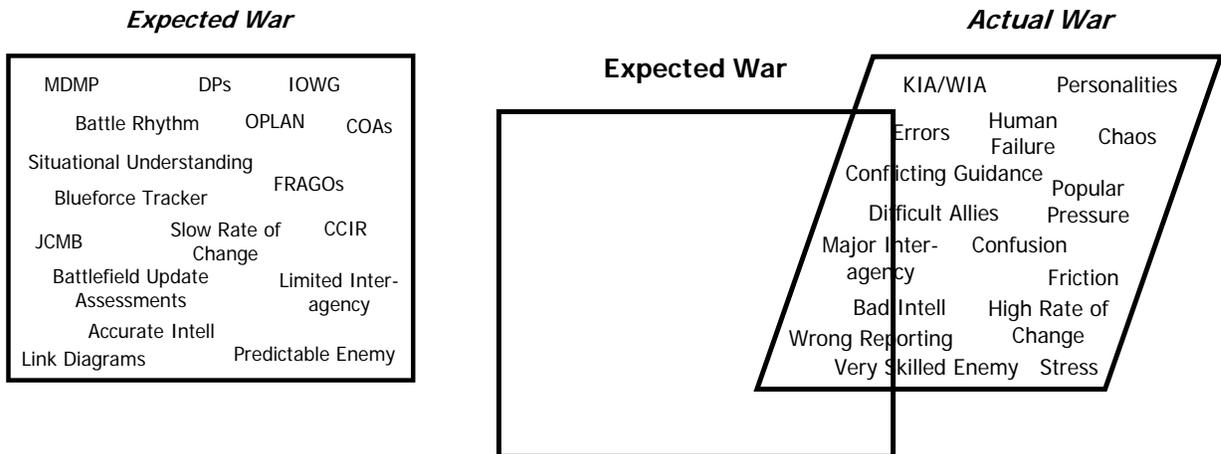
### a) Necessities of Leadership at Operational/Strategic Level

- Think Strategically: End State → *Stay Strategic as a Flag/General Officer*
- Public Perception of Your Effort → Daily CCIR
- Media → Critical Cdr Responsibility in a War of Ideas
- Communications Skills → your *Number One Talent*
- New Interpersonal Relations → Critical to Success, especially Outside the Military
- Interagency Relations → Pol-Mil is not a Zero Sum Game!
- Defense is from Mars, State is from Venus

**b) Pitfalls to avoid**

- “The Boiling Frog” → detecting change
- Changing every Sixty Days → getting ahead of the Situation
- Ignoring the Enemy, the People, and the Culture
- Intelligence and Confidence → the “80-20” Rule
- Continuity → “Ten One Year Wars”
- Inventing More Process → “Crack for Staff Officers”
- “Death by Metrics” → risks of ‘counting pencils’
- Detail Obscuring Reality → the Tyranny of the Small Picture
- Living in “JOC-World”
- Tactics, Tactics, Tactics → Winning Battles and Losing Wars
- Operating Without a “Concept of War”
- Fighting the Wrong War

**How Well Do you Adapt?**



## Appendix A

### Invitation to Propose Conference Papers from MajGen George Flynn



#### Pedagogy for the Long War: Teaching Irregular Warfare



A Joint Conference Sponsored by  
Marine Corps Training and Education Command  
and the  
United States Naval Academy

21 March 2007

Dear Colleague,

I would like to personally invite you to contribute to an upcoming joint conference co-sponsored by the Marine Corps Center for Advanced Operational Culture Learning, Marine Corps University, and the U.S. Naval Academy Center for Middle East and Islamic Studies. We will bring together uniformed, civilian, and international specialists to examine **Pedagogy for the Long War: Teaching Irregular Warfare**. This conference will take place **30 October – 1 November 2007** at the Alfred M Gray Research Center, Marine Corps Base **Quantico, Virginia**.

**Pedagogy for the Long War: Teaching Irregular Warfare** will focus on the educational aspects of civil-military operations; stability, security, transition, and reconstruction operations; information operations; integrated intelligence operations; unconventional warfare and counter-insurgency; joint, inter-agency, and coalition operations; foreign internal defense and building partnership capacity; culture, language, and religion-focused skills; and military psychology.

