

US JOINT FORCES COMMAND MORNING NEWS CLIPS

See below for full article texts

I. Afghanistan

A. “Gates Visits Afghanistan To Meet With Karzai” By Elisabeth Bumiller *New York Times*

Article reports that Defense Secretary Robert M. Gates arrived on an unannounced visit to Afghanistan on Monday morning to meet with President Hamid Karzai and NATO commanders, and to review plans for a major American-led offensive into the Taliban heartland of Kandahar. Article does not mention USJFCOM.

II. Capability Portfolio Reviews

A. “Army Secretary Directs One-Year Capability Portfolio Review” By Jason Sherman *Inside Defense.com*

Article reports that Army Secretary John McHugh has called for an overhaul of the way the service prepares its weapons development and spending plans, directing the immediate implementation of a new "capability portfolio review strategy" designed to inform "tough decisions" the service will make in its fiscal years 2012 to 2017 investment blueprint. Article does not mention USJFCOM.

III. Cybersecurity

A. “Cyberwar Declared As China Hunts For The West’s Intelligence Secrets” By Michael Evans and Giles Whittell *Times of London*

Article reports that urgent warnings have been circulated throughout NATO and the European Union for secret intelligence material to be protected from a recent surge in cyberwar attacks originating in China. Article does not mention USJFCOM.

IV. Unmanned Programs

A. “Senators Question Army Leadership On UAV Redundancies, Mi-17s” By Tony Bertuca *Inside the Army*

Article reports that Sen. Byron Dorgan (D-ND) is calling for answers on why the Army is procuring and fielding unmanned aerial vehicles similar to those of the Air Force. “I have wondered aloud and questioned why we have almost identical programs run by both the Army and the Air Force – Sky Warriors, the Warriors and the Predators,” Dorgan said at a Senate Appropriations defense subcommittee hearing last week. Article does not mention USJFCOM.

V. National Security Thought

A. “Expeditionary ethos” By Frank G. Hoffman *Armed Forces Journalist*

Article advocates the point of view that shifts in global security landscape demand changes in force posture.

B. “The Last QDR? What the Pentagon should learn from corporations about strategic planning” By Ionut C. Popescu *Armed Forces Journal*

Article is a signed opinion piece advocating a more modernized approach than what the QDR offers as a method for developing the DoD’s strategic planning. Article does not mention USJFCOM.

A product of:

Gates Visits Afghanistan To Meet With Karzai
By Elisabeth Bumiller
New York Times
March 8, 2010

Defense Secretary Robert M. Gates arrived on an unannounced visit to Afghanistan on Monday morning to meet with President Hamid Karzai and NATO commanders, and to review plans for a major American-led offensive into the Taliban heartland of Kandahar.

Mr. Gates gave no date for the anticipated push into the city of Kandahar, which has a population of 900,000 and is the capital of Kandahar Province in southern Afghanistan, but he said that “there is some very hard fighting, very hard days ahead.” Administration officials have only said that the campaign, a central mission for the 30,000 extra forces that President Obama has ordered to Afghanistan, will occur sometime this year.

Mr. Gates spoke to reporters on his plane en route to Kabul. So far, Mr. Gates said, about 6,000 of the 30,000 reinforcements have arrived in the country. The rest should be in place by the end of August, he said, which will bring the total United States forces in Afghanistan to about 100,000.

The defense secretary also said that despite the American-led success last month in largely routing the Taliban from the city of Marja in Helmand Province, it was still too early to expect top Taliban leaders to reconcile with the Afghan government, as both the United States and Mr. Karzai would like.

“I think we ought not to get too impatient,” Mr. Gates said. “I do believe that the senior Taliban are only going to be interested in reconciling in terms that are acceptable to the Afghan government and those of us supporting it when they see that the likelihood of their being successful has been cast into serious doubt. My guess is they’re not at that point yet.”

Mr. Gates is visiting Kabul during the same week that President Mahmoud Ahmadinejad of Iran is expected in the Afghan capital to meet with Mr. Karzai. Mr. Gates told reporters that Iran was “playing a double game in Afghanistan – they want to maintain a good relationship with the Afghan government, they also want to do everything they possibly can to hurt us, or for us not to be successful. And they’re trying to thread that.”

Mr. Gates said he believed that Iran was providing money and “some low level of support” to the Taliban in Afghanistan, and that “they also understand that our reaction, should they get too aggressive in this, is not one they would want to think about.”

Geoff Morrell, the Pentagon press secretary, swiftly amended Mr. Gates’s comments on Iran and said that the defense secretary meant to say that any American reaction would occur within Afghanistan, not elsewhere.

As Iran has continued its nuclear program despite American and international pressure to curtail it, there has been speculation for years that the United States or Israel might bomb Iran’s nuclear facilities.

Mr. Gates said he also planned to talk to Mr. Karzai about the Afghan president’s recent visit to Marja, where Mr. Karzai was besieged by complaints about the United States military operation, the lack of an Afghan government presence in the area for years and a list of other grievances. Mr. Gates tried to put the pummeling in a positive light.

He said that the complaints were to be expected, and that it was good that Mr. Karzai, who has long had limited influence outside the capital, was traveling to other parts of the country to talk to Afghan citizens.

"This is the first time these guys have had the opportunity to interact with somebody from the central government, having been under the thumb of the Taliban for at least a couple of years," Mr. Gates said.

"And for them to say we need development, we need less corruption, we need services, we need projects, we don't like civilian casualties, we don't like night raids – there was nothing that they said that I would have found surprising, frankly. It's like when I go out and have a town hall with our troops or meet with the spouses, they're not reticent about telling you when things aren't working."

