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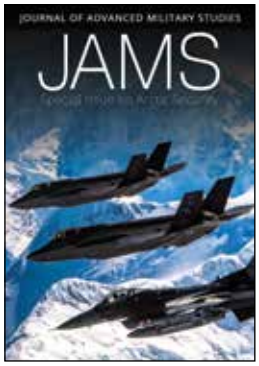

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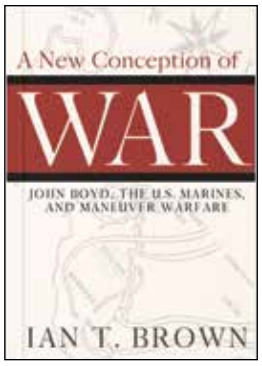
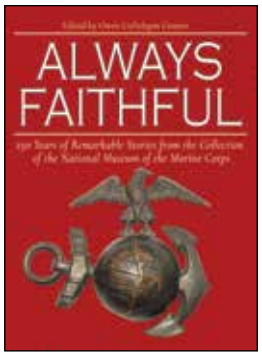


A New Conception of War: John Boyd, the U.S. Marines, and Maneuver Warfare by Ian T. Brown



Always Faithful: 250 Years of Remarkable Stories from the Collection of the National Museum of the Marine Corps Edited by Owen Linlithgow Conner

FROM THE EDITORS

Every so often, the idea that the United States does not actually need a Marine Corps begins to circulate. Discussions of dissolving the U.S. Marine Corps or of absorbing it into another Service are often based on this idea. And just as often, the iconic statement of Lieutenant General Victor H. Krulak in response to an inquiry by then-Commandant General Randolph Pate (1 January 1956–31 December 1959), proved to hold true: "In terms of cold mechanical logic, the United States does not *need* a Marine Corps. However, for good reasons which completely transcend cold logic, the United States *wants* a Marine Corps."

Taken on its own, it is a strong and confident statement that appeals to the Corps' core values, martial pride, and sense of tradition, and it is often accepted at face value. Krulak prefaced it, however, by detailing a set of ideals that created the conditions under which his statement had held true:

> We exist today—we flourish today—not because of what *we* know we can do, but because of what the grassroots of our country *believes* we are and *believes* we can do. . . . Essentially, as a result of the unfailing conduct of our Corps over the years, they believe three things about the Marines. First, they believe that when trouble comes to our country, there will be Marines—somewhere—who, through hard work, have made and kept themselves ready to do something useful about it, and do it *at once*. . . . Second, they believe that when the Marines go to war they invariably turn in a performance that is dramatically and decisively successful—not most of the time, but always. Their faith and their convictions in this regard are almost mystical. The mere association of the word "Marines" with a crisis is an automatic source of encouragement and confidence everywhere. The third thing they believe about the Marines is that our Corps is downright good for the manhood of our country; that the Marines are masters of a form of unfailing alchemy which converts unoriented youths into proud, self-reliant stable citizens—citizens into whose hands the nation's affairs may safely be entrusted.

The people believe these three things. They believe them deeply and honestly—to the extent that they want the Marines around—in either peace or war. They want them so much that they are ready to pay for them—and to fight for them too, if need be. . . . Still, in terms of cold mechanical logic, the United States does not *need* a Marine Corps. However, for good rea-

> sons which completely transcend cold logic, the United States *wants* a Marine Corps. Those reasons are strong, they are honest, they are deep rooted, and they are above question or criticism. So long as they exist—so long as the people are convinced that we can really do the three things I have mentioned—we are going to *have* a Marine Corps. I feel that is a certainty. And, likewise, should the people ever lose that conviction—as a result of our failure to meet their high—almost spiritual—standards, the Marine Corps will then quickly disappear.[1]

The key to Krulak's statement is the belief of the American people in the Marine Corps' inherent qualities and value. That belief has been fairly consistent, even when the Corps has fallen short on any one of the above ideals. As long as the people believe that, on balance, all these things are true, Krulak says, they will continue believing there is value in having a Marine Corps.

Throughout its 250-year history, usually in the face of congressional cost cutting, the Corps has had to justify its existence as a separate Service with a distinct mission and set of skills, repeatedly reinventing itself to prove its continued relevance and meet new threats. In 2025, evolving international contests appear to present the most complex challenges yet, while social and political unrest within U.S. borders raise questions about whether deploying Marines at home for policing operations surrounding domestic protests meets the legal standard under the Posse Comitatus Act. The Corps is deep in the process of reorienting to its new strategic priorities. As its current leaders work toward adapting the Corps to address future potential conflicts from the Indo-Pacific to the Arctic, all while maintaining its independence, they also must attend to the Corps' ability to deliver on the three ideals Krulak noted, upholding the American public's trust. To that end, closely studying the history of the Marine Corps becomes ever more relevant. Historical events and conflicts continue to echo through time and their influences will be felt far into the future.

Sometimes examining one's own history includes learning about the lives and experiences of opponents on the battlefield. In "His Knightly Honor Proved: Lieutenant Colonel Josef Bischoff, Imperial German Army," Colonel William Anderson, USMCR (Ret), offers a biography of the only German tactical leader at Belleau Wood who is mentioned by name in various accounts of the battle. Bischoff was an influential figure on and off the battlefield. Anderson's article analyzes how his late nineteenth-century military training and leadership experiences shaped Bischoff into the formidable enemy leader who defended the *461st Infantry Regiment*'s position at Belleau Wood against American forces.

In "Missed Opportunities: Kennedy, the Marine Corps, and Counterinsurgency, 1961–63," Dr. Nathan R. Packard examines the U.S. Marine Corps' response to President John F. Kennedy's pledge to counter Communist inroads in the developing world and attempts to reconcile competing historiographic interpretations of the Marine Corps' response to counterinsurgency. Some historians have argued that the Marine Corps' small wars heritage and innovative streak made it uniquely suited for counterinsurgency-type missions while others contend that the Marine Corps resisted counterinsurgency during the Kennedy era. Clarifying the relationship between Kennedy, the Marine Corps, and counterinsurgency illuminates U.S. civil-military relations during a pivotal period of the Cold War.

This year—15–26 September 2025—marks the 75th anniversary of the Battle of Inchon and Operation Chromite during the Korean War. While risky, the 15 September 1950 landing of American forces at the port city of Inchon, just southwest of Seoul, changed the course of the war. As Americans and Koreans commemorate the war, Dr. Cord A. Scott's "In-

[1] Gen Victor H. Krulak, *First to Fight: An Inside View of the U.S. Marine Corps* (Annapolis, MD: Naval Institute Press, 1984), xiv–xv.

chon: A Guide to the Markers and History" surveys the history of the Inchon landing, analyzes some of the landing sites and planning, and explores associated markers and museums.

Dr. Sarah E. Patterson's historiographical essay, "Operation Iceberg: A Brief Historiography of World War II's Battle of Okinawa, 1 April–22 June 1945," evaluates the written accounts of the often overlooked Battle of Okinawa, including published and unpublished primary sources, and discusses a few of the most frequent debates about the battle. Patterson also identifies some areas of the battle's history that would benefit from more research, such as English-language translations of Japanese soldiers' experiences during the battle and of the effects of the battle on the people of Okinawa.

The summer issue closes with several book reviews focusing on a variety of military history subjects to guide readers toward new and valuable resources. As always, the editors are eager to receive article submissions from those whose passion and expertise make the history of the Marine Corps available and accessible to readers, including submissions of historiographical essays examining the extant sources on the Marine Corps' history and the shape of scholarly debate on specific events or actions or on broader general history topics. We look forward to hearing your thoughts on these topics and to your future participation as an author, reviewer, or reader. Junior faculty and advanced graduate students are encouraged to submit articles and book reviews, as well. Join the conversation and find us online on our LinkedIn page (https://tinyurl.com/y380xnp5), at MC UPress on Facebook, MC_UPress on Twitter, and MCUPress on Instagram, or contact us via email at MCU_Press@usmcu.edu for article submission requirements and issue deadlines.

Happy 250th anniversary, and semper fidelis!

•1775•

His Knightly Honor Proved

LIEUTENANT COLONEL JOSEF BISCHOFF, IMPERIAL GERMAN ARMY

By Colonel William Anderson, U.S. Marine Corps Reserve (Ret)

Abstract: One of the U.S. Marine Corps' most resourceful opponents in World War I has received curiously little attention in historical accounts: Major Josef Bischoff, commander of the *461st Infantry Regiment*, who led German forces against Marines at Belleau Wood. This article offers a much-needed biography of the only German tactical leader at Belleau Wood mentioned by name in various accounts of the battle.
Keywords: Major Josef Bischoff, *461st Infantry Regiment*, Battle of Belleau Wood, World War I

Since its inception in 1775, the U.S. Marine Corps has battled many enemies. These opponents have varied in skills and tactics, from the rural Nicaraguan nationalist bandit César Augusto Sandino to professional soldiers such as Japanese General Tadamichi Kuribayashi. Each time, Marines were faced with overcoming significant obstacles that were the direct result of the effective use of tactics and terrain by enemy leaders. While much has been written about some of these well-known opponents, one particularly resourceful enemy commander has received little recognition. This is more remarkable when you consider that various accounts of the Battle of Belleau Wood mention only one German tactical leader by name: Major Josef Bischoff, commander of the *461st Infantry Regiment*. Little is known about the commander who defended Belleau Wood for most of the month of June 1918, and yet he was a remarkable figure whose influence spanned military and political spheres. This article attempts to provide a much-needed biography of Bischoff.

The effectiveness of Bischoff's tactical disposition at Belleau Wood can be gleaned from two semiofficial accounts of the war that contain references to him and his masterful defense. Colonel John Thomason's 1928 authoritative classic on the U.S. Army's 2d Division at Château Thierry, based on his research in the German archives, provides a unique vignette of Major Bischoff. According to Thomason, Bischoff was "an old West African soldier, who had learned the art of bush-fighting in the German colonies. His infantry positions were everywhere stiffened by machine guns and *minenwerfers* [mortars], and his dispositions took full advantage of the great natural defensive strength of the woods."[1]

An unofficial 2d Division history published by the Second Division Association in 1937 notes: "[The *461st Infantry Regiment*'s] commander was Major Bischoff,

Col William Anderson (Ret) spent the last portion of his military and civilian career in Europe with U.S. Marine Corps Forces Europe and Africa headquarters and with the North Atlantic Treaty Organization at the Supreme Headquarters Allied Powers Europe (SHAPE). A former defense contractor at Marine Corps Base Quantico, VA, and published Marine Corps historian, he was an adjunct faculty member at the Marine Corps Command and Staff College Distance Education Program from 2009 to 2017. For translation assistance, the author is indebted to Ms. Vivian Sims, former translator for the Office of the German National Military Representative, SHAPE, Belgium; LtCol Helmut Theissen (Ret), former German Army liaison officer, Marine Corps Combat Development Command, Quantico, VA; Dr. Marcel Rotter, associate professor of German, Mary Washington University; doctoral candidate J. B. Potter, associate professor of German, Hampden-Sydney College; Ms. Katarina van Bruggen; and the online use of DeepL translator. Research assistance in Germany was provided by Mr. Benjamin Haas, Dr. David Hamann, and Mr. Christian Petschko.
https://doi.org/10.35318/mch.2025110101

[1] John W. Thomason Jr., *The United States Army Second Division Northwest of Chateau Thierry in World War I*, ed. George B. Clark (Jefferson, NC: McFarland, 2006), 96.

an old colonial soldier who had seen much tough fighting in Africa."[2] Later, the history comments on the effect of the German defense on Major Berton W. Sibley's 3d Battalion, 6th Marines, on 8 June 1918: "Major Bischoff's machine guns were skillfully placed, and as soon as one was taken another took the captor in flank."[3] His accomplishments at Belleau Wood were the result of a lifetime of soldiering that shaped him into a formidable opponent.