A full Call for Papers, including a complete list of paper submission topics is enclosed here, and is also located at the conference website:

<http://www.tecom.usmc.mil/caocl/CONfsandEvents/conference/index.asp>

To propose a paper for the conference, we invite you to complete the appropriate forms featured in the "paper proposal" link on the above website. **Paper proposals must be received via e-mail or regular mail no later than 20 April 2007**. The conference Steering Committee will make notification of acceptance by **9 May 2007**. The Steering Committee will require a full presentation draft by **1 October 2007**.

We look forward to receiving paper proposals, and we invite you also to disseminate the attached call for papers as widely as you see fit. Please direct any questions about **Pedagogy for the Long War: Teaching Irregular Warfare** to Elizabeth Mazzarella, Conference Coordinator, at [caocladmin@usmc.mil](mailto:caocladmin@usmc.mil), or by telephone, (703) 432-1735.

I hope to see you in October, and I thank you in advance for your participation in this joint conference.

Sincerely,

George J. Flynn  
Major General, United States Marine Corps  
Commanding General, Training and Education Command

## Appendix B

### Call for Paper Proposals



## Pedagogy for the Long War: Teaching Irregular Warfare



A Joint Conference Sponsored by  
Marine Corps Training and Education Command  
and the  
United States Naval Academy

*Marine Corps University  
Marine Corps Center for Advanced Operational Culture Learning  
Center for Middle East and Islamic Studies, United States Naval Academy*

The Conference Steering Committee for **Pedagogy for the Long War: Teaching Irregular Warfare** invites participants and paper submissions for a conference to be held 29 October through 2 November 2007 at the General Alfred M. Gray Research Center, in Quantico Virginia.

### *Background*

Since the end of the Cold War, the nature of military operations conducted by conventional forces has evolved: they have become longer in duration and more diverse in location and scope; they also require general purpose forces to perform more specialized tasks, and to distribute these tasks across all ranks and billets. This new mission profile is now understood as the “Long War.”

To define unique components of the “Long War” and develop them operationally, the US Department of Defense has gravitated to the concept of “Irregular Warfare.” Though there exist several definitions of “Irregular Warfare,” they all include certain elements: Irregular Warfare “has as its objective maintaining or undermining” “the credibility and/or legitimacy” “of a political authority by the application of indirect approaches and

non-conventional means to defeat an enemy by subversion, attrition, or exhaustion rather than [through] direct military confrontation,” “though it may employ the full range of military and other capabilities to seek asymmetric advantages, in order to erode an adversary’s power, influence, and will.”<sup>2</sup>

Likewise, several related tasks, activities, and lines of operation have been associated with the Long War and Irregular Warfare:

- Civil-Military and Stability, Security, Transition, and Reconstruction Operations
- Information Operations
- Integrated Intelligence Operations conducted by conventional forces and the joint/interagency community
- Unconventional Warfare and Counter-Insurgency
- Joint, Inter-Agency, and Coalition operations
- Foreign Internal Defense and Building Partnership Capacity
- Culture, Language And Region-Focused Skills
- Military Psychology

In prosecuting the “Long War” and grasping its Irregular Warfare aspects, therefore, the United States military’s training and education system now seeks to prepare officers and enlisted to use new skills in ever-diversifying operational environments, while ensuring that they also retain traditional capabilities.

### *The Conference*

Building upon recent lessons of the US and international community of military educators, **Pedagogy for the Long War: Teaching Irregular Warfare** focuses on shifting the concepts, curricula, and methods of military training and education for general purpose forces, in order to better prepare service people at every stage in their career for the diverse tasks unique to current and projected operating environments over the next twenty years. **It is a conference which focuses on pedagogy both as a topic for deliberation and as an activity animating participation.**

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<sup>2</sup> See *Multi-Service Concept for Irregular Warfare*, US Marine Corps Combat Development Command & US Special Operations Command Center for Knowledge and Futures, 2 Aug 2006, 5, 6.