Mr. Gates said he was unsure what to think about reports that the handpicked new district chief for Marja, Hajji Abdul Zahir, had served jail time in Germany on charges of stabbing his stepson. Mr. Zahir has denied the reports, and a NATO spokesman in Kabul has quoted Mark Sedwill, the senior NATO official in Kabul, as saying, "This country is not going to be run by choir boys."

Mr. Gates weighed in with this: "The question is, if the guy committed a crime and served the time, then does that automatically rule him out? I mean I just don't know the answer to the question."

Army Secretary Directs One-Year Capability Portfolio Review
By Jason Sherman
Inside Defense.com
March 5, 2010

Army Secretary John McHugh has called for an overhaul of the way the service prepares its weapons development and spending plans, directing the immediate implementation of a new "capability portfolio review strategy" designed to inform "tough decisions" the service will make in its fiscal years 2012 to 2017 investment blueprint.

In a Feb. 22 memo to service leaders, McHugh appointed Vice Chief of Staff Gen. Peter Chiarelli to lead a one-year service-wide "review and assessment of requirements across all Army capability portfolios." In addition, McHugh has directed Army Under Secretary Joseph Westphal to make recommendations on whether to "revalidate, modify or terminate" specific requirements based on the results of these capability portfolio reviews.

"My decisions on these recommendations will establish departmental priorities for investment, research, development and acquisition, and/or life-cycle sustainment, to include force structure and training, across each Army portfolio," McHugh wrote in the memo. InsideDefense.com obtained a copy of the previously unreported memo.

According to an Army official, the goal behind the reviews is to holistically assess the service's weapon system requirements in line with efforts the Office of the Secretary of Defense and the Joint Staff have led in recent years to examine capabilities across institutional and functional lines.

"The Army will soon be required to make tough decisions affecting our input to the program objective memorandum for [fiscal years] 2012 to 2017," McHugh wrote. "To ensure that we both meet the needs of the operational Army and program, budget, and execute funds wisely, I have established capability portfolio reviews." The review strategy is to be implemented immediately, McHugh wrote, and will "remain in effect for a period of one year."

The capability reviews will not supplant the authority of other deliberative Army bodies and processes with a key role in deciding what weapon systems to develop and acquire, McHugh wrote. These include the Army Requirements Oversight Council, the Army Systems Acquisition Review Council or the Configuration Steering Board.

Each of the capability portfolio reviews “is envisioned as the first step in the evolution of an integrated process for the informed revalidation of the operational value of requirements,” the Army secretary wrote.

By late February 2011, the end of the one-year charter for the new review strategy, McHugh wants Army leaders to provide “comprehensive and detailed recommendations” on whether to terminate capability portfolio reviews, partially incorporate them into existing requirements and acquisition processes or “otherwise restyle these processes or implement some other appropriate method for review, assessment and revalidation of Army requirements.”

In 2008, the Defense Department issued a directive – No. 7045.20 – on “Capability Portfolio Management.” It was designed to give select combatant commanders and senior Pentagon civilians new and unprecedented influence over a wide range of capabilities – including some new weapons systems – the Army, Air Force, Navy and Marine Corps develop.

This directive aims to adopt private-sector best practice of “portfolio management” to facilitate cross-service assessments of weapon systems and force structure and permit DOD leaders to “better balance” strategic risks and make capability trade-offs between services, Pentagon officials said.

Cyberwar Declared As China Hunts For The West’s Intelligence Secrets
By Michael Evans and Giles Whittell
Times of London
March 8, 2010

Urgent warnings have been circulated throughout NATO and the European Union for secret intelligence material to be protected from a recent surge in cyberwar attacks originating in China.

The attacks have also hit government and military institutions in the United States, where analysts said that the West had no effective response and that EU systems were especially vulnerable because most cyber security efforts were left to member states.

NATO diplomatic sources told *The Times*: “Everyone has been made aware that the Chinese have become very active with cyber-attacks and we’re now getting regular warnings from the office for internal security.” The sources said that the number of attacks had increased significantly over the past 12 months, with China among the most active players.

In the U.S., an official report released on Friday said the number of attacks on Congress and other government agencies had risen exponentially in the past year to an estimated 1.6 billion every month. The Chinese cyber-penetration of key offices in both NATO and the EU has led to restrictions in the normal flow of intelligence because there are concerns that secret intelligence reports might be vulnerable.

Sources at the Office for Cyber Security at the Cabinet Office in London, set up last year, said there were two forms of attack: those focusing on disrupting computer systems and others involving “fishing trips” for sensitive information. A special team has been set up at GCHQ, the government communications headquarters in Gloucestershire, to counter the growing cyber-threat affecting intelligence material. The team becomes operational this month.

British and American cyber defenses are among the most sophisticated in the world, but “the EU is less competent”, James Lewis, of the Centre for Strategic and International Studies, said. “The porousness of the European institutions makes them a good target for penetration. They are of interest to the Chinese on issues from arms sales and nuclear non-proliferation to Tibet and energy.”

The lack of routine intelligence sharing between the U.S. and the EU also contributes to the vulnerability of European systems, another analyst said. "Because of Britain's intelligence-sharing relationship with America our systems have to be up to their standards in a way that some of the European systems don't," he explained.

Jonathan Evans, Director-General of MI5, warned in 2007 that several states were actively involved in large-scale cyber-attacks. Although he did not specify which states were involved, security officials have indicated that China now poses the gravest threat. Beijing has denied making such attacks.