Josef Maximillian Johan Bischoff was born on 14 July 1872 at Langenbrück, Upper Silesia, Prussia (now Poland). His parents were Joseph Bischoff (1833–1910), a prominent mill owner, and Agnes Saluz (1846–1912).[4] With the Bischoff family being affluent, Josef Bischoff was able to receive an officer candidate appointment in the Prussian Army and joined the *Infantry Regiment Keith (1st Upper Silesian) No. 22* in Silesia in January 1892.[5] He received a commission as a second lieutenant on 16 March 1893.[6]

On 9 March 1898, he joined the *Schutztruppe* or Imperial Protectorate Force in German East Africa. The *Schutztruppe* were the colonial armed forces of the German Empire and was made up of German officers and noncommissioned officers with local recruits.[7] The officers selected for service in the *Schutztruppe* were considered the cream of those eligible.[8] This overseas force earned a remarkable but notorious reputation during years of continuous colonial warfare from 1889 to 1911. To their credit, they were able to take the local recruits and create "soldiers who were respected and feared far beyond the boundaries of the colony."[9]

With the valuable experience gained in East Africa, Lieutenant Bischoff returned to Germany on 16 June 1901.[10] He then returned to Africa in March 1904 when members of his unit, the *3d Company, 22d Infantry Regiment*, were transferred to German Southwest Africa (now Namibia) for service in the infamous German-Herero conflict. He served as the adjutant, *2d Battalion, 1st Field Regiment*.[11] During the summer campaign, he was wounded in the left foot during a skirmish at Omatupa village in the Omuramba region on 15 August while providing his commander, Major Herman von der Heyde, key information during the battle that may have saved the major's life.[12] For his quick thinking and initiative under fire, traits that would serve him well in the next war, First Lieutenant Bischoff was awarded the Order of the Red Eagle 4th Class, with swords, on 30 July 1906.[13] The regimental history recounting this award notes that Bischoff had been awarded previously the Royal Order of the Crown, 4th Class, with swords.[14] The circumstances

[2] Oliver L. Spaulding and John W. Wright, *The Second Division, American Expeditionary Force in France, 1917–1919* (New York: Hillman Press for Second Division Association, 1937; Nashville, TN: Battery Press, 1989), 53.
[3] Spaulding and Wright, *The Second Division, American Expeditionary Force in France, 1917–1919*, 56.
[4] Karl-Fredrich Hildebrand and Christian Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg* [Knights of the Order Pour le Mérite of the First World War], vol. 2, bk. 1 (Osnabrück: Biblio Verlag, 1999), 118.
[5] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:119.
[6] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:119.
[7] Ernst Nigmann, *The Imperial Protectorate Force, German East Africa, 1889–1911*, trans. Robert E. Dohrenwend (Nashville, TN: Battery Press, 2005), 267.
[8] Nigmann, *The Imperial Protectorate Force, German East Africa, 1889–1911*, 181.
[9] Nigmann, *The Imperial Protectorate Force, German East Africa, 1889–1911*, 181.
[10] Nigmann, *The Imperial Protectorate Force, German East Africa, 1889–1911*, 267.
[11] Kriegsgeschichtlichen Abteilung I des Großen Generalstabes, *Die Kämpfe der Deutschen Truppen in Sütwest-afrika*, vol. 1, *Der Feldzug gegen die Hereros* (Berlin: Ernst Siegfried Mittler und Sohn, 1906), 218.
[12] *Die Kämpfe der Deutschen Truppen in Sütwest-afrika*, vol. 1, 236. Left foot wound mentioned in undated medical note at German Federal Archives, Reich Finance Ministry, BArch, R 43-I/2725, PDF Doc. 3841.
[13] Kolonial-Abteilung des Auswärtigen Amts, *Deutsches Kolonialblatt 1906: Amtsblatt für die Schutzgebiete in Afrika und in der Südsee*, vol. 17 (Berlin: Verlag von Ernst Siegfried Mittler und Sohn, 1906), 544. The Order of the Red Eagle (German: *Roter Adlerorden*) was another Prussian award for excellence, next higher in order than the Royal Order of the Crown. The designation "with swords" also recognizes exemplary conduct in combat. William E. Hamelman, *Of Red Eagles and Royal Crowns* (Dallas, TX: Matthaus Publishers, 1978), 54. See also "Decorations: Order of the Red Eagle—Roter Adlerorden," World War I—The Officers, Uboat.net, accessed 1 July 2015.
[14] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 119, indicates he was awarded the Order of the Crown and the regimental history states, "Lieutenant Bischoff, who had already been honored with the Royal Order 4th class with swords, took part in the battle on 15 August [1904]." Hans Guhr, *Geschichte des Infanterie-Regiments Keith 1. Oberschlesisches Nr. 22 1813–1913* (Katowice, PL: Phönix-Verlag, 1913), 288. Translation assistance from Mr. J. B. Potter. The Royal Order of the Crown (German: Kronenorden) was Prussia's lowest ranking order of chivalry and fourth in line for Prussian Orders, honor awards, and campaign/commemorative medals. The designation *with swords* recognizes exemplary conduct in combat. Hamelman, *Of Red Eagles and Royal*

of that award are unknown. As noted in the *22d Regiment*'s history:

> When he saw how his commander was in a spot that was especially exposed to enemy bullets, Bischoff took it as his duty to hurry to him and make him aware of the danger. Major von der Heyde subsequently changed his position. Because Lieutenant Bischoff still found himself in the old precarious spot, an enemy bullet struck him in the right foot, which incapacitated him for action for a long time. Thus, through his vigilance and boldness, he saved his commander from being wounded, perhaps even from a sure death; unfortunately, however, he had to pay for his bravery with a serious wound, from which he thankfully recovered after months of recovery. Near the end of the campaign, he received the Order of the Red Eagle 4th Class with swords.[15]

After convalescence, Bischoff returned to duty during the Hottentot Uprising and eventually served as a troop leader during the Nama War in 1906.[16] The Herero and Nama Wars are known today as examples of brutal colonial repression and ethnic cleansing amounting to extermination.[17]

Returning to Germany in January 1909, Bischoff became a company commander in the *112th Infantry Regiment* effective 1 February.[18] In 1911, he became a company commander in the *166th (Hessen-Homburg) Infantry Regiment*. Bischoff was promoted to major on 1 October 1913.[19]

As the European nations plunged into war in 1914, many German career soldiers were selected to serve in reserve infantry regiments.[20] Bischoff was appointed to command the *III Battalion, 60th Reserve Infantry Regiment*, at its mobilization on 2 August.[21] This was a common occurrence in the German Army in 1914 by which career officers and noncommissioned officers were assigned to reserve units to facilitate the reservists' transition to active service.[22] Composed of reservists equally from the Rhineland and Alsace-Lorraine, the *60th Reserve Infantry Regiment* was part originally of the *60th Bavarian Reserve Infantry Brigade*, *30th Bavarian Reserve Infantry Division*, *XIV Reserve Corps*, *Seventh Army*, serving as part of the Strasburg Garrison in border defense on the eastern frontier between France and Germany.[23] That assignment changed with the successful French attack through the Vosges region on 14 August 1914, forcing a German withdrawal.

On 17 August, the *60th Reserve Infantry Regiment* began its preparation for the Battle of Lorraine in the rugged forested Vosges region of eastern France. As noted in *American Armies and Battlefields in Europe*:

> The rugged terrain in the Vosges Mountains, north of the Swiss border, was a serious obstacle to major opera-

Crowns, 54. See also "Medals," Uniform and Insignia Details, GermanColonialUniforms.co.uk, accessed 1 July 2015.

[15] Guhr, *Geschichte des Infanterie-Regiments Keith 1. Oberschlesisches Nr. 22 1813–1913*, 288–89.

[16] Kriegsgeschichtlichen Abteilung I des Großen Generalstabes, *Die Kämpfe der Deutschen Truppen in Südwestafrika*, booklet 1, *Ausbruch des Herero-Aufstandes* (Berlin: Ernst Siegfired Mittler und Sohn, 1906), 304; and Hanns Möller, *Geschicte der Ritte des Ordens "pour le mérite" im Weltkrieg* (Berlin: Verlag Bernard & Graefe, 1935), 95.

[17] Mark Cocker, *Rivers of Blood, Rivers of Gold* (New York: Grove Press, 1998), 340–41.

[18] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:119; and "4 Badiches Infanterie-Regiment Prinz Wilhelm Nr. 112," *Militärisches Wochenblatt*, no. 13 (1909): 284, Germany, Military, and Marine Weekly Publications, 1816–1942, Ancestry.com, accessed 10 May 2020. The *Militärisches Wochenblatt* (*Military Weekly*) began as a publication for the Prussian Army and later served as a national publication for the German Imperial Army. This military periodical served to both inform and educate members of the German armed forces as an official military journal printing army and wartime news; notices of appointments, promotions, awards, retirements, deaths, and the like; and articles on tactics, history, organization, combat, weaponry, and other topics of interest.

[19] "4 Badiches Infanterie-Regiment Prinz Wilhelm Nr. 112," 284.

[20] Karl Deuringer, *The First Battle of the First World War–Alsace-Lorraine* (Brimscombe Port, UK: History Press, 2014), 20.

[21] The German military used Roman numerals to designate battalions. MajGen Frederich Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg* [The 60th Reserve Infantry Regiment in the World War] (Oldenberg: Berlin, 1926), 12. Translation assistance from LtCol Helmut Theissen, German Army (Ret).

[22] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 12; and Dennis Showalter, *Instrument of War: The German Army, 1914–18* (Oxford, UK: Osprey Publishing, 2016), 42.

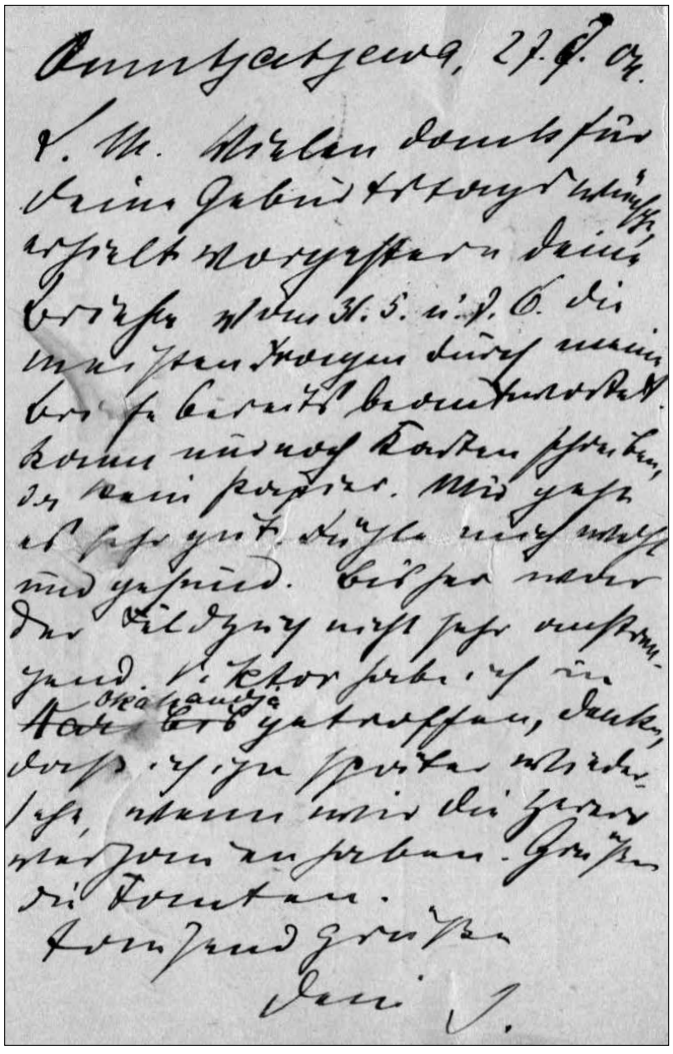
[23] Hermann Cron, *Imperial German Army, 1914–1918* (Solihull, UK: Helion, 2001), 327.

> tions in that region because of the difficulty of maneuvering and supplying any considerable number of troops during an advance. South of these mountains near the town of Belfort . . . the narrowness of the pass between the mountains and the Swiss border, called the Belfort Gap, made the region not suitable for large-scale operations.[24]

There were many lessons to be learned as German second- and third-line troops untutored in mountain warfare were challenged by well-prepared and experienced French mountain troops. Lacking high trajectory artillery guns needed for successful operations in the region, the German forces were initially at a distinct disadvantage.[25] They continued to struggle until sufficient artillery units arrived to support the infantry. In the meantime, Bischoff surely honed his skills at small unit tactics with the emphasis on command and control and persistence in the harsh environment. The lessons he learned here would pay off when he met the Americans in the rugged terrain of Belleau Wood in June 1918.

For the next two weeks, the regiment deployed to several locations as part of the general German counterattack. Having deployed to an area known as the Casino Heights near Schellstadt (now Sélestat), Bischoff and *III Battalion*'s baptism of fire was quick and severe.[26] On 15 August, the battalion received a heavy artillery barrage causing the entire unit to withdraw. The German *Sixth Army* in coordination with the *Seventh Army* finally responded to the French attack by commencing their counterattack on 18 August, which began the Battle of Lothringen (18–25 August 1914), driving the French forces back.[27]

On 19 August, the *III Battalion* was directed to positions on the Dangolsheimer Ridge, where it stayed



Courtesy of personal collection of George Malick, San Jose, Costa Rica
A postcard (front and back) Bischoff wrote to his mother, sent 27 July 1904, from Okahandja, Namibia, thanking her for birthday wishes, telling her he was doing fine, and that he was happy.

[24] *American Armies and Battlefields in Europe: A History, Guide, and Reference Book* (Washington, DC: American Battle Monuments Commission, Government Printing Office, 1938), 419.
[25] Cron, *Imperial Germany Army, 1914–1918*, 137.
[26] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 14–15.
[27] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 15.