### *Paper Submission and Conference Architecture*

The Conference Steering Committee invites paper submissions from uniformed and civilian educators in American and allied foreign military educational systems at all levels, as well as from civilian academicians whose research and teaching in broader American/international academia is concerned with these matters. The Steering Committee will accept up to thirty-six papers for presentation.

**Successful paper submissions will address the following major issues of concern in educating and training for the Long War, as they relate to the Irregular Warfare skills and lines of operation enumerated above:**

- Definitional debates and conceptual developments: Irregular Warfare, the Long War, Terrorism, Insurgency, Culture, etc.
- Epistemological and theoretical debates focused on military education and the intellectual constructs manifested within military education
- Pedagogy and Educational Methodologies
- Cognitive, learning, and skills linkages across the continuum of military education
- Promoting Irregular Warfare and Long War skills through training the Operating Forces
- Relationships between civilian academia/research and military learning and knowledge growth: the operationalization and militarization of academic learning
- Militaries as organizations, cultures, and ethnographic subjects
- The role of Islamist and other ideologies in contemporary conflict: military constructions of them, and implications for strategic communications and information operations
- Pre-enlistment/pre-accession education and its Long War utility
- The cultivation of subject matter expertise among professionals teaching knowledge and skills associated with success in the “Long War”
- Knowledge-management, learning processes, and operational impacts
- Common needs and specific learning requirements in the joint and inter-agency context

- Addressing new military educational needs while preserving traditional capabilities
- International Military experiences and educational approaches

**Highest quality presentations will form the basis for an edited volume to be used in military educational systems and larger academia.**

**Paper proposals must include**

- 1) The enclosed “Panelist” form
- 2) A 500-to-600-word descriptive abstract indicating the topic of the presentation, its relationship to pedagogy for the Long War, and, if appropriate, your research sources. Please ensure that your name only appear at the top right corner of the abstract page.
- 3) A short bio
- 4) A curriculum vitae

Please send these materials to

Long War Pedagogy Steering Committee  
Marine Corps Center for Advanced Operational Culture Learning  
1019 Elliott Road  
Quantico, VA 22134

Paper submissions will be reviewed in a double blind fashion, with notifications of acceptance within one month of submission. Conference attendees whose paper proposals are accepted will be required to send a full presentation draft to the Conference Steering Committee by 1 October 2007.<sup>3</sup>

Accepted papers will be organized into panels including a coordinator and three presenters. Presenters will have roughly 30 minutes each, with a 30-minute question-and-answer session to follow.

Panelists, coordinators, and attendees will subsequently participate in a 2-hour break-out session, permitting more in-depth and programmatic discussion of panel topics, to result in a final short presentation to conference plenum and compilation into a conference after-action review for Commanding General, Marine Corps Combat Development Command; Commanding General, Training and Education Command; Superintendent,

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<sup>3</sup> There is limited funding to support travel and accommodations for paper presenters whose TAD/TDY funds cannot support travel to Quantico, or whose academic institutions cannot support travel for panel presentation.

US Naval Academy; President, Marine Corps University and tenant activities aboard Marine Corps Base Quantico.

*Panel Coordination*

In addition to paper presenters, **Pedagogy for the Long War** invites active attendance from civilian and military pedagogues; academic researchers; representatives from the joint and inter-agency arena; foreign guests; and mid-to-senior-level PME students in the National Capitol Region.

The Steering Committee also invites **self-nominations for panel coordinators**, who will **moderate panels and subsequent break-out sessions**, and mentor panel rapporteurs in developing recommendations for report to the conference plenum and after action review.

**Self-Nominations for panel coordination must include**

- 1) The enclosed “Coordinator” form
- 2) A short bio

Please send these materials to

Long War Pedagogy Steering Committee  
Marine Corps Center for Advanced Operational Culture Learning  
1019 Elliott Road  
Quantico, VA 22134

You may also self-nominate for panel coordination at

[http://www.tecom.usmc.mil/caocl/CONfsandEvents/conf\\_test/index.asp](http://www.tecom.usmc.mil/caocl/CONfsandEvents/conf_test/index.asp)

*Administrative Point of Contact*

For any further administrative or logistical matters, please contact **Ms Elizabeth Mazzarella, Conference Coordinator, at 703-432-1725 ([caocladmin@usmc.mil](mailto:caocladmin@usmc.mil))**.