Robert Mueller, FBI Director, has warned that, in addition to the danger of foreign states making cyber-attacks, al-Qaeda could in the future pose a similar threat. In a speech to a security conference last week, Mr. Mueller said terrorist groups had used the internet to recruit members and to plan attacks, but added: "Terrorists have shown a clear interest in pursuing hacking skills and they will either train their own recruits or hire outsiders with an eye towards combining physical attacks with cyber-attacks."

He said that a cyber-attack could have the same impact as a "well-placed bomb". Mr. Mueller also accused "nation-state hackers" of seeking out U.S. technology, intelligence, intellectual property and even military weapons and strategies.

To help to fight the growing threat, the Office of Cyber Security, set up last year as part of the Government's national security strategy, liaises with America's so-called cyber czar, Howard Schmidt, who was appointed by President Obama to protect sensitive government computers.

British officials said that everyone in sensitive jobs had been warned to be especially cautious about disseminating intelligence and other classified information. Whether British intelligence is involved in retaliatory attacks is never confirmed. However, officials said that there was a significant difference between being part of an information war and indulging in aggressive attacks to disrupt another country's computer systems.

Dr Lewis said that neither the U.S. nor any of its Western allies had formed an effective response to the Chinese threat, which has its origins in a massive boost to Chinese technology ordered by Deng Xiaoping, the late Chinese leader, in 1986.

The West's own cyber offensives have so far been directed largely at terrorists rather than nation states, giving China virtually free rein to penetrate Western systems with its own world-class hackers and increasingly popular Chinese-made components. "You almost have to admire them," Dr Lewis said. "They have been very consistent in their goals."

Senators Question Army Leadership On UAV Redundancies, Mi-17s

By Tony Bertuca

Inside the Army

March 8, 2010

Sen. Byron Dorgan (D-ND) is calling for answers on why the Army is procuring and fielding unmanned aerial vehicles similar to those of the Air Force. "I have wondered aloud and questioned why we have almost identical programs run by both the Army and the Air Force – Sky Warriors, the Warriors and the Predators," Dorgan said at a Senate Appropriations defense subcommittee hearing last week.

"As I watched the growth of the Predator and the Warrior program, it looked to me like you've got two branches of the service that have done exactly the same thing and I've been enormously frustrated by that," Dorgan said. "So the question is: How will the Army Sky Warrior UAVs integrate with the 50 Air Force UAV [combat air patrols] that are planned for 2011? Are you working with the Air Force?"

At the hearing, Army Chief of Staff Gen. George Casey acknowledged the potential redundancy but said he doesn't yet have an answer. "I asked myself the same question that you do: Is it so much different that it ought to be a different program?" he said. "And could we not gain efficiencies working with one program? And I have not cracked that with the Air Force yet."

But Casey stressed that the Army needs to maintain control of its own UAVs to easily move them based on changing tactical situations. He said, however, the service has worked with the Air Force to develop a concept of operations for core commanders.

"I think we've done a good job of differentiating that – probably not as much progress on the procurement side in differentiating that," Casey said. In response, Dorgan urged establishing a central authority focused on UAVs within the Defense Department.

"I have thought there should be an executive agency for UAVs in the Pentagon so that we don't have different levels of service doing the same thing and duplicating the research, duplicating the management of the program and so on," he said. "It is frustrating to see. I understand that most services want to do everything, even some things another service is doing. It's been a battle we've fought for 30 years – mostly unsuccessfully, I'm afraid."

At the same hearing, Sen. Richard Shelby (R-AL) expressed concern about the Army's procurement of nearly 50 Russian-made Mi-17 helicopters being used to equip national forces in Iraq, Afghanistan, and Pakistan. The Pentagon is also reviewing the program.

"I have expressed to the Secretary of Defense as well as to this committee my grave concerns regarding the use of U.S. taxpayer dollars for Mi-17s based on false assumptions, a total lack of requirements and no analysis of alternatives," Shelby said.

ITA has previously reported the Mi-17 procurement program has offices across the government developing their own requirements for the helicopters.

"The Army has been intimately involved with the procurement of these helicopters and, until I publicly stated my concerns last fall, it appeared that the Army was completely fine with funneling millions of dollars to the Russians to equip the Iraqis and Afghans based on nothing more than the fact that these militaries had once seen a Mi-17," Shelby said.

In addition, he said, Mi-17s have been found to have exceptionally high maintenance requirements for parts and services not readily available in the theater.

At the hearing, Army Secretary John McHugh said the Mi-17s were selected because many pilots in Iraq and Afghanistan were familiar with the Russian-made choppers and had previously flown them. However, Shelby pressed for an analysis of alternatives and a report on the program.

"Now that the Army has been designated as the lead service for the Mi-17 procurement and it has established a non-standard rotary wing program management office, why are there still no requirements or analysis of alternatives to this?" Shelby asked. "[The] 2010 defense appropriations bill requires a report detailing the current and anticipated demand for Mi-17s for Iraq, Afghanistan and Pakistan . . . within 60 days of enactment of the bill. That was 74 days ago, Mr. Secretary. Where are we here?"

McHugh said the Army is simply implementing DOD policy but will reexamine the program if it expands. He asked to speak to Shelby about the report at a later date. "This is a DOD-directed program," McHugh said. The Army has been "designated the lead agent and administrator on this, but that is to implement DOD policy. The procurement program is intended, as has been explained to me, to meet current and near-term needs on the battlefield."