MajGen Frederich Zechlin, Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg *[The 60th Reserve Infantry Regiment in the World War] (Oldenberg: Berlin, 1926), 63*

Officers of the *Reserve Infantry Regiment 60*, 1915.

until 22 August.[28] From its subsequent position at Sulzbad, east of Strasbourg, Bischoff's battalion was sent to support the *42 Infantry Brigade* in the mountainous region of Schirmeck. After arriving, it relieved a battalion from the *120th Infantry Regiment* and "cleaned the battlefield." This unfortunate and unpleasant task involved the burial of 161 of their countrymen and 388 French soldiers.[29] On 26 August 1914, the *60th Reserve Infantry Regiment* was sent to Château-Salins by rail to join the *Landwehr Infantry Regiment 82* forming the new *10th Bavarian Reserve Infantry Brigade* (to be known as *Brigade Ipfelkofer)*.[30] By 28 August, the brigade composition was completed and it was placed under the operational control of the *30th Bavarian Reserve Infantry Division* commander.[31]

For the next week, the regiment took advantage of being relieved from the front and engaged in battalion and regimental exercises.[32] During the period of 6–10 September, the regiment in Lanfroicourt provided support for a *XIV Reserve Corps* attack by conducting probing reconnaissance patrols around Moivrons and Villers. The regiment relieved the *Landwehr Regiment 17* at Delme on 11 September with Bischoff's *III Battalion* stationed as an outpost unit in Lemoncourt.[33]

As the *30th Bavarian Reserve Infantry Division* moved to consolidate its position at the Delmer Ridge on 13 September, it was attacked by strong French

[28] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 16.
[29] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 16.
[30] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 17. This was the 10th Royal Bavarian Reserve Infantry Brigade, named for the commander, LtGen August Ipelkofer (1857–1933). *Formationsgeschicte und Stellunbesetzung der deutschen Streitkräfte 1815–1990* (Osnabrück: Biblio Verlag, 1990), vol. 1, 659. See also "Koeniglich Bayerische Reserve-Infanterie-Brigade," Wikipedia, accessed 4 January 22.
[31] Cron, *Imperial Germany Army, 1914–1918*; 111; and Deuringer, *The First Battle of the First World War–Alsace-Lorraine*, 278.
[32] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 17.
[33] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 18.

forces in what became known as the Battle of Aulnois. In response to the grave situation, Major Bischoff detached elements of two companies to move to the sound of the battle as reinforcements for the rest of the division that was engaged close to Aulnois.[34] Following this engagement, Bischoff and eight other soldiers received the battalion's first Eisernes Kreuz (Iron Cross) medals on 5 October 1914.[35]

As the weather cooled in late 1914, operations in Lorraine were reduced as both sides realized the rugged terrain significantly limited the potential success of winter military operations. The war's focus shifted farther to the west in France. The division was transferred to the Somme region near Sainte-Quentin in September, where it remained for the rest of 1914.[36] Taking the opportunity to reorganize, *Brigade Ipfelkofer* was renamed the *61st Infantry Brigade* on 2 December 1914.[37] The period from January to March 1915 was relatively quiet.

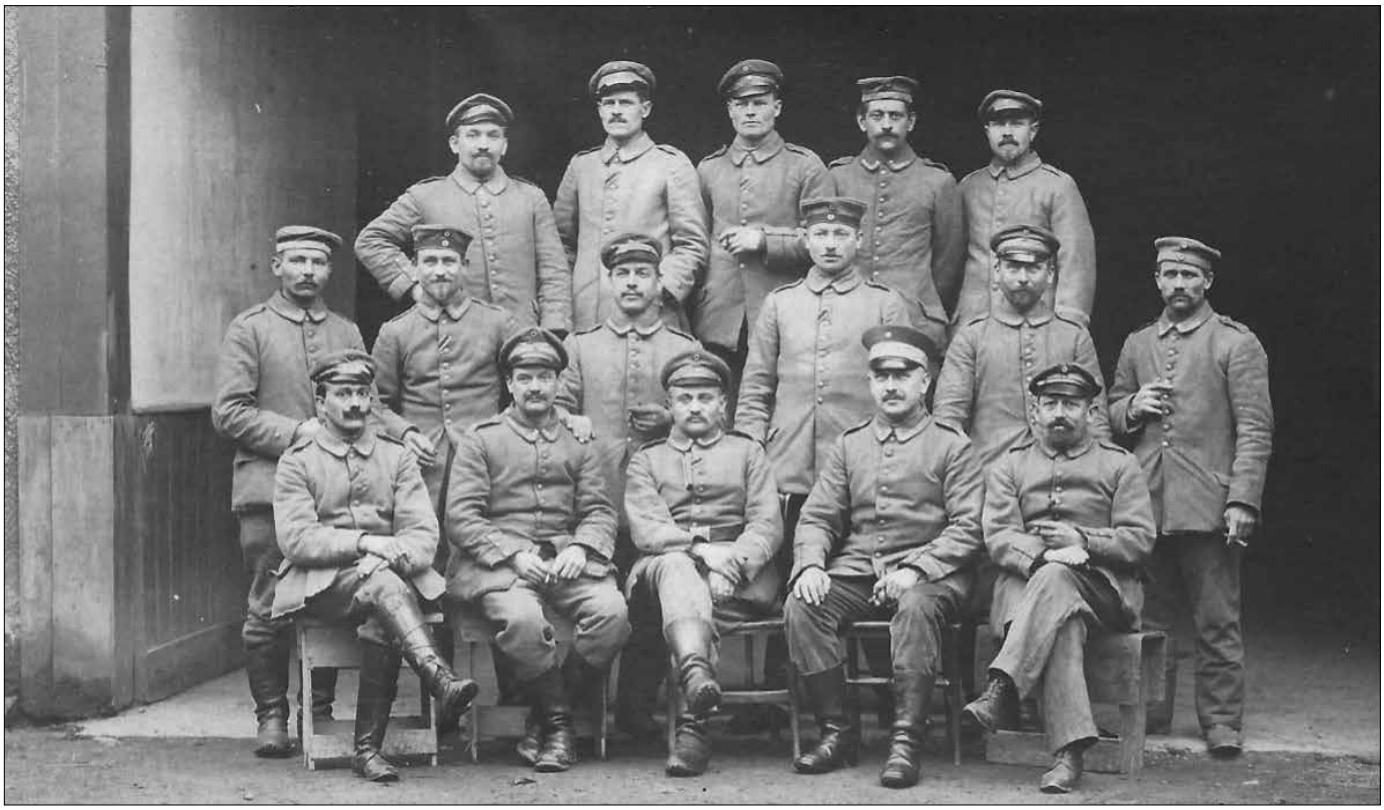
On 17 May 1915, the *60th Reserve Infantry Regiment* became part of *13th Landwehr Infantry Division* in line on a quiet sector of the Lorraine Front and participated in defensive operations.[38] The regiment also spent the month completing some needed tactical training, receiving 110 replacements, and conducting aggressive patrolling against the French outposts.[39] By end of June 1915, *60th Reserve Infantry Regiment* was replaced by *82d Landwehr Infantry Regiment* and assigned to the *5th Bavarian Landwehr Brigade* of the *1st Bavarian Landwehr Infantry Division*.[40]

Remaining a reserve unit, the regiment spent its time improving positions about 5 kilometers southwest of Avricourt (about 30 kilometers due east of Nancy), working mostly at night due to French harassing artillery fire. The combat activity of the regiment increased in July 1915 as units were sent piecemeal to various hot spots. Then, the Army High Command issued orders to assault several positions on key terrain in a wooded area known to the Germans as the *Sachsenwald* (Saxon Wood) southeast of Leintrey on 15 July 1915.[41] Given the task of taking this critical terrain feature, the regiment suffered heavy casualties in an unsuccessful attempt. The regimental history notes that 8 officers and 40 soldiers were killed in action and 2 officers and 118 soldiers were wounded.[42]

Later, during intense combat near Lorquin (9.6 kilometers southwest of Sarrebourg) on 23 July 1915, Bischoff's *III Battalion* distinguished itself by repulsing the main French attack. Major Bischoff was awarded the Iron Cross, First Class on 4 August 1915, for his resolute leadership under fire.[43] As the summer ended, the regiment was finally back together as a unit on 6 September 1915 after weeks of Army reserve duty, the misery of static warfare, and constant patrolling. However, between 27 and 30 September, patrolling increased dramatically in front of the regiment to provide early warning of an enemy build-up in anticipation of a new offensive.[44] As a result, the Army High Command was still focused on the Saxon Wood, which continued to be an area of particular importance as it provided excellent positions for artillery forward observers.

On 4 October 1915, attack preparations began with rehearsals, which were conducted on similar terrain the following two days.[45] The attack force consisted of Bischoff's battalion, two platoons from the *60th Machine Gun Company*, *2d Battalion*, of the *122d Landwehr Infantry Regiment*, and *Engineer Company 8*. The attack force's approach march early on 8 October to its attack positions used previously identified routes that provided excellent concealment from the French positions. Formed into three attack columns, the force was arrayed with Captain Niethammer (*122d Landwehr Infantry Regiment*) leading the *12th Company*,

[34] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 19.
[35] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 23. Presumably the Iron Cross, 2d Class.
[36] *Histories of Two Hundred and Fifty-one Divisions of the German Army (1914–1918)* (Washington, DC: U.S. War Office, 1920; London: Naval & Military Press, 1989), 397.
[37] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 31.
[38] Cron, *Imperial Germany Army, 1914–1918*, 111.
[39] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 38.
[40] U.S. War Department, *Histories of Two Hundred and Fifty-one Divisions of the German Army*, 234, 45.
[41] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 44–45.
[42] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, annex 5 "Battle Losses," 244.
[43] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 47.
[44] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 50.
[45] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 50.



Author's collection

A postcard showing the enlisted leadership of *11 Company, 3d Battalion, RIR 60*, March 1916.

60th Reserve Infantry Regiment, the *6th Company*, *122d Landwehr Infantry Regiment*, and one platoon from the machine gun company on the right. The middle column was led by Lieutenant Colonel Vohwinkel, the *2d Battalion*, *122d Landwehr Infantry Regiment*, commander, with the *5th* and *7th Companies*, *122d Landwehr Infantry Regiment*. Major Bischoff commanded the left column consisting of his *10th* and *11th Companies*, with one platoon from the machine gun company. Each column was supported by four engineer squads and an artillery liaison team.[46]

In preparation of the attack, the Germans conducted an artillery barrage for two hours beginning at 1430 to breach the obstacles in front of the objective. The attack commenced at 1720. The approach by Bischoff's column had the easiest effort due to the use of the Gondrexon Creek. The low ground in the creek bed enabled him to move onto favorable ground 1,100 meters from the French position in front of Reillon to the southwest. After heavy fighting that resulted in 26 killed in action and 153 wounded, the objectives were taken and the units prepared for a counterattack. The French obliged them with an unsuccessful assault at midnight. During a lull in the fighting at 0430 the next morning, Bischoff's *III Battalion* was relieved and became the *13th Bavarian Landwehr Infantry Division* reserve in Avricourt.[47]

With its status as the brigade reserve, the *III Battalion* was able to rest and recover despite the rest of the regiment returning to combat shortly thereafter. However, Bischoff's time in the rear quickly came to an end when intelligence reports arrived that reported the French were massing to take back the Saxon Wood position. On 15 October at 0800, the attack began with an artillery and trench mortar barrage. With the timely arrival of reinforcements, disaster was averted. Bischoff quickly deployed the reinforced *11th Company* that participated in strenuous combat all

[46] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 52.

[47] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 52–54.

day. Although the French attackers suffered heavy casualties, they were unable to recover the ground taken originally on 8 October. Due to the heavy artillery fire and close combat, when the fighting had stopped on 18 October, the Saxon Wood was devastated.[48]

Due to their leadership during October while serving with the *Bavarian Brigade*, Colonel Friedrich Zechlin and Major Bischoff received coveted Bavarian military decorations for bravery, although they were both Prussian. Zechlin received the Bavarian Military Merit Order, 3d Class, with crown and swords. Bischoff was awarded the 4th Class Order, with crown and swords, on 28 November 1915.[49] The remaining months of 1915 saw the struggle on the western front settle into stagnant trench warfare as winter approached. The regiment retired to winter quarters near Avricourt for the rest of the year.[50]

At the end of January 1916, the German High Command became alarmed about the enemy advantage in men and material on the western front. It then decided to begin a campaign against Verdun with attrition warfare. To mask the preparations for the offensive, a series of screening operations in January and February were directed. The *60th Reserve Infantry Regiment* participated in those operations in eastern France until it left for a training area in late February. At the beginning of March, the regiment went back to the front and monotonous trench warfare.[51]

While in the trenches, word reached the regiment that Major Bischoff was leaving. He had volunteered to be a member of the first Pasha Expedition (Pasha I) for service in the Middle East.[52] Sensing an opportunity after the Allied disaster at Gallipoli and the withdrawal from the peninsula in early 1916, the German High Command wanted to transfer troops to the Middle East for the first time to support a second attempt to take the Suez Canal.[53]

Bischoff was a likely candidate probably in large measure due to his prior service in Africa and obvious exemplary conduct in France. However, his file in the Reich Finance Ministry concerning later pension entitlements contains Bischoff's personal account of his medical history, which included contracting malaria in East Africa. According to his account, the *Armee-Abteilung Falkenhausen*'s senior medical officer recommended that Bischoff volunteer for the Palestine operation (Pasha I) due to the dry climate in the Middle East in view of his chronic respiratory illness.[54] His departure from the regiment on 18 March must have been a difficult scene, as "he was always an example to his III Battalion of loyalty, duty and bravery and had distinguished himself through tireless care for the welfare of his subordinates and had earned their respect and trust to a high degree."[55]

Leaving Berlin on 29 March 29, the Pasha I force finally arrived at Beersheba in Palestine on 2 June after a long and exhausting journey that was reportedly like taking the famous Orient Express to Istanbul.[56] The Pasha I force included German machine gun, artillery, aviation, and technical formations with its ally, Austria-Hungary, providing a mountain howitzer detachment.[57] These units were intended to support