On behalf of the **Pedagogy for the Long War** conference steering committee. I enthusiastically invite your participation and attendance at this jointly sponsored conference, which will set the agenda for an educational approach preparing our service-personnel for success over the next several decades.



Barak A Salmoni, PhD  
Deputy Director  
Marine Corps Center for Advanced Operational Culture Learning  
Training and Education Command, Quantico, VA

## Appendix C

### Conference Welcome Letter: LtGen Jame F. Amos

#### WELCOME

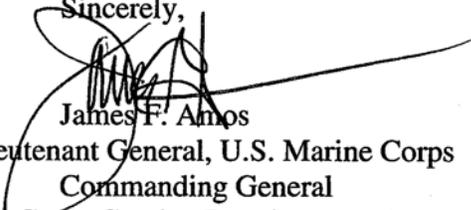
I would like to take this opportunity to welcome you to this conference, co-hosted by the Marine Corps University, the Marine Corps Center for Advanced Operational Culture Learning, and the Naval Academy's Center for Middle East and Islamic Studies. As a valued participant in this conference, you join colleagues from the Naval, joint, inter-agency, and international defense and security community. You have my sincere thanks for your interest and participation in this important event.

This conference offers a forum to examine the critical issues involved in preparing the next generation of defense and security leaders for the challenges associated with irregular operations. Throughout the event, panelists from both the operational and academic world will present research papers providing attendees a comprehensive understanding of the issues at stake in the Long War. Based on these presentations, we will ask the working groups to develop concrete recommendations for new approaches to training and education concepts and practices that address the challenges facing our military and civilian organizations the in Long War. The conference will culminate with working group out-briefs to the leadership of Marine Corps Combat Development Command and senior conference participants.

Each of you brings unique expertise and experience, critical to the success of this conference. Working together, we will explore our services' perspectives on Irregular Warfare skills, and develop a strategy for an integrated teaching framework. By combining your collective understandings of **Pedagogy for the Long War**, you will prepare a firm foundation for teaching Irregular Warfare in the 21st century.

Thank you for participating in this conference. I look forward to hearing your recommendations at the end of the conference.

Sincerely,



James F. Amos  
Lieutenant General, U.S. Marine Corps  
Commanding General  
Marine Corps Combat Development Command

## Appendix D

### Biographies of Key-Note Speakers and Panelists

#### Key-Note Speaker Biographies

Admiral Eric T. Olson is the eighth commander of US Special Operations Command (USSOCOM) headquartered at MacDill Air Force Base, Florida. USSOCOM ensures the readiness of joint special operations forces and, as directed, conducts operations worldwide.

A native of Tacoma, Washington, Admiral Olson graduated from the United States Naval Academy in 1973 and qualified as a Naval Special Warfare officer in 1974. He has served operationally in an Underwater Demolition Team, SEAL Team, SEAL Delivery Vehicle Team, Special Boat Squadron, and at the Naval Special Warfare Development Group. He has commanded at every level from SEAL Platoon officer-in-charge to Naval Special Warfare force commander.

Admiral Olson has participated in several conflicts and contingency operations, and has served as a SEAL instructor, strategy and tactics development officer and joint special operations staff officer. His overseas assignments include service as a United Nations Military Observer in Israel and Egypt, and as Navy Programs Officer in Tunisia. He served on the Navy staff as Assistant Deputy Chief of Naval Operations (Plans, Policy, and Operations).

Admiral Olson earned a Master of Arts degree in National Security Affairs at the Naval Postgraduate School and studied both Arabic and French at the Defense Language Institute. He is a Joint Specialty Officer and Political-Military Affairs sub-specialist with emphasis on Africa and the Middle East. His awards include the Distinguished Service Medal and Silver Star. He is married to the former Marilyn Cannata of New York City. They have two children, Daniel and Alyssa.