However, "as a 'Buy American' kind of individual, I think it's totally appropriate as we go forward that we continue to assess the program," McHugh continued. "And at such time as it's appropriate, when perhaps the theater needs grow, we reexamine exactly which way . . . we should go in future platforms."

Expeditionary ethos
By Frank G. Hoffman
Armed Forces Journalist
March 2010

The geo-strategist Halford McKinder once divided major states between Land and Sea Wolves. States that have an expeditionary capability are not limited to either/or status. They crossbreed their wolf packs to swim if needed and conduct operations ashore far from home when called upon. This expeditionary capability allows a state to apply strategic leverage across the physical domains. Most critically, expeditionary capabilities allow powers to deal with or minimize geographical and environmental constraints. Expeditionary forces allow maritime powers the opportunity to exploit their mastery of the seas to their advantage. Equally important, expeditionary forces can help offset the disadvantages of a purely maritime-based approach and provide even Continental Elephants the ability to project power when their interests are served by that capability.

The confluence of three ongoing "pivots" will impact the frequency and amplitude of conflict in the coming decades. Demographics and the certain shift to the urbanized littorals of the globe is one pivot. Emergent powers, especially on the Eurasian heartland, are another. The growing demand for energy resources is the third. Our geostrategic future lies at the conjunction of these seemingly distinct shifts. MacKinder understood "the great wars of history ... are the outcome, direct or indirect, of the unequal growth of nations, and that unequal growth ... in large measure is the result of the uneven distribution of fertility and strategical opportunity upon the face of the globe."

The unequal growth today and the uneven distribution of opportunity present daunting prospects for peace in the coming age. Responding to these diminishing prospects for peace is further complicated by the range of threats we face. The evolving character of modern conflict poses challenges that range from Thomas Friedman's proverbial "super empowered individuals" to rising superpowers armed with nuclear weapons and the full panoply of advanced conventional capabilities.

It is a safe wager that war will always be with us. What is not a safe bet is the character and frequency of war. The causes, character and consequences of wars in the future will be influenced by many factors. Historical patterns and future trends point to shifts in the character and forms of warfare. Some of these shifts are captured by the interest in "new wars," net wars, and "n-th generation" warfare. Most of these frameworks reflect an interest in novelty, overlook enduring elements of conflict and are short on prescriptions. A myopic focus on purely conventional threats leads us to dismiss rising challenges and the confluence of modes of conflict that led to 9/11. These two extremes should be avoided when trying to determine how to best posture U.S. forces to cover an expanding threat and mission spectrum in the 21st century.

The evolving character of conflict can be described in terms of traditional, irregular and combination. Each form poses its own degree of difficulty and corresponding risk.

- Traditional challenges. The potential for major interstate warfare has been low, and will remain a rare but ever-present element in the international system. The fashionable presumption that interstate conflict is a thing of the past should be dashed with a clear understanding of history and human nature. "Over the past two centuries," Donald Kagan noted, "the only thing more common than predictions about the end of wars has been war itself."

The occurrence of traditional state-on-state warfare, featuring the use of national armies and high-end weapons, has declined statistically. But it remains a distinct possibility and must still be regarded as a dangerous and enduring threat. I emphatically disagree with John Mueller's idea about the obsolescence of major interstate conflict. Writing in the *World Affairs Journal*, he said that "war, as classically defined, may be in the process of becoming a matter mainly of historical interest." He may be confident in this bold assertion, but there is an awful lot of history supporting Colin Gray's conclusion that war is "a permanent feature of the human condition" that should not be ignored. Additionally, the expected proliferation of nuclear, chemical or biological weapons compels us to devote substantial resources to defense and to field forces that can operate in battlefields where an enemy's use of such weapons cannot be dismissed.

- Irregular challenges. It is recognized that our overwhelming conventional war-fighting capability induces others to explore and employ what we consider to be irregular methods and tactics. Our adversaries will likely employ a variety of means against us. Among them, terrorism, weapons of mass destruction, protracted irregular combat operations, and cyber subversion impose the greatest concern. Decentralized, self-reliant, innovative and networked groups will employ terrorism to threaten our interests at home and abroad.

The growing trend of violent, transnational extremism is today's most prevalent destabilization factor. The ability of small transnational groups to exploit the globe's modern infrastructure and disrupt the highly interdependent networks of finance, trade, communications, transportation and energy distribution cannot be underestimated.

Irregular wars cannot be ignored. It might be true, as Gray argues, that "mischief of irregular warfare pales into mere insignificance compared to the potential for harm that resides in great power antagonism." But the mischievous are getting tools and techniques that raise the stakes. The more we seek to overlook the messy and frustrating realities of so-called "irregular warfare," the more we are going to face this threat and pay a steep price for relearning old lessons.

- Combinations. The neat distinctions or intellectual bins we make between conventional and irregular warfare are useful, but only to a degree. The future portends potentially aggravating circumstances that will make the neat distinction between state and nonstate moot, and the delineation between conventional and irregular adversaries irrelevant. Thanks in part to globalization and the rapid transmission of ideas and technology, there is a recognizable fusion or blurring of regular and irregular modes of combat, into what might be called "combinational" or hybrid warfare.

Hybrid threats incorporate combinations of different modes of warfare including conventional capabilities, irregular tactics and formations, terrorist acts including indiscriminate violence and coercion, and criminal disorder. These multimodal operations display a novel degree of operational and tactical fusion in time and space. They may confound purely conventional approaches and kinetic solutions, and may also foil today's emphasis on population-centric counterinsurgency strategies.