[48] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 55–58.
[49] *Militär-Wochenblatt*, no. 232/233 (13 December 1915): 5443–44; Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 59; and Erhard Roth, *Verleihungen von militärischen Orden und Ehrenzeichen des Königreiches Bayern im Ersten Weltkrieg 1914–1918* (Offenbach: PHV Phaleristischer Verlag Autengruber, 1997), 61.
[50] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 64.
[51] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 68.
[52] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 69.
[53] Cron, *Imperial Germany Army, 1914–1918*, 61.
[54] *Armee-Abteilung Falkenhausen* (named for Gen Ludwig Freiherr von Falkenhausen [1844–1936]) was created in Alsace-Lorraine on 17 September 1914 from the parts of *6th Army*. The staff of the dissolved *Ersatz Corps* under Gen Falkenhausen (Pour le Mérite, 23 August 1915; second award, 25 April 1916) took command. Cron, *Imperial Germany Army, 1914–1918*, 84; Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:388; and Bischoff memorandum to Reich Finance Ministry, 7 December1932, German Federal Archives, Reich Finance Ministry, BArch, R 43-I/2725, PDF Doc. 3844ff. Having contracted malaria in East Africa during 1899–1900, his service on the winter western front surely exacerbated any breathing problems. In fact, he was hospitalized between 30 October 1915 and 11 December 1915 for bronchitis. Undated note, German Federal Archives, Reich Finance Ministry, BArch, R 43-I/2725, PDF Doc. 3841.
[55] Zechlin, *Das Reserve-Infanterie-Regiment Nr. 60 im Weltkrieg*, 69.
[56] Capt Heinrich Römer and Lt Wilhelm Ande, *Mit deutschen Maschinengewehren durch die wüste Sinai* (Berlin: Industrieverlag Spaeth & Linde, 1917), 19.
[57] Specifically "one machine gun battalion with 50 guns, four flak-platoons, four heavy batteries including two *mörser* [heavy mortar] batteries, three minenwerfer [trench mortar] detachments, one aviation unit with 16 airplanes, a bridge crane, communications, motor vehicles, medical, and catering formations, a collective 140 officers and officials,

the *Sinai Expeditionary Corps* of the Turkish *4th Army*, commanded by German lieutenant colonel Freiherr Kress von Kressenstein, appointed a colonel in the Ottoman Army.[58] Presumably due to his experience in Southwest Africa, Major Bischoff was appointed a lieutenant colonel in the Ottoman Army and the commander of the *1st Turkish Camel Regiment*.[59]

Colonel Kressenstein's Suez campaign began on the evening of 16 July 1916, when the vanguard, consisting of three battalions, three machine gun companies, three artillery batteries, three pioneer companies, and several supply columns, was finally able to advance against the canal from al-Arish, Egypt.[60] The corps consisted of three columns of approximately 16,000 troops heading toward Romani. The northernmost column followed the coastal road and the southernmost one marched through Um Bayud. The main body concentrated on Bir Katia while Bischoff and his camel regiment were directed to go farther south through the Magara Mountains, with the order to demonstrate against Ismailia.

After a difficult and exhausting march, Kressenstein decided to attack on 4 August, despite being challenged by supply shortages. He felt he could not turn back without at least attempting to defeat the English force.[61] He decided the focus of the attack would be against the south flank of the enemy at Romani. Part of his *3d Division*, supported by heavy artillery, attacked the main enemy position on 4 August at dawn. The larger part of the Turkish infantry and the German machine gun units were assigned to bypass and catch the enemy's right wing from the south. But the movement was delayed. This caused them to begin in broad daylight rather than in darkness, and the element of surprise was lost. Instead of surrounding the enemy, the left Turkish wing was surrounded by the enemy's strong mounted forces that evening. Capturing two Turkish battalions and a battery, the British force threatened the now-exposed and weakened Turkish flanks from the direction of el-Qantara, Lebanon. As the battle unfolded, Kressenstein regretted the decision to send Bischoff so far to the south that effectively prevented his camel regiment from influencing the English counterattack.[62] Finally, Kressenstein decided to retreat on the night of 5 August and proceeded in the following days to el-Arish. The withdrawal was harassed by continuous fighting with the pursuing British force.[63]

Thus, this second attempt to close the Sinai Canal ended with the Allied repulse of the *Sinai Expeditionary Corps* at the Battle of Romani on 3–4 August 1916. The defeat of Kressenstein's troops forced them to retreat toward Gaza on 14 August, and any subsequent attempts to take the canal were abandoned. Subsequently moving into Palestine to reconstitute, the German contingent spent some weeks recovering from the arduous expedition. During this period, many German troops returned to Germany for rehabilitation. Bischoff returned to Germany in October 1916 and was assigned to the replacement battalion of his old unit, the *60th Reserve Infantry Regiment*.[64] In honor of his performance in the Sinai and Palestine, Bischoff was awarded sometime that fall the Ottoman War Medal for gallantry, referred to by the Germans as the *Eiserne Halbmond* or Iron Crescent Moon.[65]

1507 men who were prepared to march from Germany in the middle of January." Reichkriegsministerium, *Der Weltkreig 1914–1918*, vol. 10, *Die Operationen des Jahres 1916 bis zum Wechsel in der Obersten Heeresleitung* (Berlin: Verlegt bei E. G. Mittler & Sohn, 1936), 611.

[58] Friedrich Freiherr Kress von Kressenstein (1870–1948), Pour le Mérite, 4 September 1917, General of Artillery (Ret). Kressenstein was part of the German military mission of Gen Otto Liman von Sanders (1855–1929) to the Ottoman Empire.

[59] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:119.

[60] Freiherr Kress von Kressenstein, *With the Turks to the Suez Canal* (Berlin: Vorhut-Verlag Otto Schlegel, 1938), 179.

[61] Kressenstein, *With the Turks to the Suez Canal*, 184.

[62] Kressenstein, *With the Turks to the Suez Canal*, 185.

[63] *Der Weltkrieg–1914–1918, Die Operationen des Jahres 1916*, vol. 10 (Berlin: Reichskriegsministerium, E. S. Mittler & Sohn, 1936), 613.

[64] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:119.

[65] Bischoff's personal effects and papers in a private collection contains the Ottoman or Turkish War Medal and ribbon on his ribbon bar (personal collection of George Malick, San Jose, Costa Rica). It was a decoration that was instituted on 1 March 1915 for meritorious conduct in combat. It could be awarded to members of the army, navy, and nursing services of either Turkey or its allies. Although it is sometimes erroneously called the Gallipoli Star, it had no special connection to that campaign and was awarded throughout the world war. The Germans called it the *Eiserne Halbmond* or Iron Crescent Moon. M. Demir Erman, *The Turkish War Medal* (Privately published, 2012), 41ff. See also "Turkish War Medal (1915)," Australian War Memorial, accessed 10 May 2020.

Prints and Photographs Division, Library of Congress, LCCN 2007675298

The Camel Corps at Beersheba, 1915. Bischoff's camel regiment would have looked like this.

On 2 January 1917, Major Bischoff was appointed commander of the newly established *461st Infantry Regiment*, *237th Infantry Division*.[66] Seasoned veterans were needed to get this division ready for combat as it contained young recruits and "returned sick and wounded and men taken from the front." The division was transferred for occupation duty to Galicia shortly after its creation.[67] Bischoff quickly gained the highest reputation among superiors and subordinates. Standing out as a capable officer in the static warfare in Galicia (now western Ukraine), Major Bischoff was later able to prove his splendid soldierly ability during the important counterattacks in East Galicia in July 1917. His division commander, General von Jacobi, named him the "Bravest of the Brave," based on Napoléon's famous description of his commander, Marshal Michel Ney.[68]

After arrival in theater, the *237th Infantry Division* joined *Army Group Woyrsch* in early March and later participated in the static warfare in the area near Brzezany between 8 April and 26 June 1917.[69] Due to an anticipated Russian offensive, the division moved closer to be in support as part of the Austro-Hungarian *2d Army* on 1 July 1917.[70] On the same day, the *Eleventh* and *Seventh Russian Armies* began an attack across the front at the direction of Alexander Kerensky, min-

[66] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:119.
[67] *Histories of Two Hundred and Fifty-one Divisions of the German Army*, 729.
[68] Hanns Möller, *Geschichte der Ritter des Ordens "Pour le Mérite" im Weltkrieg* (Berlin: Verlag Bernard & Graefe, 1935), 95.
[69] Named for the commander Gen Remus von Woyrsch (1847–1920), who was recalled from retirement by the German Army in August 1914. He retired at this own request in December 1917 and was promoted to field marshal. "Remus Martin von Woyrsch," Prabook.com, accessed 26 November 2020; and *Die Schlachten und Gefechte des Grossen Krieges 1914–1918* (Berlin: Grossen Generalstab, H. Sack, 1919), 257.
[70] Herman Cron, et al., *Ruhmshalle unserer alten Armee* (Berlin: Verlag für Militärgeschichte un deutsches Schrifttum, undated), vol. 1, 394.

Author's collection

The officers of the *461st Infantry Regiment* in Russia, 1917.

ister of war in the Provisional Russian Government, in what became known as the Kerensky Offensive.[71] Between 30 June and 6 July, Bischoff and his *461st Infantry Regiment* fought in the battles east of Zloczow (now Zolochiv, Ukraine) in recovering lost territory initially taken by the Russians.[72]

After initial successes against the combined German and Austro-Hungarian forces, the Russian "gains were modest and bought at huge cost."[73] Coupled with a significant malaise within the ranks and with severely strained logistics support, the Russians were easy targets for the major counterattack that began on 19 July. A key aspect of the attack was spearheaded by General von Winckler's *Abschnitt Zloczow* that contained *Corps Wilhelmi* to which the *461st Infantry Regiment*, *237th Infantry Division*, was attached.[74]

The mission of *Abschnitt Zloczow* was to force a crossing at the Sereth River after breaking through Zloczow to pursue the Russians, probably retreating southward.[75] The *237th Infantry Division* was able to seize the bridgehead across the Sereth River in large measure due to the "dashing approach" of *461st Infantry Regiment* and its successful holding the crossing for follow-on forces. This is when Bischoff "showed . . . excellent leadership of the I.R. 461 as its assault has 'his fingerprints' all over it."[76] Likely, the veteran

[71] David Stevenson, *1917: War, Peace, and Revolution* (Oxford, UK: Oxford University Press, 2017), 163ff.
[72] *Die Schlachten und Gefechte des Grossen Krieges,* 285.
[73] Prit Buttar, *The Splintered Empires: The Eastern Front 1917–21* (Oxford, UK: Osprey Publishing, 2017), 163.
[74] Prit Buttar, *The Splintered Empires*, 180.
[75] Gen [Max] von Hoffman, *The War of Lost Opportunities* (Uckfield, UK: Naval and Military Press, 1924), 185.
[76] Hanns Möller, *Geschichte der Ritter des Ordens "Pour le Mérite" im Weltkrieg*, 95.

Author's collection

Bischoff with regimental staff in Russia, 1917.

Bischoff recognized the significance of the bridge and led his troops in spirited offensive action to take the high ground on the east bank, thereby securing the crossing for the rest of the attacking force.

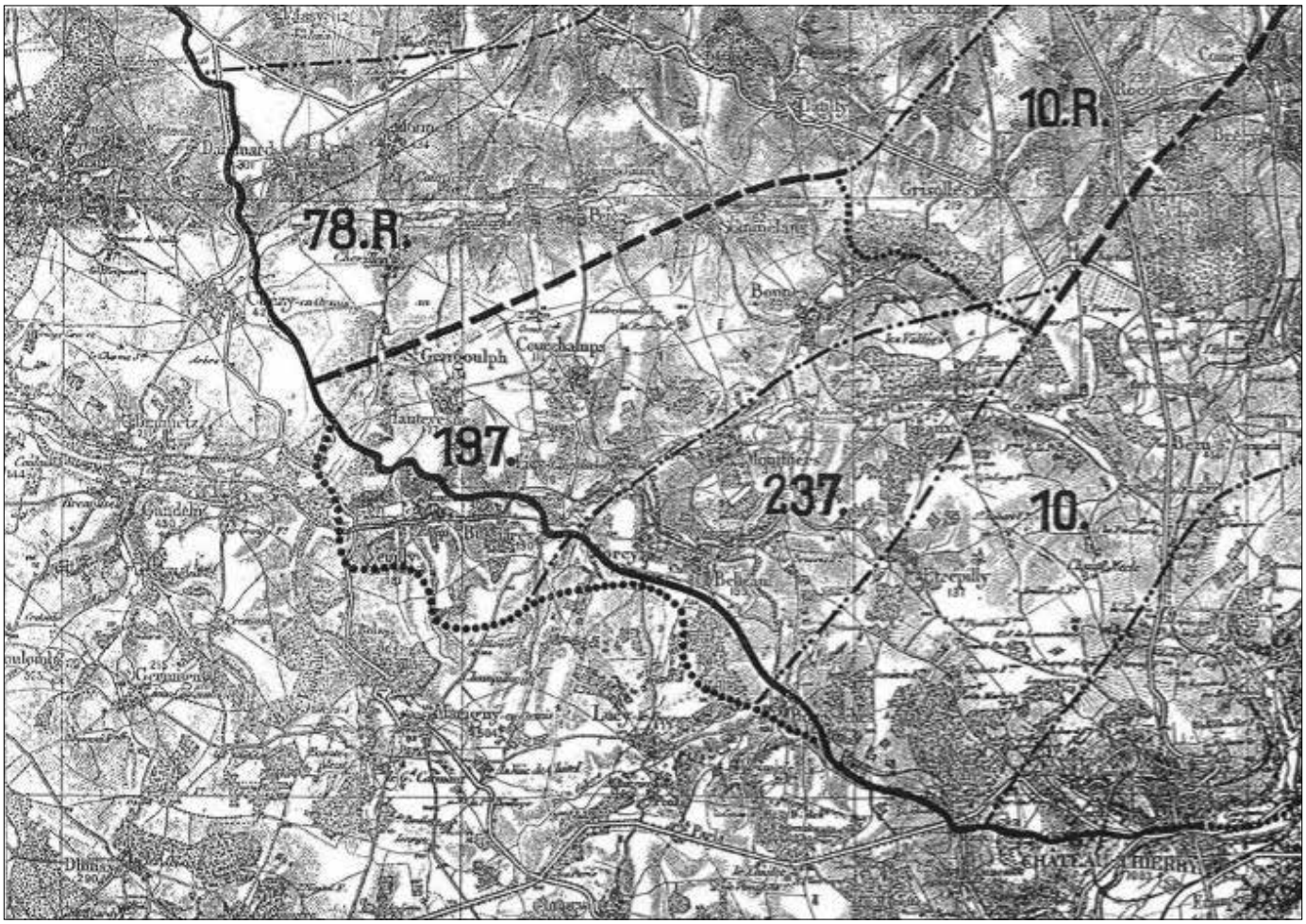
The battle continued as the counterattack with *Corps Wilheimi* pursued a disintegrating Russian Army.[77] By 2 August, *Army Group South*, to which the *237th Infantry Division* now belonged, settled into static positional warfare. Following the failure of the Russian minster of war Aleksandr Kerensky's June Offensive, the Russian Army basically disintegrated, and conditions were ripe for the Bolshevik Revolution, which gained momentum and eventually took power in November. A result of the key role played by his regiment under this leadership, Bischoff was awarded with the Royal House Order of Hohenzollern Knight's Cross, with swords, on 20 October 1917.[78] This decoration had become an intermediate award between the Iron Cross, 1st Class, and the Pour le Mérite for Prussian junior officers.[79]