Lieutenant General Sir John Kiszely was commissioned into the Scots Guards from Sandhurst in 1969. He served with the Regiment as platoon commander, company commander and commanding officer in Great Britain, Northern Ireland, Germany, Cyprus and the Falkland Islands. His subsequent commands have been those of 7th Armoured Brigade and 1st Armoured Division, and twice in Bosnia - firstly as Commander Multi-National Division South West and later as Deputy Commander of the NATO force. His staff appointments have included chief of staff of an armoured brigade, an instructor and subsequently Deputy Commandant of the Army Staff College, and 3 tours in the Ministry of Defence, latterly as Assistant Chief of the Defence Staff (Resources and Plans).

Promoted to Lieutenant General in 2002, he was appointed Commander Regional Forces, Land Command, followed by 6 months in Iraq as Deputy Commanding General of the Multi-National Force and Senior British Military Representative. He took up his present appointment as Director of the Defence Academy in May 2005. He holds two honorary appointments: Colonel Commandant of the Intelligence Corps, and Honorary Colonel of the University of London Officer Training Corps. He was awarded the Military Cross in 1982, a Mention in Despatches in 1987, the Queen's Commendation for Valuable Service in 1997, Knight Commander of the Order of the Bath in 2004, and the United States Legion of Merit in 2005.

Lieutenant General Kiszely is married with 3 teenage sons. His main recreational interests are sailing (he is Admiral of the Army Sailing Association), shooting, music and chess. He has contributed chapters to 3 books ('The Science of War', 'Military Power: Land Warfare in Theory and Practice', and 'The Past as Prologue: History and the Military Profession') and is the author of numerous articles in military publications.

Lieutenant General David W. Barno (USA, ret) is a native of Endicott, New York, and was commissioned as an Infantry Officer from the United States Military Academy at West Point in 1976 with a Bachelor of Science degree. He also holds a Master of Arts Degree in National Security Studies from Georgetown University and is a graduate of the US Army Command and General Staff College and the US Army War College. He is also a graduate of the Syracuse University and Johns Hopkins National Security Leadership Program.

General Barno has served in a wide variety of command and staff positions in the continental United States and around the world. He has commanded at all levels from Lieutenant to Lieutenant General in peacetime and combat operations. Over the course of a thirty year military career, General Barno has participated in unit deployments to Korea, Thailand, the Philippines, Germany, Grenada, Panama, New Zealand, Honduras, and Hungary. He served in combat as a Ranger Company Commander in Grenada during Operation Urgent Fury (1983) and as a Ranger Battalion Operations officer in Panama during Operation Just Cause (1989). General Barno commanded a parachute infantry battalion in the 82nd Airborne Division and later commanded the 2nd Ranger Battalion completing his third tour with US Special Operations Forces. Upon completion of brigade command at Fort Polk, Louisiana, he directed the Joint Task Force training program at what is now United States Joint Forces Command in Norfolk, Virginia. Following selection to Brigadier General, General Barno was assigned in June 1999 as the Assistant Division Commander (Operations) of the 25th Infantry Division (Light) at Schofield Barracks, Hawaii, and later as Deputy Director of Operations, United States Pacific Command.

After selection to Major General in 2001, he served as Commanding General, United States Army Training Center and Fort Jackson. During this assignment, he deployed to Hungary in 2003 as the Commanding General of Task Force Warrior with the mission to train the free Iraqi forces in support of Operation Iraqi Freedom. General Barno deployed in October 2003 to Afghanistan, commanding over 20,000 US and Coalition Forces in

Combined Forces Command-Afghanistan as part of Operation Enduring Freedom. For 19 months in this position, he was responsible to US Central Command for regional efforts in Afghanistan, most of Pakistan and the southern parts of Uzbekistan and Tajikistan. His duties involved close coordination with the United States Department of State, the Government of Afghanistan, the United Nations, NATO International Security Assistance Force and the senior military leaders of many surrounding nations.

Since assuming duties as Director of the NESAC Center, General Barno has traveled widely throughout the greater Middle East and lectured in a number of locations to include Harvard, Yale, Johns Hopkins SAIS, West Point, the US Army and Naval War Colleges and overseas. He has recently been appointed as the Chairman of the Advisory Committee on Operation Iraqi Freedom and Operation Enduring Freedom Veterans and Families by Secretary of Veterans Affairs James Nicholson. General Barno frequently serves as an expert consultant on counterinsurgency, the war on terror and the changing nature of conflict, supporting a wide range of government and other organizations.