Hence, the paradox facing us is that we must maintain the ability to wage successful campaigns against both large, conventionally armed states and their militaries, against widely dispersed terrorists, and everything in between — generally at great distance from our shores. Therefore, expeditionary warfare has a bright or at least active future. We must prepare for this broad range of operations including traditional interstate war and complex contingencies without extensive warning time or extended training. Thus, we must be smart about our force posture and lean toward the highly agile and multipurpose expeditionary force. We cannot be wedded to a particular way or mode of war — there will be no silver bullets or formulas for military success.

We should not delude ourselves that our interests can be secured by merely dominating the global commons far from or high above the heartland. Such dominance is a precondition to success, an enabling and critical function not to be confused with the means of securing those interests. For this we will need to dominate and maneuver within the contested zones, in the littorals and in the urbanized rim lands of those strategic areas where our interests are most at risk. This will require the ability to fight and when necessary slay our nation's enemies. Make no mistake about it.

As retired British Lt. Gen. John Kiszely so eloquently put it, our military forces must be prepared for "a kaleidoscope of different types of operation, remarkably resistant to neatness in delineation." We will be presented with problems that are intractable and circular with complex interdependences and where solving one part of the problem can lead to different problems, or make the whole problem greater. Thus the future augurs for a new expeditionary era and the development of expeditionary capabilities with some sense of urgency. This is not an expeditionary impulse, but an expeditionary imperative.

A number of shifts and implications can be deduced from the principal drivers and projected changes in the character of conflict. These shifts include:

- From a static posture of waiting at home for crises to erupt to a forward deployed or deployable expeditionary posture.
- From an emphasis on formal state allies to an ability to form fluid organizational arrangements and information-sharing practices with multiple partners.
- From this follows the need to shift from a military-centric model to more comprehensive approaches that are multi-agency enabled in order to bring in the appropriate skill sets.
- From wishing for open fields of green to expecting complex terrain to be the norm.
- From investing in mass/quantity/technology to quality and human factors, including language and cultural competence.
- From a myopic preoccupation with precision, spending billions to extort a few more centimeters of accuracy with a stand-off munition, to a keen degree of discrimination which emphasizes acumen and a wider range of lethal and nonmilitary capabilities.
- From an emphasis on attrition in the physical domain to effects that cut across all domains and incorporate the need to win the battle of the narrative, not just the tactical combats.
- From practicing combined arms with artillery and close-air support to combined actions that blend maneuver forces, stability resources, economic development and information activities.
- From just getting someplace fast via strategic speed for illusionary short wars to a greater degree of endurance and rotation base.
- From an American predisposition with stand-off warfare to close contact with our enemies who will frequently embed themselves among noncombatants.
- Clearly we no longer have the benefit of a hierarchal/rigid adversary and now must deal with Army Maj. Gen. Robert Scales' nontemplatable enemies.
- From an emphasis on training our muscles to education and preparing the officer corps for an age of uncertainty.
- From rigid linear operations to more fluid, nonlinear or distributed operations.
- From the proverbial "modern major general" to Gen. Charles Krulak's strategic corporals and small unit leaders.
- There are three of these shifts that deserve greater consideration, force posture, expeditionary partnering and the expeditionary mindset.

The most significant implication for modern military forces is force design and force posture. We cannot afford separate forces for distinct threat types, even with our economic base. We will not field a million-man land army, at least with an all-volunteer force. We need to obtain a balanced

force that serves to deal with the likelihood and character of future conflict as best as we can determine. This requires a degree of strategic prudence and open-eyed risk management. Force versatility and adaptability will be at a premium.

Strategic balance can be obtained in many ways. At the risk of being labeled orthodox, what seems to balance the strategic risk, with expected resources for force size and procurement, is an emphasis on mobile medium forces that are qualitatively improved for expeditionary service. These forces will have to be prepared to confront the likely irregular insurgent, the more complex and operationally challenging hybrid threats, and prevail against more conventional adversaries. They will have to possess some heavy shock power. They will not have the comfortable luxury of optimizing their structure, equipment and training regimen to a predictable opponent or battlespace. They cannot be prepared for just for conventional or irregular adversaries — they will face both, and sometimes they will do so simultaneously. They must be adaptable, strategically and operationally, to the conditions on the ground, without 12 months of preparation or perfect intelligence.

Strategic adaptability and aggregate utility are obtained by investments in forces postured for prompt expeditionary service across a fairly significant range of the conflict spectrum. Expeditionary forces, possessing both the maneuverist approach and the expeditionary mindset, posture our forces in such a way as to maximize their readiness for a widening range of missions, despite projected resource constraints.

Future operations will require participation from a greater number of partners. These partnerships cannot be sustained as "two tiered" relationships divided by those willing to fight and those not. A higher degree of interoperability at the operational level will have to be obtained between us and future allies. More importantly, the future will require a complementary mix of shared burdens for combat operations, and greater inputs on strategy and campaign design from partners. We need to eliminate the recriminating comments from Afghanistan where "I saw America fight" became the derisive moniker for ISAF.

Additionally, we also require common rules of engagement and a common Rule of Law (detainee management, interrogation, observance of international law) for future operations. The lack of common ground can degrade from the coalition's legitimacy and strategic effectiveness. A great opportunity exists for our partners in developing this operational code.

Another significant implication is the need for an expeditionary ethos or mindset. Many military organizations use the term "expeditionary" to describe themselves or to label distinct units. But the term "expeditionary" encompasses far more than a mission involving actions beyond one's borders, the official U.S. definition. Expeditionary is an institutional belief system that influences all aspects of organizing, training, and equipping to ensure a unit can deploy rapidly, arrive quickly and begin operating upon arrival.