Recognizing the dire military situation, the new Russian leadership proposed a ceasefire on 26 November 1917, which led to negotiations at Brest-Litovsk beginning on 3 December. With the conclusion of the Brest-Litovsk Agreement on 8 February 1918, the state of war between Germany/Austria-Hungary and Russia ended. This permitted the Germans to move a large force back to the western front with the objective of ending the war on their terms. In anticipation of a favorable result of the negotiations, Bischoff's

[77] Buttar, *The Splintered Empires*, 183.

[78] "Ordens-Verleihungen," *Militärisches Wochenblatt*, no. 48 (20 October 1917): 1243–44. See also Willi Geile, *Die Ritter des Königlichen Hausordens von Hohenzollern mit Schwerten im Ersten Weltkrieg* (Offenbach: PHV Verlag, 1997), 13.

[79] "House Order of Hohenzollern," Wikipedia, accessed 31 October 2017.



Reich Archives, Schlacten des Weltkreiges, vol. 32, Map Supplement No. 2
German deployment, *IV Reserve Corps*, west of Château-Thierry, Operation Blucher, early June 1918.

regiment, which had been on occupation duty, had already begun its journey back to the western front on 17 December 1917.[80]

Arriving back in France on 12 January 1918, the *237th Infantry Division* settled in a cantonment near Verdun. In mid-May, as the German Army began preparations for Operation Blucher, the third of its offensives seeking to end the war, the *461st Infantry Regiment* began to move closer to the Marne as part of *Corps Conta* (*IV Reserve Corps*), German *7th Army*. When the battle began on 27 May, the Germans overran the French and British units from the Chemin des Dames to the Marne and threatened to continue all the way to Paris. Following the initial success, the *237th Infantry Division*, following in trace, joined the offensive and arrived in the vicinity of Belleau Wood on 1 June 1918.[81]

Deploying in opposition to this German offensive was the American 4th Brigade (Marine), consisting of the 5th and 6th Marine Regiments, as part of the U.S. Army's 2d Infantry Division. Created by the Marine Corps in 1917 following the American declaration of war, these regiments were comprised of long-serving professional Marine officers and staff noncommissioned officers and enlisted men who were mostly new recruits. The first battalion of the 5th Regiment arrived in France on 27 June 1917, and by 3 July the entire regiment was assembled on French

[80] *Die Schlachten und Gefechte des Grossen Krieges*, 301.

[81] *Histories of Two Hundred and Fifty-one Divisions of the German Army*, 730.

soil.[82] The last battalion of the 6th Regiment did not join the American Expeditionary Force until 6 February 1918.[83] Although the 4th Brigade headquarters had been established in October 1917, it was not until 10 February 1918, that the brigade was fully formed in the training area at Bourmont, France.[84]

The 2d Division went to the trenches on 13 March 1918, in a so-called quiet sector southeast of Verdun for frontline training.[85] From 17 to 30 March, elements participated in the occupation of sectors on the west face of the Saint-Mihiel salient. The division continued its service at the front until 9–16 May when relieved to conduct further training.[86] On 18 May, it was assigned to the French Group of Armies of the Reserve. As a result of the German offensive on 27 May 1918, the brigade's scheduled Decoration Day (now known as Memorial Day) festivities were cancelled. The division was placed at the disposal of the French 6th Army on 31 May by American Expeditionary Forces commander General John J. Pershing and was directed to the French XXI Corps sector near Château-Thierry to assist in the Aisne defensive.[87] As a result, the Marines were on the road to Belleau Wood.

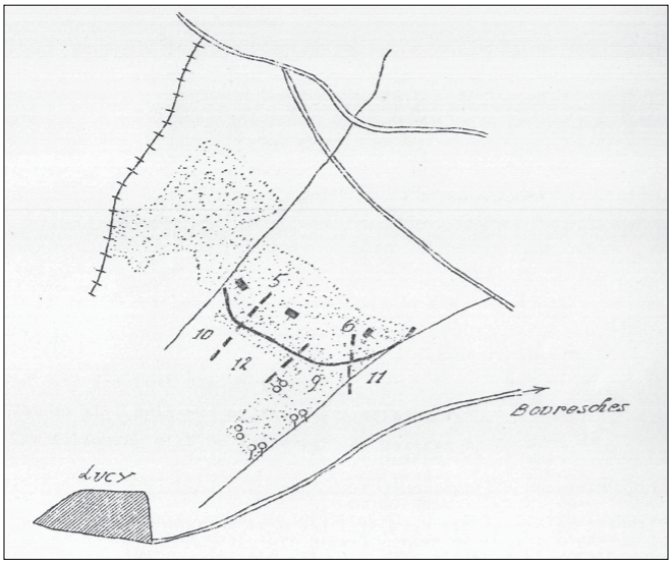
The 4th Brigade deployed to the north of the Paris-Metz Highway northwest of Château Thierry as French units passed through them to the rear. In front of the Marines was a heavily wooded former hunting preserve known as Belleau Wood. Unknown to the Allies, the German offensive ran out of steam on 4 June due to physical exhaustion and lack of supplies. To consolidate their gains and prepare for subsequent operations on 7 June to secure the Paris–Metz Highway, the Germans selected Belleau Wood as a key area to occupy because it presented an excellent advanced position to cover avenues of approach for follow-on forces. Thus, elements of the German *237th Infantry Division* that had invested the woods on 3 June, unbeknownst to the Allies, became the focal point of the German defense.[88]

The primary responsibility for German defense of Belleau Wood was given to Major Bischoff's *461st Infantry Regiment*. He set to work immediately preparing defensive positions in-depth anchored by machine guns with interlocking fields of fire dividing the woods into two battalion sectors. As noted in Bischoff's map in the war diaries, Major Hans von Hartlieb's *I Battalion* was placed in the northern sector and Captain Kluge's *III Battalion* defended the southern portion.[89] Exhibiting a masterful use of the terrain and natural features, such as rock formations and heavy vegetation, Major Bischoff's efforts resulted in a virtual fortress surrounded by a sea of wheat.

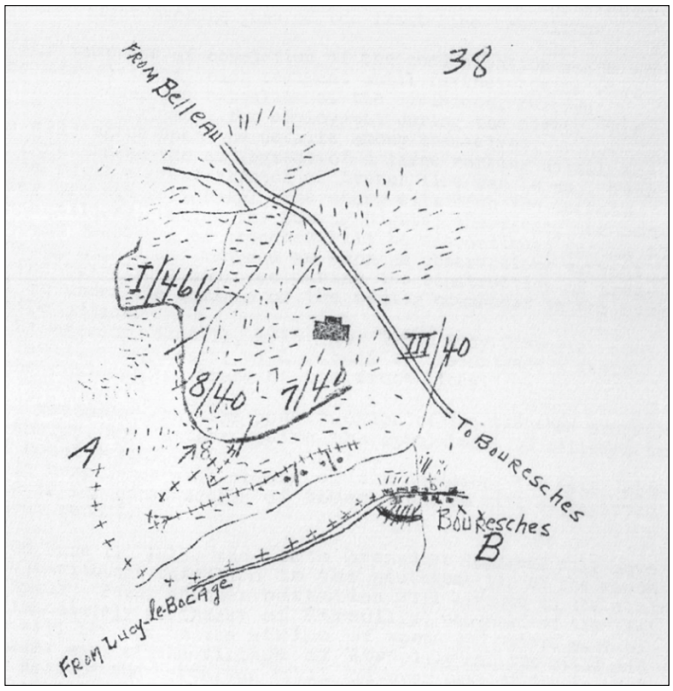
Bischoff took advantage of the existing terrain and the evolution of German operational doctrine as it related to the tactical defense. By 1918, the German Army understood the importance of depth in the battlespace and the need to engage the enemy throughout its entirety, not just at the forward edge of the battlefield. As noted in Timothy T. Lupfer's Leavenworth Papers monograph:

> In their new tactical doctrine, the Germans avoided excessive emphasis on the struggle at the forward edge, where forces initially collided. The de-

[82] Edwin N. McClellan, *The United States Marine Corps in the World War* (Washington, DC: Historical Branch, G-3 Division, Headquarters Marine Corps, 1968), 31.
[83] McClellan, *The United States Marine Corps in the World War*, 32.
[84] McClellan, *The United States Marine Corps in the World War*, 33.
[85] BGen Edwin H. Simmons and Col Joseph H. Alexander, *Through the Wheat: The U.S. Marines in World War I* (Annapolis, MD: Naval Institute Press, 2008), 67.
[86] Simmons and Alexander, *Through the Wheat*, 79.
[87] Simmons and Alexander, *Through the Wheat*, 80.
[88] War Diary, 3rd Battalion, 461st Infantry Regiment, June 1–17 1918, vol. 4, in *Translations of War Diaries of German Units Opposed to the Second Division (Regular)* (Washington, DC: U.S. Army War College, 1930–32), 4, hereafter German War Diaries. The U.S. National Archive and Records Administration holds an extensive collection of World War I-era German Army documents. As the collection webpage notes: "In August 1920, Col. Oliver Spaulding, head of the Army War College's Historical Section, began work toward the acquisition from German sources of documents relating to Germany's involvement in World War I. This was followed up by Lt Col. Edward Davis, the U.S. military observer in Berlin in late 1920. Col. Davis traded copies of the American plans for the St. Mihiel offensive to German archivists in exchange for copies of documents relating to German operations. This led to the establishment of a liaison [section] under which American personnel; working in Potsdam, Germany; undertook the selection, copying, and to some extent the translation of German military logs, annexes, war diaries, and related material. Most of the original documents in the German archives were destroyed in April 1945 during a British air raid which caused a fire in the Army Archives, Potsdam." German Military Records Relating to World War I, 1918–1938, NAID 4928349, National Archives and Records Administration, accessed 6 December 2022.
[89] 244th Infantry Brigade, Doc. 36, in German War Diaries, vol. 4, n.p.



War Diary, 3d Battalion, 461st Infantry Regiment, 1–17 June 1918, German War Diaries, vol. 4
Bischoff's *3d Battalion* initial defensive scheme for the southern portion of Belleau Wood, 4–5 June 1918.



War Diary, 2d Battalion, 40th Fusilier Regiment, 7 June–3 July 1918, German War Diaries, vol. 3
German defensive reorganization, 9–10 June 1918, with Bischoff's *1st Battalion* and *2d Battalion, 40th Hohenzollern Fusilier Regiment*.