General Barno's many awards and decorations include the Combat Infantryman's Badge, the Defense Distinguished Service Medal, the Distinguished Service Medal with oak leaf cluster, the Defense Superior Service Medal (three awards), the Legion of Merit with oak leaf cluster, the Bronze Star, the Meritorious Service Medal (with silver and bronze oak leaf clusters), the NATO Meritorious Service Medal, the Department of State Meritorious Honor Award and several campaign and unit awards for combat actions. He also has been awarded the Master Parachutist Badge with Combat Star, Pathfinder Badge, Ranger Tab, and German parachutist badge.

Major General George Flynn graduated from the United States Naval Academy in 1975. He holds a Master of Arts Degree in International Relations from Salve Regina College, a Master of Arts Degree in National Security and Strategic Studies from the Naval War College, and a Master of Science Degree in National Security and Strategy from the National War College. He is a Distinguished Graduate of the College of Naval Command and Staff and the National War College.

Major General Flynn's command assignments include: Commanding Officer, HQ Battery, 2nd Battalion, 12th Marines; (1979-1980); Commanding Officer, L Battery, 2nd Battalion, 12th Marines (1980); Commanding Officer, P Battery, 5th Battalion, 10th Marines (1984-1985); Commanding Officer, 5th Battalion, 10th Marines (1992-1993); Commanding Officer, Officer Candidates School (1999-2001), Commanding General, Training Command (2002-2004).

Major General Flynn's staff assignments include: Forward Observer, Fire Direction Officer, Battery Executive Officer and S-4 A, 2nd Battalion, 11th Marines (1976-1979); Officer Selection Officer, Manchester, New Hampshire, (1981-1984), Operations Officer, 5th Battalion, 10th Marines (1985-1986), Plans Officer, Plans Policies and Operations Department, Headquarters Marine Corps (1987-1989); Junior Aide-de-Camp to the Commandant of the Marine Corps (1989-1991); Assistant Fire Support Coordinator, 2d Marine Division (1991-1992); Future Operations Officer, III Marine Expeditionary Force

(1994-1995); Military Assistant to the Executive Secretary to the Secretary of Defense (1995-1997); Military Fellow, Council on Foreign Relations (1997-1998); Head, Strategic Initiatives Group, Headquarters Marine Corps (1998-1999); Military Secretary to the Commandant of the Marine Corps (2001-2002); Deputy Commanding General, Training and Education Command (2002-2004). Chief of Staff and Director, Command Support Center, United States Special Operations Command (2004-2006).

His personal decorations include the Defense Superior Service Medal with oak leaf cluster, the Legion of Merit with three gold stars, the Meritorious Service Medal and the Navy-Marine Corps Commendation Medal with gold star.

Colonel W.P. (Bill) Monfries, ADC, Colonel Education and Training Systems/Head of Corps RAAEC, was born in Adelaide (as plain William) and educated at Prince Alfred College and Adelaide University. He was commissioned into the Royal Australian Infantry Corps in 1974 and enjoyed a number of regimental postings in the Army Reserve, mostly involving watercraft and high explosives. He transferred to full-time service in the Royal Australian Army Educational Corps in June 1982. His early postings were in Education Wings, instructing on soldier promotion courses. As a Captain, he instructed Staff Cadets at the Royal Military College, Duntroon, many of whom are now his peers. He then spent three years as the Training Development Officer at the Army Apprentices School near Albury/Wodonga. Colonel Monfries was promoted to Major in 1991 and served on exchange with the Royal Australian Navy at HMAS CERBERUS as the Training Development Coordinator. He then immersed himself in the world of career management in Canberra as the Career Adviser Personnel Services at the Directorate of Officer Career Management-Army. He was promoted to Lieutenant Colonel in December 1995 and became the Staff Officer Grade One Training Systems and Education at Headquarters Training Command-Army, as well as Deputy Director of Army Education. In 1997, Colonel Monfries became the Regional Education Officer and Manager Education Training and Development for the Sydney region.