It is also an institutional and military culture that does not look for too precise an artificial box around its mission set. Expeditionary forces are willing to "do windows" and are comfortable transitioning back and forth between violent action and humanitarian relief tasks. This flexibility has to be embedded and reinforced by personnel systems, training and the force design of an expeditionary force. Expeditionary forces must be imbued with the notion of doing more with less, of fighting and prevailing in an austere operational environment. They are prepared to use their own initiative and readily solve problems on their own with a minimum of guidance. They do not look for explicit instructions, formal doctrine, or tactical templates or checklists.

The future demands military forces that are agile and adaptive in approach to the unique conditions each conflict poses. Planners preparing forces for tomorrow cannot focus narrowly on only one threat or one kind of war. Gray has warned us against adopting narrow or preclusive

visions or doctrine about future warfare. This is wise advice. American planning over the last decade has too often been dominated by such visions or *idée fixe*. Defense Secretary Gates' courageous efforts in the Pentagon notwithstanding, there are enormous biases in our military-industrial-political complex to return to technological and illusory solutions for security problems. The ongoing fight over the secretary's efforts to shape tomorrow's forces during the Quadrennial Defense Review already makes that clear.

There are some who want to return to the good old days and focus on conventional forces, refusing to understand tomorrow's threats and the corresponding requirements for military force. There are some who believe that Iraq and Afghanistan represent a passing blip, and that massed formations of traditional arms between conventional powers should be our sole focus. Others imagine that we can elect to "refuse battle" against challenges we do square up for our preferred conventional fights. I do not think we have that option, but I do hope that U.S. policy is far more discriminate in response. However, a "strategy of conflict avoidance" would be a strategic mistake. Preparing for an age of asymmetric wars is neither folly nor a matter of choice — it is a strategic necessity.

Of course, "complex expeditionary warfare" implies a notion of complexity presumed to have been absent in the past, but one can look back three and half millennia when the Greeks fought against Troy and find the challenges no less complex. Homer's "Iliad" dramatizes the complex expeditionary circumstances faced by the Greeks.

The Greek expedition was no simple matter. The assembly of their swift black ships was not a simple task, and the navigator originally landed miles off target. Nothing new here to veterans from Gallipoli or Normandy. Landing and storming Troy's beaches and boggy plain was not easy. Likewise, sustaining the mission was a logistics nightmare.

Troy's dense battlements pose no less danger or challenge than the sprawling megacities of Asia or Africa today. Achilles' debasement of Prince Hector's corpse should be seen in terms of its influence on the population of Troy. This effective imagery cowed the defenders of the city's battlements and their families better than a posted video of a beheaded prisoner by al-Qaida. Clearly, the famous Trojan horse represents one of history's first examples of the cunning inherent to the expeditionary mindset.

Whether the warriors are wearing greaves and bronze helmets, or leather boots and Kevlar headgear, the complexity is always present. We can be sure that America's expeditionary warriors, our modern day Myrmidons, must be prepared to face these enduring challenges.

The Last QDR? What the Pentagon should learn from corporations about strategic planning

By Ionut C. Popescu
Armed Forces Journal
March 2010

As the Defense Department was getting ready for another one of its large-scale strategic planning drills, senior Washington analyst Anthony Cordesman offered a grim assessment of such past efforts: "If God really hates you, you may end up working on a Quadrennial Defense Review (QDR). ... You will waste two years on a document decoupled from a real world force plan, from an honest set of decisions about manpower or procurement, with no clear budget or Future Years Defense Plan, and with no metrics to measure or determine its success."

Even though the recently completed 2010 QDR has some potential to make a more meaningful contribution to U.S. national security than its predecessors, the overall utility of the current models of strategic planning inside the Pentagon remains highly problematic.

The rational design model that dominates much of defense planning inside the department represents the state-of-the-art of the strategic management literature of 50 years ago. The business world left this model behind decades ago as archaic and unresponsive to the real world. Therefore, its failures to produce successful strategies for today's defense challenges are not terribly surprising. It is high time for the Pentagon to profoundly reorganize the ways it conducts strategic planning, and the business world could once more be a source of inspiration. Even if defense strategy and business strategy are different in several obvious ways, the processes of strategy-making in all large organizations share certain important similarities. Above all, both Pentagon strategists and business strategists must operate in a complex and rapidly changing external environment, they face limited resources, need to overcome bureaucratic obstacles inherent in large organizations, and compete against a number of thinking adversaries who constantly attempt to foil their plans. Therefore, there are important insights that defense planners can consider from the ways in which the business world changed its practice of strategic planning in recent decades.

Much like corporate America in the 1960s and 1970s, the Defense Department's strategy-making process is conducted by large planning staffs operating in a highly bureaucratized structure. However, while U.S. businesses realized the limitations of the rational design planning model a few decades ago and subsequently adopted new forms of strategy-making, the Pentagon's planning process is still largely mired in the framework imposed by former Defense Secretary Robert McNamara 40 years ago. This framework, built around a top-down hierarchical structure, resisted subsequent efforts to improve the Pentagon's strategic planning capability because most such efforts, including the congressionally mandated QDR, failed to question some of the fundamental premises of this model. One of the foremost business theorists, Henry Mintzberg, identified three major fallacies of traditional planning in his highly influential book, "The Rise and Fall of Strategic Planning":

- The fallacy of predetermination — "[Planning assumes] the prediction of the environment through forecasting ... the unfolding of the strategy formation process on schedule, and the imposition of the resulting strategies on an acquiescent environment, again on schedule, with the organization stabilized to do so through programming."
- The fallacy of detachment — "The detachment of strategies from operations, and, as a result, of what is called strategic management from operational management," or more simply, the separation of strategy formulation from strategy implementation.
- The fallacy of formalization — "The fallacy that strategy formation can be formalized ... that innovation can be institutionalized."