> fensive principles discarded the rigid belief that the defended space must remain inviolate. The enemy attack penetrated the defended space, but the depth of the battlefield weakened the attacking force, preserved the defender, and enhanced the defender's success of retaliation through counterattack.[90]

Thus, Bischoff prepared Belleau Wood defenses with the understanding that penetrations would take place. However, when they did, the enemy would be subjected to immediate and violent attack from the flanks. Lupfer notes:

> In their offensive principles, the Germans did not aspire to achieve total destruction at the thin area of initial contact; they used firepower and maneuver in a complementary fashion to strike suddenly at the entire enemy organization. The offensive and defensive principles did not regard the enemy as an impediment or irritant to the methodical seizure or holding of terrain. The enemy force was the fundamental objective.[91]

When the Marines commenced the two-pronged assault of Belleau Wood late in the afternoon of 6 June 1918, the 3d Battalion, 5th Regiment, and the 3d Battalion, 6th Regiment, were greeted with devastating fire from the prepared positions. "By far from weakly held, Belleau Wood contained a whole German regiment, the [*461st Infantry Regiment*] of the [*237th Infantry Division*], with an effective strength according to the Division report of 28 officers and 1141 men."[92] By the time the next day dawned, the Marines had suffered more casualties than in all the years of the Marine Corps' existence up to that time. The total loss for the

[90] Timothy T. Lupfer, *The Dynamics of Doctrine: The Changes in German Tactical Doctrine During the First World War*, Leavenworth Papers no. 4 (Fort Leavenworth, KS: U.S. Army Command and General Staff College, Combat Studies Institute, 1981), 57.

[91] Lupfer, *The Dynamics of Doctrine*, 57.

[92] Spaulding and Wright, *The Second Division, American Expeditionary Force in France, 1917–1919*, 53. It was only two battalions.

Courtesy of personal collection of George Malick, San Jose, Costa Rica
Medals and honors awarded to LtCol Bischoff: (top) Pour le Mérite medal; (middle, left to right) Iron Cross 2d Class, Royal House Order of Hohenzollern 3d Class (knight) with swords, Red Eagle Order 4th Class with swords, Crown Order 4th class with swords, Long Service award (25 years of service), Southwest Africa Service medal; Colonial Service medal, Kaiser Wilhelm Centenary medal, Bavarian Military Merit Order 4th class with swords, and the Ottoman Empire Military War Medal for Merit (Gallipoli Star); and (bottom, left to right) Iron Cross 1st Class and the Ottoman Military War medal.

day was 31 officers and 1,056 men killed, wounded, or missing.[93] The *461st Infantry Regiment* suffered many casualties itself that day as well. German lieutenant colonel Ernst Otto's excellent account of the battle states the division suffered 6 officers and 72 enlisted killed, 10 officers and 218 enlisted wounded, and 5 officers and 90 enlisted missing.[94]

As described by U.S. Army major general James G. Harbord, who commanded the 4th Brigade at the time, Belleau Wood was approximately 1.6 kilometers (1 mile) square with a dense tangle of undergrowth.

> The topography of the greater part of the wood, especially in the eastern and southern portions, was extremely rugged and rocky, none of which was shown in any map available at the time. Great irregular boulders . . . were piled up and over and against one another. . . . These afforded shelter for machine-gun nests, with disposition in depth and flanking one another, generally so rugged that only direct hits of artillery were effective against them.[95]

From 6 June onward, the struggle for Belleau Wood was a violent struggle of close combat with Marine battalions slowly forcing the Germans to withdraw. Unfortunately for the Marines, the depleted *461st Infantry Regiment* mounted a stout defense and remained in control of the wood until relieved due to exhaustion.[96] The battle finally concluded on 26 June when the 3d Battalion, 5th Regiment, drove the last of the Germans from the northern edge of the forest back into the village of Belleau.

The *461st Infantry Regiment* might have been successful longer but for one tactical blunder by higher command prior to its withdrawal from the fighting on 16 June.[97] When his regiment arrived in the area, Major Bischoff was assigned the responsibility of occupying Belleau Wood. As noted above, he immediately began to create a wooded fortress, taking advantage of the natural obstacles and terrain. An experienced combat veteran, he deployed his regiment throughout the woods, tying in with adjacent units, especially the *10th Division* that held the village of Bouresches to his left. Defended by four companies (*9th*, *10th*, *11th*, and *12th*) of his *III Battalion*, this left flank in the southeast corner of the Belleau Wood proved critical in his defense.

[93] Spaulding and Wright, *The Second Division, American Expeditionary Force in France, 1917–1919*, 54.
[94] Ernst Otto, "The Battles for the Possession of Belleau Woods, June 1918," U.S. Naval Institute *Proceedings* 54, no. 11 (November 1928): 949.
[95] James G. Harbord, *The American Army in France 1917–1919* (Boston, MA: Little, Brown, 1936), 287.
[96] *Histories of Two Hundred and Fifty-one Divisions of the German Army*, 730.
[97] 1st Battalion, 461st Infantry Regiment, June 1918, Doc. 55, in German War Diaries, vol. 4, n.p.

For the next several days, the southern half of Belleau Wood and Bouresches were the focal points of severe fighting, especially the left flank units of Bischoff's *461st Infantry Regiment*. Bischoff was constantly in the woods, even during the strongest artillery fire, and led all counterattacks personally. Only because of his personal bravery and effective leadership did the regiment maintain its hold of the woods.[98]

Following the fall of Bouresches during the night of 6 June, the German *10th Infantry Division* was no longer combat effective and was replaced by the *28th Infantry Division*. As part of the relief, the new division's *40th Fusilier Regiment* was given responsibility for the southeastern portion of Belleau Wood previously held by the left flank unit of Bischoff's regiment. During this reorganization between 7 and 9 June, the four frontline companies of the *III Battalion*, *461st Infantry Regiment*, were replaced with only two, the *7th* and *8th Companies*, from the *40th Fusiliers* (see map no. 38). Major Bischoff was furious and complained to the division commander that the terrain demanded more forces to defend.[99] He was well aware that the nature of the terrain and heavy undergrowth would frustrate coordination between units in case of an attack at the boundary.

Field Marshall Irwin Rommel noted the hazards of combat in heavily forested areas in his classic *Infantry Attacks* after the war:

> The fight in Doulcon woods emphasizes the difficulties of forest fighting. One sees nothing of the enemy. The bullets strike with a loud crash against trees and branches, innumerable ricochets fill the air, and it is hard to tell the direction of the enemy fire. It is difficult to maintain direction and contact in the front line; the commander can control only the men closest to him, permitting the remaining troops to get out of hand. Digging shelters in a woods [*sic*] is difficult because of roots. The position of the front line becomes untenable when—as in the Doulcon woods—one's own troops open fire from the rear, for the front line is caught between two lines of fire.[100]

According to both Colonels Otto and Thomason, Bischoff's objections went unheeded. The diary of the *II Battalion*, *40th Fusilier Regiment*, indicates that the regiment in fact did relieve the *III Battalion*, *461st Infantry Regiment*, on 8 June with two companies in the line and two companies in reserve outside the woods, north of Bouresches.[101] Later, it appears Major Bischoff's concerns were addressed partially on 10 June. The *II Battalion*, *40th Fusiliers*, diary for that date notes that the battalion now believed two companies were too weak and assigned another company to the reserve.[102] However, failure to put additional units in the woods was a costly mistake.

The 4th Brigade attacked the Germans again in force on 11 June in the center of Belleau Wood. With the 2d Battalion, 5th Regiment, assaulting from the west and the 1st Battalion, 6th Regiment, entering the woods at the southern edge, the Americans accomplished what Major Bischoff feared. Striking at the boundary between the *I Battalion*, *461st Infantry Regiment*, and the *II Battalion*, *40th Fusiliers*, the Corps' 5th Regiment met stiff resistance and the assaulting companies on the right turned south to find the 6th Regiment's attackers. Unfortunately for the Germans defenders, the Marines collided with right flank of the *40th Fusiliers*. As noted in the *II Battalion*, *40th Fu-*

[98] Möller, *Geschichte der Ritter des Ordens "Pour le Merite" im Weltkrieg*, 95–96.

[99] Otto, "The Battles for the Possession of Belleau Woods," 951; and Thomason, *The United States Army Second Division Northwest of Chateau Thierry in World War I*, 123. The Thomason account contains the following footnote: "Colonel Otto, Reichsarchiv, 2nd Div. file." The original Otto document cited by Thomason appears to be lost to history, but Otto's language in his 1928 *Proceedings* article confirms Thomason's account written about the same time. See also Ernst Otto, *Sternenbanner gegen Schwarz-Weiz-rot* (Berlin: Verlag Tradition Wilhelm Rolf, 1930), vol. 1, 1–38.

[100] Erwin Rommel, *Infantry Attacks* (Provo, UT: Athena Press, 1979), 24–25.

[101] German War Diaries, vol. 3, 2nd Battalion, 40th Fusilier Regiment, 7 June–3 July 1918, Entry for 8 June 1918, German War Diaries, n.p.

[102] German War Diaries, vol. 3, 2nd Battalion, 40th Fusilier Regiment, 7 June–3 July 1918, entry for 10 June 1918, n.p.

siliers' war diary, the 5th Regiment attacked through the sector of *461st Infantry Regiment* which meant they were already in the rear of the two forward German companies of the fusiliers.[103] Almost simultaneously, elements of the Marine Corps' 1st Battalion, 6th Regiment, attacked the *40th Fusiliers* on the other flank. The result was that the German regiment was attacked in both flanks and driven from the woods. As described by Colonel Thomason:

> Under such pressure, the two companies of the 40th were torn to pieces, and their heavy machine gun defense broken up. The support and reserve companies, approaching from the east were caught in flanking fire from [the Marines in] Bouresches, and stopped. The developments anticipated by the 461st Regiment [i.e., Major Bischoff] . . . were all realized.[104]

A complete disaster was prevented by a counterattack from two companies of *461st Infantry Regiment*, but the Germans were not able to recover the territory lost.[105] Now controlling the southern portion of Belleau Wood, the Marines directed their attention solely to *461st Infantry Regiment* to the north, the only German unit left in the woods. A German defeat was only a matter of time.

Following a failed counterattack by Bischoff's regiment and the *110th Baden Grenadiers*, *28th Infantry Division*, on 13 June, the Germans abandoned any intention of recapturing Belleau Wood in its entirety and ceased offensive operations.[106] After a week of hard fighting, their physical condition was deteriorating due to exhaustion and illness. Indeed, the *12th Company*, *III Battalion*, *461st Infantry Regiment*, had already requested relief on 11 June because the "combat power of most of the men is zero."[107] According to the Reich Archives account:

> The capability of the regiments employed here had been dramatically reduced, not only as a result of the casualties but also because of the wave of influenza that had swept the entire German Army like an epidemic on 9 June. On 13 June, for example, the combat strength of the [461st Regiment in the wood] was (excluding machine gun company and supply units): . . . 12 officers, 429 troops[108]

Even with normal personnel rotations and casualties prior to Belleau Wood, this figure is remarkable when you consider the normal regimental complement was roughly 1,176.[109] The situation was so desperate that the division commander was forced to use every spare man he could find, placing in the line 340 "orderlies, liaison agents, and odd details serving in rear areas."[110] They were sorely needed. According to Lieutenant Colonel Otto, the *461st Infantry Regiment* alone suffered 303 killed in action and 1,077 wounded between 6 and 16 June.[111] Indeed, the entire *237th Infantry Division* was so decimated by combat and illness that it was withdrawn from the sector by 22 June.[112]

Slowly but surely during the next few days, the German perimeter shrank until they held only the northernmost edge of Belleau Wood anchored by the old hunting lodge, referred to as the Pavilion. Scarred by battle damage, it still stands today as a testament to the savage conflict. The end came on 26 June when the 3d Battalion, 5th Regiment, drove the last of the defenders of the *87th Infantry Division* from Belleau Wood and the American battalion commander an-

[103] German War Diaries, vol. 3, 2nd Battalion, 40th Fusilier Regiment, 7 June–3 July 1918, entry for 11 June 1918, n.p.
[104] Thomason, *The United States Army Second Division Northwest of Chateau Thierry in World War I*, 137–38.
[105] *Wachsende Schwierigkeiten*, 189.
[106] Otto, "The Battles for the Possession of Belleau Woods," 957.
[107] German War Diaries, vol. 4, 3rd Battalion, 461st Infantry Regiment, June 1918, Entry for 11 June 1918, n.p.
[108] *Wachsende Schwierigkeiten*, 191.
[109] Cron, *Imperial German Army 1914–1918*, 112.
[110] Thomason, *The United States Army Second Division Northwest of Chateau Thierry in World War I*, 163–64.
[111] Otto, "The Battles for the Possession of Belleau Woods," 949–57.
[112] *Histories of Two Hundred and Fifty-one Divisions of the German Army*, 730.

nounced, "Belleau Woods now U.S. Marine Corps entirely."[113]

By the end of June, the mangled *237th Infantry Division* was relocated to the Vauquois sector near Verdun and received 2,000 replacements. The butcher's bill was considerable for the defense of Belleau Wood. During this rest and recuperation period Major Bischoff was awarded the Pour Le Mérite on 30 June 1918, for the defense of Belleau Wood earlier that month.[114] The Pour Le Mérite, known popularly as the "Blue Max," was the German Reich's highest award for gallantry. The citation reads in part:

> In the period from June 3 to June 11, Major Bischoff repeatedly repelled the American 2d Division's constant attacks against the forest, which resulted in heavy enemy losses. He held in the face of heavy artillery fire and personally led the defense and counterattack. It was only thanks to his courage and comprehensive actions that he was able to hold the forest with the weakened remnants of his regiment against superior forces. He led his regiment in an exemplary manner in difficult circumstances.[115]