Colonel Monfries returned to Headquarters Training Command - Army in January 2003, as the Staff Officer Grade One Training Systems. He was promoted to Colonel on 12 January 2004, when he assumed command of the Training Technology Centre. Upon his reorganisation of that unit in mid-2005 he returned to Headquarters Training Command to raise the Education and Training Systems Branch and reinvigorate the Command's focus on education and training. His current professional interest is in the education and training challenges for security and land forces in the 21st Century. Colonel Monfries is Head of Corps for the Royal Australian Army Educational Corps and is an Aide de Camp to the Governor General. He has a Bachelor of Arts in English and History, a Diploma in Training and Assessment Systems, and aspires to completing, one day, the requirements for a Graduate Diploma in Human Resource Management.

## **Panelist Biographies**

Dr Allison Abbe is a Research Psychologist in the Leader Development Research Unit of the US Army Research Institute, where she conducts research on measuring and training cross-cultural competence. Dr Abbe previously taught in graduate and undergraduate psychology programs at the George Washington University, Marymount University, and the University of California, Riverside. Other research interests and experience relate to social aspects of human cognition, including stereotyping, small group dynamics, and cognitive biases. [Allison.abbe@us.army.mil](mailto:Allison.abbe@us.army.mil)

Col Larry Aitken enrolled into the Canadian Forces in 1978, and graduated from Royal Military College of Canada in 1982 with a degree in Chemical Engineering, later completing a Masters in Electrical Engineering from Queen's University. A Signals Officer, he has spent a varied career in and out of operations, instruction, engineering, project management and command. A graduate of Army Command and Staff College, the Canadian Forces Command and Staff College and the Advanced Military Studies Program, Colonel Aitken served in Army Staff as Director of Signals, and Director of Land Command Information. In 2006, he deployed for one year as the Deputy Chief of Staff for Operations and Plans for the UN Mission, MONUC, in the Democratic Republic of Congo. He is currently the Director of Training and Education at the Canadian Defence Academy.

LtCol Gil Ariely, PhD initiated and helped inaugurate the field of Operational Knowledge Management in the Israeli Defense Forces Ground Forces since 2001 to date, and helped lead the efforts of learning during fighting in the war in Lebanon 2006. He is acting CKO (Chief Knowledge Officer) of the Ground Forces IDF, and commanding officer of the Lessons Learned teams. He has written the IDF's first doctrine book on Operational Knowledge Management and Learning. LtCol (res) Ariely was Deputy Commander of a Counter Terror Unit in the IDF, and is also CKO (Chief Knowledge Officer) of the Institute for Counter-Terrorism (ICT) at the Interdisciplinary Center Herzliya, Israel. [GAriely@idc.ac.il](mailto:GAriely@idc.ac.il)

Dr John R. Ballard is Professor of Strategic Studies at the US National War College in Washington, DC. A retired Marine Colonel and Iraq war veteran, he has served previously as Professor of Joint Military Operations at the US Naval War College, the Foundation Professor of Defence Studies at New Zealand's Massey University and as Professor of History at the US Joint Forces Staff College. He is a graduate of the US Naval Academy and the French Command and Staff College in Paris. He earned his masters degree at California State University and received his doctorate from the Catholic University of America. Dr Ballard is the author of four books: Upholding Democracy (Praeger, 1997), Continuity during the Storm (Greenwood, 2000), Fighting for Fallujah (Praeger Security International, 2006), and Triumph of Self-Determination (Praeger Security International, 2008). He is a recipient of the US Army Historical Foundation's Distinguished Writing Award and the Department of the Navy Meritorious Civilian Service Medal. [Ballardj5@ndu.edu](mailto:Ballardj5@ndu.edu)