Each of the three major criticisms raised by Mintzberg could be profitably applied to national security planning, as well. First, the predictive accuracy of forecasting documents such as the National Intelligence Council's Mapping the Future series or of the U.S. military's Joint Vision 20xx series is surely just as problematic as the long-term economic forecasts of the business world. Second, the strong separation of "planners" from "doers" (for example, in the area of weapons procurement) often leads to a mismatch between future "strategic investments" and present real-world needs, a phenomenon captured by Defense Secretary Robert Gates in the term "next-war-itis." The Pentagon must surely worry about distant threats as well as current ones, but the fact that professional planning staffs conduct "long-term strategic thinking" tends to lead to an overemphasis on preparing for the kinds of wars we would like to fight rather than the ones we are most likely to enter. Lastly, history shows that the large-scale formal strategic reviews conducted by the U.S. government rarely produce innovative ideas. At best, their role has been to officially formalize a strategic concept already present in the public debate, and, at worst, to create a vacuous document that failed to have any meaningful impact on future strategic decisions.

GROUND-UP VISION

Even more fundamental than these three fallacies, business strategists realized that many successful strategies are formed through an emergent process of organizational learning from the experiences of the "guys on the ground" rather than from the efficient implementation of detailed plans laid out beforehand. The same cannot be said for most national security experts, whose efforts are often aimed merely at advancing structural or bureaucratic reforms that would allow senior leaders to implement their strategic plans more effectively. The idea that the "right" long-term strategy is something that can be "discovered" through extensive analysis by senior-level planners, and then implemented throughout the organization, is something that modern business theorists understood to be an illusory vision of how successful strategic planning takes place in the real world. It is time for Pentagon leaders to incorporate this insight, as well, and to shift the strategy-making process from one based on deliberate, formal planning to one that encourages emergent learning.

In recent years, there were a few hopeful signs that such a shift may be underway in some parts of the military. One recent example of the U.S. military conducting successful emergent planning is the evolution of the surge strategy in Iraq. Some important elements of this strategy have been the result of a bottom-up process of learning from the experience of leaders on the ground, rather than from top-down directives. Cols. H.R. McMaster in Tal Afar and Sean McFarland in Anbar province showed the importance of providing security for the population and, respectively, of making deals with Sunni sheiks and the future members of the Sons of Iraq, two crucial components of the "surge" approach that became the official U.S. strategy after Gen. David Petraeus assumed command in Iraq. More broadly, the successful adoption of the counterinsurgency (COIN) doctrine as a core component of America's grand strategy in the war on terrorism has been an evolving process heavily influenced by the bottom-up lessons from Iraq and Afghanistan, rather than the product of a formal strategic review.

Unfortunately, even though the U.S. military improved its ability to develop emergent strategies in recent years, particularly when it comes to dealing with tactical and operational challenges, the Pentagon's formal strategic planning process remains grounded in the outdated premises of the rational design model. Despite its repeated manifest failures in achieving the integration of strategy, programs and budgets, the Planning, Programming and Budgeting System (PPBS), a holdover of the McNamara era, continues to represent the management approach used to build up defense budgets. Similarly, the QDR exercises, another attempt to "make strategy" through a top-down rational design model, have been so overtaken by the bureaucratic rivalries among the military services that they served little strategic purpose once they were finalized. Despite the frustration with this traditional form of planning, both among civilian and military participants, the Defense Department at an institutional level has not yet found a way to adapt its strategic planning mechanisms to meet the demands of today's rapidly changing external environment.

To better understand the evolution of corporate strategic planning, and consequently how we can apply lessons from this arena to national security planning, it is worthwhile to offer a very brief account of how the debate on this topic unfolded in the business world. The disappointing results of the traditional model of strategic planning led legendary General Electric CEO Jack Welch to begin his famed transformation of the company by making major reductions in the burdensome formal strategic planning mechanisms that were in place in the early 1980s. Over the next several decades, other leading corporations such as Intel, Honda, Royal Dutch/Shell Group, Exxon and Google followed highly successful strategies that had little to do with large-scale strategic planning exercises similar to the QDR. The stories of these companies' successes, and of their innovative planning practices, could be profitably mined for insights by the government's strategic and defense planners.

The turbulent business environment of the 1970s made long-term forecasting very challenging, and hence corporate strategists shifted their focus from long-term "corporate planning" to "strategic management" and the search for competitive strategies that could best maximize the internal resources of the firm. According to one of the most eloquent advocates of this concept,

Harvard's Michael Porter, "Competitive Strategy is about being different. It means deliberately choosing a different set of activities to deliver a unique mix of value."

This focus on "competitive strategy" has been advocated in the debates on U.S. defense strategy by Andrew Marshall, Barry Watts and Andrew Krepinevich, among others, who have urged the U.S. military to focus on creating and exploiting asymmetrical advantages as the key to successful strategy-making. While these authors' have been remarkable in their attempt to shift the focus away from the 1950s and 1960s traditional model of planning, recent developments in the business literature in the past decade have now moved away from this emphasis on competitive advantage (prevalent in the 1980s and 1990s) to an emphasis on strategic innovation and planned emergence.