After being considered combat-ready in late August, the division reinforced units at St. Aubin in northern France but was withdrawn in early September. Relieving the *34th Infantry Division* in the area between Saint-Quentin and Soissons on 25 September 1918, the *237th Infantry Division* participated eventually in the series of final battles of the war as the German Army withdrew from one defensive line to another and suffered heavy casualties.[116] Unfortunately, Major Bischoff was recommended for promotion to lieutenant colonel in November 1918, but the promotion was never authorized as the war ended.[117] On the day following the Armistice, it began the return to Germany and ultimate demobilization.[118]

At the end of the war, Bischoff was swept up in the collapse of the German Empire. With the abdication of the Kaiser, withdrawal from France and demobilization after the Armistice, he was a Prussian officer with an uncertain and unparalleled predicament.[119] Indeed, as noted by J. W. Wheeler-Bennett in *The Nemesis of Power: The German Army in Politics 1918–1945*, the Prussian officer corps were a military caste bound only by their oath of "unconditional obedience" to the Kaiser.[120] They did not consider themselves bound by civil law, which obviously caused problems with a democratic transition. This point is aptly described in an infamous anonymous novel of military service in the Prussian Army published in 1904. In one scene in *Life in A German Crack Regiment*, an older retired officer drinking with his son, a serving officer, laments:

> When the cry is raised against them by the other classes the officers always defend themselves with, "Remember we belong to the highest caste; we have our own sense of honour [*sic*], which you cannot understand; our thoughts are not your thoughts, nor yours ours, God be thanked!"[121]

In the face of domestic anarchy and threats from the Poles and Russians in the east, political leaders of Germany looked to these professionals to lead volunteer units of returning veterans to provide stability during the Weimar Republic. These paramilitary units, or *Freikorps*, sprang up all over Germany as the war end-

[113] Thomason, *The United States Army Second Division Northwest of Chateau Thierry in World War I*, 180.
[114] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:119.
[115] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1: 118.
[116] *Histories of Two Hundred and Fifty-one Divisions of the German Army*, 730.
[117] German Federal Archives, Reich Finance Ministry, R 43-I/2725, Doc. 3683.
[118] *Ruhmeshalle unserer alten Armee*, vol. 1, 454.
[119] *Die Schlachten und Gefechte des Grossen Krieges 1914–1918* (Berlin: Kingdom of Prussia, H. Sack, 1919), 412.
[120] J. W. Wheeler-Bennett, *The Nemesis of Power: The German Army in Politics 1918–1945* (New York: St. Martin's Press, 1964), 4.
[121] Baron von Schlicht [Wolf Count von Baudisson], *Erstklassige Menschen* (Berlin: Otto Frank, 1904); and *Life in a German Crack Regiment* (New York: Dodd Mead, 1915), 186.

Bischoff, Die letzte Front, Geschichte der Eiserne Division im Baltikum, 1919 (Berlin: Buch und Tiefdruck Gesellschaft m.b.H, 1935), after 222
Thorensberg (now Torņakalns) is a neighborhood of Riga, Latvia, located on the western bank of the Daugava River, 1920.

Suddeutsch Zeitung Photo Archive
The staff of *Eiserne Division* in the Baltic, 1919.

Alamy Images
Bischoff (center) at Riga Bridge, 1919.

ed in response to the internal threats, perceived and real, from independent socialists and Bolsheviks.[122] Comprised of demobilized soldiers longing for effective leadership and stung with the bitterness of defeat and social revolution manifesting in Germany, the units gravitated to men like Bischoff, one of the professional army officers volunteering to lead them.[123] As a German nationalist and known effective combat leader, he went on to command the *Iron Division of the Freikorps* (*Free Corps*) in the Baltic War in 1919.

Added to that chaotic situation were concerns about the Baltic states occupied by the Germans during the war. The Treaty of Brest-Litovsk ended the war in the east with Soviet Russia in 1917 and ceded the Baltic states to Germany. With the 1918 Armistice, however, Soviet Russia renounced the Brest-Litovsk agreement. As the Baltic provinces began independence movements in face of the German defeat, Soviet forces invaded. The Inter-Allied Commission of Control created by the Versailles Treaty was concerned about Soviet Russia's expansion and came up with a clever plan to thwart the "red peril": use German troops to defend the Baltics against the Soviets.[124] This plan also gave the German High Command an opportunity to "redeem the defeat in the West."[125] With existing German Army units still in the region, Germany was given the responsibility to maintain order and resist the Soviets.[126] Thus, a German force was created with German veterans under command of General Rüdiger von der Goltz. Included in the composite force was a Freikorps unit known as the *Iron Brigade*.

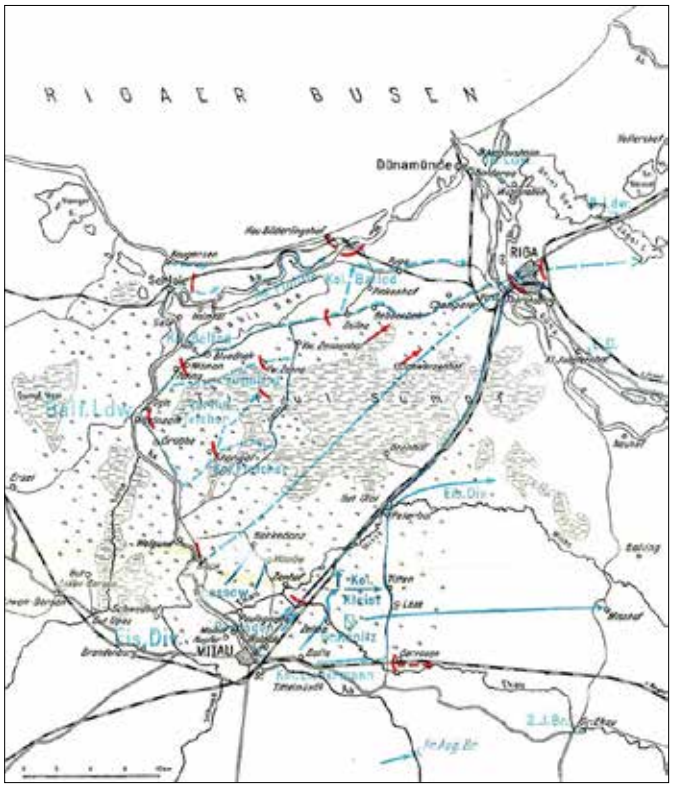
The *Iron* (or *Eiserne*) *Brigade* was created during November 1918 and Bischoff would be its commander beginning in January 1919, now reorganized as a divi-

[122] Harold J. Gordon, *The Reichswehr and the German Republic 1919–1926* (Port Washington, NY: Kennikat Press, 1972), 4.
[123] Nigel Jones, *The Birth of the Nazis: How the Freikorps Blazed a Trail for Hitler*, rev. ed. (London: Robinson, 2004), 114; and A. J. Nicholls, *Weimar and the Rise of Hitler*, 4th ed. (New York: St. Martin's Press, 2000), 23.
[124] Robert G. L. Waite, *Vanguard of Nazism: The Free Corps Movement in Postwar Germany 1918–1923* (New York: W. W. Norton, 1969), 100.
[125] Waite, *Vanguard of Nazism*, 97–98.
[126] Tomas Balkelis, *War, Revolution, and Nation-Making in Lithuania, 1914–1923* (Oxford, UK: Oxford University Press, 2018), 66.

sion.[127] The new division was comprised of remnants of the German *8th Army* who been stationed in the region and refused to leave because they "wanted to settle in the country," and new volunteers from Germany looking for a fight and any loot that may be available as a result.[128] However, the original *Iron Brigade* was not successful in the early fighting in the Baltic against Russian invaders. Bischoff "managed only by the strength of his personality and his manner" to mold it into an effective division-size force after his arrival on 7 January 1919.[129]

In *The Kings Depart: The Tragedy of Germany—Versailles and the German Revolution*, author Richard M. Watt notes:

> Though only a major, Bischoff was already a legendary figure. He did everything with superb style. When complimented on the ease with which he lit his cigarette in a strong wind, Bischoff shrugged and said, "Oh, you learn that. . . . This is my twelfth year of warmaking—eight years in Africa, then the World War."[130]



Representations of the post-war battles of German troops and Freikorps, *vol. 2 (Berlin: E. S. Mittler and Sohn, 1937)*
Map of the Battle for Riga, 1919.

Not surprisingly, the *Iron Division* was considered one of the better military organizations during this chaotic period in German history.

On 3 March 1919, a combined German and Latvian Army under the command of General Goltz (1865–1946), including the *Iron Division*, drove the Russians from Latvia within a month.[131] However, the victory bore bitter fruit, as more German recruits arrived from Germany with unrealistic promises of Latvian citizenship. The German *Freikorps* force captured Riga from Soviet Latvian defenders on 22 May 1919, but the relationship between the hosts and the Germans began to sour. The Germans alienated their hosts with instances of pillage, plunder, and other excesses. Any hope of citizenship in Latvia was quickly quashed. As a result, the German units were becoming increasingly irrelevant, and the embryonic national governments of Lativa and Lithuania were anxious for the Germans to return to Germany.[132]

Suffering defeats in June–July 1919, the *Freikorps* units became concerned about lack of support from the German government and calls for all German forces to return to Germany following the signing of the Treaty of Versailles on 28 June 1919. As author Annemarie H. Sammartino notes: "As prospects in Germany became increasingly bleak, the Freikorps fighters found consolation in the east."[133] While some of the officers as German nationalists, including

[127] Gordon, *The Reichswehr and the German Republic 1919–1926*, 435; and Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:119.
[128] Ernst von Salomon, *The Outlaws*, 3d ed., trans. Ian F. D Morrow (London: Arktos Media, 2013), 65.
[129] Rudiger von der Goltz, *My Mission in Finland and the Baltic*, trans. Peter J. Kalnin (n.p.: Peter J. Kalnin, 2013), loc. 2459 of 6599, Kindle.
[130] Richard M. Watt, *The Kings Depart: The Tragedy of Germany—Versailles and the German Revolution* (New York: Simon and Schuster, 1968), 380.
[131] Buttar, *The Splintered Empires*, 379ff.
[132] Balkelis, *War, Revolution, and Nation-Making in Lithuania, 1914–1923*, 106.
[133] Annemarie H. Sammartino, *The Impossible Border: Germany and the East, 1914–1922* (Ithaca, NY: Cornell University Press, 2010), 60.

Bischoff, contemplated a coup attempt against the German government to reverse the humiliation of Versailles, the *Freikorps* soldiers rejected this plan in hopes of remaining in the Baltics.[134]

The negotiations on the terms of the status of the *Freikorps* with the German government dragged on in August 1919 without resolution until a dramatic event at the Mitau railroad station on 24 August. According to veteran Ernst von Salomon, as a regiment moved to board a train back to Germany,

> a tall sunburnt officer stepped on the platform. At his neck shone the *Pour le mérite*. He was the C.O. of the Iron Division, Major Bischoff. He looked at the train—the soldiers crowded round him filled with vague hopes. Officers joined them. The major raised his hand. "I absolutely forbid the withdrawal of the Iron Division." That was mutiny.[135]

Mutiny, indeed. However, Bischoff spoke earnestly for the interests of the men of the *Iron Division* who felt they were betrayed by both the Latvian and German governments. The former was condemned for refusing the promised citizenship and the latter for not supporting the troops in their effort to obtain citizenship.[136] This must have been a difficult decision for a career Prussian officer. Major Bischoff must have realized the implications of refusing to comply with orders from higher headquarters. However, showing considerable care for his soldiers, whom he had led in a hard campaign, he nevertheless chose the dramatic gesture at the train station and would not abandon them. As he recalled in his memoir:

> That's why I didn't hesitate for a moment to take responsibility towards the government and command authorities. It weighed more heavily on me towards the troops. In the old army, we officers had been brought up to regard every single one of our subordinates as an asset entrusted to our trust. And each one was only a link in the whole system built on duty, obedience and justice, which ultimately culminated in the person of the Kaiser. Now the officer faced his troop alone and as a personality. The volunteer had committed himself to him, not to the government or a higher office. This gave the leaders a heavy duty to stand up for their troops.[137]

General Goltz was sympathetic as well, although he could not approve of the refusal of orders. To mitigate the situation, Goltz issued a *VI Reserve Corps* order in which he stated, "In spite of my disapproval of the refusal to obey orders, I cannot abandon the troops. I will convey these demands to the German Government, advocate for them, and continue to care for the troops until the decision is made."[138]

As Ernst von Salomon reported, some soldiers accepted the orders from the German government and left. Others, like himself, severed any ties to the new Germany and remained.[139] They soon became volunteers in a new West Russian Volunteer Army commanded by the White Russian General Pavel Avalov-Bermondt.[140]

However, the subsequent fall season of 1919 proved to be one of misfortune and disappointment for the "refugee" German contingent. With the refusal of many of the Freikorps soldiers to obey the orders to return, the German government was under increasing pressure from the victorious Allies to force their removal. As the White Army began its campaign on 8 October 1919, the German government was closing the border with Lithuania and, thereby, cutting off the German contingent from reinforcements and supplies. As Bischoff wrote later,

[134] Sammartino, *The Impossible Border*, 62.
[135] Salomon, *The Outlaws*, 100.
[136] Sammartino, *The Impossible Border*, 65.
[137] Bischoff published an account of his service: Josef Bischoff, *Die letzte Front, Geschichte der Eiserne Division im Baltikum*, 1919 (Berlin: Buch und Tiefdruck Gesellschaft m.b.H, 1935), 192.
[138] Goltz, *My Mission in Finland and the Baltic*, 4768 of 6599, Kindle.
[139] Salomon, *The Outlaws*, 101.
[140] Sammartino, *The Impossible Border*, 66.