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## Appendix E

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## Appendix F

### List of Organizations Represented

1. 1st IO Command (Land)
2. 2<sup>nd</sup> Marine Air Wing
3. Army Asymmetric Warfare Office
4. Army Capabilities Integration Center Forward
5. Asymmetric Warfare Group
6. Australian Army
7. Booz Allen Hamilton
8. British Army
9. Canadian Armed Forces
10. Canadian Defence Academy
11. Canadian Forces College
12. Center for Irregular Warfare and Counterinsurgency, US Air Force
13. Center for Naval Analyses
14. Central Intelligence Agency
15. Clover & A Bee Films
16. Columbia Basin College
17. Cranfield University
18. Culture Center, US Army Intelligence Center
19. Defence Academy of the United Kingdom
20. Defense Equal Opportunity Management Institute
21. Defense Language Office
22. Department of National Defence, Canada
23. Department of the Navy
24. Department of War Studies, King's College London
25. Dutch Marines
26. Federal Bureau of Investigation
27. Foreign Military Studies Office
28. French Ground Forces
29. G3/5, Headquarters Dept of Army
30. George C Marshall Center for European Security Studies
31. German Army
32. Graduate Program in Homeland Security, San Diego State University
33. US Air Force Language and Culture Programs Office
34. Headquarters Marine Corps
35. HQ Dept of Army G-3/5/7
36. HQMC Policy, Plans, and Operations
37. HQMC Strategy and Plans Division
38. HQMC/International Issues Branch

39. Human Terrain System
40. Infantry Training Battalion, SOI (West)
41. Institute for Advanced Study, Princeton University
42. Instructor Battalion, The Basic School, USMC
43. Japanese Self Defense Forces
44. Joint forces Command/Concepts, Doctrine, Experimentation, J-9
45. Joint Center for International Security Force Assistance
46. Joint force Command, Joint Urban Operations Office
47. Joint Forces Staff College
48. Joint Special Operations University
49. Joint Staff, J-7
50. Joint Staff/J-7/Joint Education Branch
51. Joint Staff/J-8/FAMD
52. Lebanese Army
53. Lockheed Martin, Simulation Training and Support
54. Marine Corps Center for Advanced Operational Culture Learning
55. Marine Corps Center for Lessons Learned
56. Marine Corps Combat Development Command
57. Marine Corps Command and Staff College
58. Marine Corps Expeditionary Warfare School
59. Marine Corps Intelligence Activity
60. Marine Corps Intelligence Schools
61. Marine Corps Training and Education Command
62. Marine Corps University
63. Marine Corps University Enlisted Professional Military Education Policy & Operations
64. Marine Corps University Foundation
65. Marine Corps War College
66. Marine Corps Warfighting Lab
67. Marine Forces Command
68. Marine forces Pacific G-5
69. Marine Forces Reserve G-3/5
70. Marine Special Operations Advisory Group
71. Military Psychology Center, Israel Defense Forces Ground Forces Command
72. MITRE Tech, Inc.
73. National Defense University
74. National War College
75. Naval Postgraduate School
76. Navy and Marine Corps Intelligence Training Center
77. Navy Expeditionary Combat Command
78. Netherlands Defence Academy

79. Nimitz Library, US Naval Academy
80. Office of the Secretary of Defense
81. Office of the Secretary of Defense Stability Operations and Low-Intensity Conflict Office
82. Office of the Undersecretary of Defense for Policy
83. Peace Keeping and Stability Operations Institute
84. Queen's University, Department of History
85. Riverside Research Institute
86. Royal Australian Army Education Corps
87. Royal Marines
88. Royal Military College of Canada
89. School of Advanced Warfighting
90. Sygnetics, Inc.
91. The Johns Hopkins University
92. Thomas Associates, Inc.
93. UK Centre for Human Systems
94. United States Institute of Peace
95. US Naval Academy
96. US Navy Headquarters
97. UK Defence Science & Technology Laboratory
98. United States Special Operations Command
99. US Air Force Academy
100. US Army Command and General Staff College
101. US Army Intelligence Center
102. US Army Research Institute
103. US Army/Marine Corps COIN Center
104. US Coast Guard
105. US Marine Corps Forces, South
106. USMC Command and Staff College
107. USMC Infantry Officer Course
108. USMC School of Infantry – West
109. USMC Strategic Vision Group
110. USSOCOM J10
111. Watson Institute, Brown University



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