The "learning model" of emergent strategy formation is based on Mintzberg's premise that the "complex and unpredictable nature of the organization's environment, often coupled with the diffusion of knowledge bases necessary for strategy, precludes deliberate control; strategy making must above all take the form of a process of learning over time, in which, at the limit, formulation and implementation become indistinguishable."

The learning school does not deny the importance of certain elements of deliberate planning: As Mintzberg says, "all real strategic behavior has to combine deliberate control with emergent learning." Most successful real-world strategies are neither purely deliberate, nor are they purely emergent. However, unlike the design school's focus on detailed strategic planning exercises, and then on implementing the strategies resulting from such planning, the learning school has a different role for strategists. Deliberate planning should focus on managing the process of strategic learning. The strategist's role is to create the conditions for a process of "planned emergence," i.e. to provide a general guiding perspective, and then to recognize the successful strategic innovations coming from the bottom up and adopt them at the level of the entire organization. As Nassim Taleb writes in "The Black Swan," "Contrary to social-science wisdom, almost no discovery, no technologies of note, came from design and planning — they were just Black Swans. The strategy for the discoverers and entrepreneurs is to rely less on top-down planning and focus on maximum tinkering and recognizing opportunities when they present themselves."

The empirical record accumulated in the business literature over several decades offers some significant support to the "learning school"; in-depth studies of several large companies have confirmed the importance of emergent processes in strategy formation. The success of Honda in the U.S. motorcycle market was initially regarded as the result of a carefully planned formal strategy, but later scholars showed that Honda's success in fact had little to do with initial planning and much more to do with flexibility, adaptation and good fortune. More recently, Robert Grant analyzed the strategic planning processes of the major oil companies in the turbulent markets of the past few decades, and found a process of "planned emergence." The oil industry has been the source of major innovation in strategic planning in the aftermath of Royal Dutch/Shell Group's famed use of "scenario planning," as opposed to forecasting, as the principal tool to prepare for the future by virtue of a process of organizational learning. Grant found that the "oil majors" continue to innovate successfully in the area of strategic planning, and that their approach aptly combined design elements with emergent processes: "Although hierarchical in structure with decision-making power ultimately vested in the top management team and critical inputs provided by corporate planning staff, the major oil companies' strategic planning systems in the late 1990s had little in common with the highly bureaucratized, top-down processes caricatured by Henry Mintzberg. In particular, strategic planning was primarily a bottom-up process in which corporate management provided direction, but primary inputs came from the business units and operating divisions. However, consistent with the process view of strategy formation, it was clear that the strategies of the oil majors were not created by their strategic planning systems."

Undersecretary of Defense Michèle Flournoy, the head of the Pentagon team that prepared the 2010 QDR, identified "increasingly prevalent hybrid forms of warfare" as one of the critical elements that will impact "how we need to shape our forces now and in the future." The greatest challenges of dealing with emerging hybrid forms of warfare, she argued, is that the U.S. military is being pulled in two very different directions: "On the one hand, we must be ready for irregular forms of warfare, warfare among the people, as some of the academics say, in which non-state actors use tactics like [improvised explosive devices], like suicide bombings, mixing in with the population, mixing non-combatants and combatants and so forth. ... On the other hand, we also have to prepare for what I would call high-end asymmetric threats where rising regional powers and rogue states can use highly sophisticated technologies to deny us access or deny us the ability to use some of our advantages. Here I'm thinking of sophisticated anti-satellite capabilities, anti-air capabilities, anti-ship weapons, undersea warfare, as well as weapons of mass destruction and cyber attacks."

In a traditional form of defense planning, such as the QDR, the strategic adaptation, flexibility and innovation needed to address the two intricate sets of challenges described above is constrained by the power given to the institutional forces that oppose changing the current status quo. Political scientists who study the inner workings of large bureaucracies highlighted for a long time the many problems associated with attempts at implementing strategic change from above: logrolling, "paralysis by analysis," settling for the least common denominator and foot-dragging are only some of the many obstacles to innovation. Rather than encouraging strategic adaptation and innovation, traditional planning reviews usually end up as bureaucratic slugfests with parochial interests dominating the debate. The structure of the QDR process further harms the search for a strategy tailored to real-world needs by pushing important parts of the military to worry more about protecting their favorite weapons systems rather than looking for innovative solutions to today's challenges.

The way that successful companies such as General Electric adapted to the internal challenges of a sclerotic bureaucracy and the external challenges of facing a fragmented and rapidly changing competitive environment was to decentralize the strategy-making process and emphasize bottom-up emergent learning rather than top-down deliberate planning. The current and future security challenges posed by "hybrid wars" appear particularly well-suited to be addressed by emergent strategies rather than by traditional deliberate ones.

Military analyst Frank Hoffman, one of the foremost experts on hybrid threats, underscores the complexity and unpredictability of this type of warfare: "Future threats can be increasingly characterized by a hybrid blend of traditional and irregular tactics, decentralized planning and execution, and nonstate actors, using both simple and sophisticated technologies in innovative ways. ... We do not face a widening number of distinct challenges but rather their convergence."

Therefore, one of the essential attributes of contemporary strategic planning must be the ability to remain nimble and adaptive. The nature of the current security environment is such that not even the most brilliant of today's Pentagon planners are likely to come up with a long-term strategy that would not become obsolete in less than a decade. A strategy is needed nevertheless, and the "learning model" of emergent strategy formation provides one of the most useful frameworks that could guide the Pentagon's strategic planning process.

Ionut C. Popescu is a PhD candidate in international relations at Duke University in North Carolina, where he studies the formation of American grand strategy and the connections between strategic planning in the business world and in the U.S. government.