> Most disastrous was the rapid decrease in our combat strength. On October 8, the division had carried out the seemingly impossible attack through the swamp to Riga; it had literally been in the water for 48 hours in freezing wind and rain. The clothing was worn out, many did not even have a coat, the shoes were worn out, and there was no change of underwear or woolen socks. The Iron formation, for example, sent 80 men to the military hospital on two consecutive days due to pneumonia and intestinal diseases. Lack of nutrition and clothing was the cause in the unfavorable weather. The battles were heavy and costly in terms of lives. The ranks thinned out quickly and alarmingly.[141]

By November, the army had not received any supplies of men, ammunition, or materiel since the Germans closed their border. Bischoff's assessment for the future was bleak:

> In view of the military and general situation, I had to admit to myself already during the night of November 19/20 that not only was a continuation of the fight hopeless, but that each day of our remaining there increased the danger of being cut off from our routes of retreat.[142]

In view of the poor state of the combined West Russian Volunteer Army, Bischoff notified the general command on 20 November that the German contingent was retreating under his command and that he had ordered the evacuation of Mitau for the night of 20–21 November. At nightfall, the troops began to separate from the opposing Latvian forces as ordered and slowly withdrew toward Lithuania with the goal of returning to Germany. The German military units left Latvia on 30 November 1919 and finally returned to Germany on 16 December.[143] Bischoff's return to Germany was anything but quiet with demands for courts-martial of the mutinous officers for their impunity and their stubborn defiance of civilian authority and failure to adhere to directions from the German government.[144] However, there were calls for amnesty, especially for Bischoff, as he was considered the "soul of his division" and the troops were so attached to him.[145]

Jumping into the fire from the frying pan, Bischoff then participated in an unsuccessful coup known as the Kapp Putsch on 13 March 1920, which was an unsuccessful coup d'etat attempting to overthrow the Weimar Republic. Objecting to the implementation of the Treaty of Versailles and the mandatory reduction of the German Army, many prominent leaders of the coup were former imperial officers, now *Reichswehr* and *Freikorps* officers, including several Pour le Mérite recipients like Bischoff. In fact, Bischoff resisted any attempts to demobilize his *Iron Division* on its return from the Baltic, and it was still intact in the German countryside.[146] Under the leadership of naval captain Hermann Erhardt, a naval brigade stormed into Berlin to take over the government as officials fled. A new chancellor, Wolfgang Kapp, assumed the leadership of the German government. However, the coup never got off the ground. Kapp's military leader, General Freiherr Walther von Lüttwitz, failed to gain the support of the government's senior military commanders, who really controlled the power of the Weimar Republic.[147] Facing intense resistance from the socialists and civil servants, alongside a debilitating general labor strike, the coup collapsed on 17 March.

[141] Bischoff, *Die Letzte Front 1919*, 234.
[142] Bischoff, *Die Letzte Front 1919*, 238.
[143] Goltz, *My Mission in Finland and the Baltic*, loc. 6466 of 6599, Kindle.
[144] Watt, *The Kings Depart*, 380, 386.
[145] "Impunity of Baltic Troops," no. 156, Cabinet Meeting of 28 January 1920, the Bauer Cabinet, Reich Chancellery Files, Weimar Republic, German Federal Archives, accessed 24 February 2012.
[146] "Die Vorgeschichte des Militärputsches," *Berliner Tageblatt und Handels-Zeitung*, 24 March 1920, 4.
[147] "Junker Revolt in Germany: Story of the Kapp-Luettwitz Counter-Revolution and the Causes of Its Failure—New Communist Revolt," in *The New York Times Current History* (New York: C. H. Pub., 1920), 6; and Robert G. L. Waite, *Vanguard of the Nazism: The Free Corps Movement in Postwar Germany 1918–1923* (New York: W. W. Norton, 1952), 147.

Arrested for treason this time, Bischoff was fortunate enough to be released and retired on 8 April 1920.[148] Unfortunately, his pension was suspended effective 1 April 1920. To escape prosecution, he left Germany and moved to Vienna, Austria. He remained there in exile with his new bride, the Baroness Dorothea von Fircks (1878–1968), from an established Baltic noble family whom he married on 24 March 1920.[149]

Exile did not protect him from controversy. Indicted in July 1920 for high treason, Bischoff's assets were seized in December 1921. Although arrest warrants for the Kapp putschists were issued in August 1922, none of conspirators were tried once the Reichstag passed a law on 2 August 1925 that pardoned crimes committed during the putsch. Subsequently, as reported in a German newspaper, criminal arrest warrants were then quashed.[150] Unfortunately, that still did not end the matter for Bischoff.

While in exile, he waged an ongoing postal battle with the German Reich Finance Ministry over his military pension and the government claims for damages from the Kapp Putsch.[151] With the treason indictment, Bischoff's military pension had been withheld until 1 August 1925. Appealing the decision to withhold any back pension, Bischoff was successful in a Munich Pension Court decision in April 1926 in recovering pension payments starting 1 January 1923. The recovery of any monies owed to him from 1 April 1920 to 31 December 1922 was considered barred by a statute of limitations.

Compounding the financial injury, in its meeting of 12 July 1927, the Reich Cabinet decided to recover the claims for damages from the Kapp Putsch against the pension entitlements of the main military conspirators: retired General Baron von Lüttwitz, Bischoff, and retired Imperial Navy Captain Ehrhardt.[152] The Reich Labor Ministry rejected such claims, as the pensions were not attachable for such purposes.[153]

Notwithstanding the rejection, on 12 August 1929, the Reich Cabinet assessed Bischoff and the others responsible for 6 million Reichsmarks in gold for damage arising from their involvement in the Kapp Putsch. Ehrhardt sued to stop the entire process.[154] On 2 December 1930, the German Supreme Court overruled an earlier ruling of the Court of Appeal whose decision held the damages claim against Ehrhardt's pension were inadmissible. Following a hearing on 2 June 1931, the Berlin Court of Appeal ruled on 23 July that there was insufficient evidence to determine whether Ehrhardt was culpable financially for any alleged damages during the Kapp Putsch.[155] Although the Reich Finance Ministry's records for Bischoff are incomplete, it is reasonable to assume that the decision was applicable to Bischoff.

Bischoff returned to Germany sometime between January and September 1934, as reflected in the addresses in his correspondence in the Reich Finance Ministry's files.[156] In retirement on the eve of World War II, Bischoff was promoted to the brevet or honorary rank of lieutenant colonel on 27 August 1939, the 25th anniversary of the Battle of Tannenberg.[157] All living Pour Le Mérite winners of World War I were invited to the Hindenburg Memorial in East Prussia and given honorary promotions. Bischoff was honored with the brevet rank of lieutenant colonel at a classic mas-

[148] Bischoff letter in file, undated, Doc. 3712, R_3901_10247, Reich Finance Ministry, German Federal Archives.

[149] Death certificate of Dorothea von Fircks of Standesamt, Charlottenberg, Berlin, 10 December 1968, Ancestry.com, accessed 29 June 2018.

[150] "Irrefuhrung," *Frankfurter Zeitung*, 30 August 1925; and Ernst Feder, "Aufhebung des Haftbefehls gegen Ehrhardt," *Frankfurter Zeitung und Handelsblatt*, 30 August 1925, Digitalisierung der Pressearchive von HWWA und IfW, accessed 13 December 2020.

[151] The online records of the Reich Chancellery during the Weimar Republic from 1927 note that claims for damages against the *Freikorps* should be offset from the pensions of senior officers, to include Maj Bischoff. "Payment of Pension to General of the Infantry Baron von Lüttwitz," no. 273, Ministerial Meeting of 12 July 1927, the Marx Cabinet, BArch R 3901/10247 and R 43-I/2725, Reich Finance Ministry, German Federal Archives.

[152] Gen Walther Freiherr von Lüttwitz (Ret) (1859–1942); Hermann Ehrhardt Korvettenkapitän (Ret) (1881–1971). Letter dated August 1927, PDF Doc. 6759, BArch R 43-I/2725, Reich Finance Ministry files, German Federal Archives.

[153] Letter dated 1 October 1927, PDF Doc. 3647, BArch R 43-I/2725, Reich Finance Ministry files, German Federal Archives.

[154] Letter dated 12 August 1927, PDF Doc. 33692-3, BArch R 43-I/2725, Reich Finance Ministry files, German Federal Archives.

[155] "Die Pension des Kapitäns Ehrhardt," Hamburgisches Welt-Wirtschafts-Archiv [Hamburg World Economic Archives], 23 July 1931.

[156] BArch, R 3901/10247 German Federal Archives, Reich Finance Ministry.

[157] Hildebrand and Zweng, *Die Ritter des Ordens Pour le Mérite des I. Weltkrieg*, 2:1:119.

sive Nazi ceremony attended by Adolf Hitler. Some believe it was intended by Hitler to mask the movement of the German Army to the region as a prelude to the invasion of Poland shortly thereafter.[158] Bischoff never wore the uniform again due to poor health, as reflected in the Finance Ministry's files. He died on 12 December 1948 of coronary heart disease in Berlin-Charlottenburg, Germany, where he was buried.[159]

Conclusion

When the 4th Marine Brigade faced the wheat fields in front of Belleau Wood in June 1918, little did they know that the opposing German commander was a career Prussian officer and a seasoned veteran of soldiering. Prior to that eventful summer, Bischoff had amassed considerable experience in leading troops in battle. Beginning his military career in German colonial Africa, he learned valuable lessons in tactics and combat leadership with the *Schutztruppe*. It was here that Bischoff exhibited the rare ability to analyze the battlefield and to determine how that battle would transpire. He was decorated for doing just that and saving his commander in 1904.

Successfully transitioning to the battlefields of Europe in 1914, Bischoff possessed a remarkable skill to translate those lessons to a modern army of the industrial age. He became a respected battalion commander who received prestigious awards for valor during the battles in rugged eastern France, the desolate Sinai Desert, and the southern Russian front. His actions in 1917 leading his regiment to secure the Sereth River crossing exemplify his knack of understanding the importance of his mission and the impact of his leadership on men in battle.

In 1918, when assigned the task of defending Belleau Wood, Bischoff exhibited the quality of tactical leadership so admired today. A critical component of this quality is the ability to develop an understanding of the battlespace, or *coup d'œil* as described by Carl von Clausewitz. This is the talent to observe the battlefield and ascertain those opportunities in the operational environment that will contribute to success. It is obvious from all accounts of the battle for Belleau Wood that Major Bischoff did just that. Although his forces were depleted by combat and disease, his effective use of terrain, supplemental positions, and supporting arms in the tactical defense allowed his regiment to hold the woods until withdrawn on 16 June. This is quite remarkable considering that Belleau Wood was, according to General Harbord, about 1.6 kilometers (1 mile) square. Nevertheless, Bischoff persevered and was decorated with his nation's highest award for gallantry for his conduct during that hot summer of 1918. Major Bischoff left behind a notable record of service marked by dedication to his nation, great leadership in battle, and considerable physical endurance. His tactical skills highlight his ability to maintain discipline and morale among his troops during times of greatest need. With the armistice, his exceptional abilities were called on again.

The German military campaign in the Baltic states in 1919 began successfully as the Russian Red Army was driven out. This success was due in large measure to the leadership of Bischoff and the fighting prowess of the men of his *Iron Division*. However, the German volunteers were mere pawns in postwar politics and promises made were not followed by actions on their behalf. Pursued by the Allies and vilified by their own government, whom they felt had abandoned them, the division was held together by Bischoff's steel will alone. As a commander, he took very seriously the desires and dreams of his men, who performed so well under brutal conditions. He understood his responsibility in support of his men and their aspirations for a better future in the Baltic states.

At great professional risk as a career officer, he declined to comply with the German government's directive to return to Germany. With a heightened sense of honor, and a bit of theatrics, he made sure that the plight of his soldiers was publicized by the railroad station speech. His actions at the railroad station in August 1919 are the stuff of legends. But this performance brought them only a temporary reprieve.

[158] Robert Kirchubel, *Atlas of the Blitzkrieg, 1939–41* (Oxford, UK: Bloomsbury Publishing, 2019), 38.
[159] Death certificate of Josef Bischoff, Berlin-Charlottenburg, Landesarchiv Berlin, Germany, no. 4231, dated 13 December 1948, via Ancestry.com.

Eventually, the German government abandoned them, leaving to suffer under terrible conditions with little chance of success. Only very reluctantly, in the fall of 1919 when all hopes were extinguished, did Bischoff lead his men across the German frontier in an outstanding example of military leadership. Unfortunately, his greatest military triumph would lead to his financial ruin through his involvement in the Kapp Putsch.

Josef Bischoff was a highly decorated combat veteran who has the distinction of being one of the few tactical combat leaders to be mentioned by name in his enemy's battle histories, probably a greater tribute to his mastery of the art of war. Commanding from the company to division level against different foes in different terrains, he consistently exemplified those attributes of soldierly virtue so greatly admired today. He should be considered one of the most effective commanders to oppose Americans at war in any era.

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Missed Opportunities

KENNEDY, THE MARINE CORPS, AND COUNTERINSURGENCY, 1961–1963

By Nathan R. Packard, PhD

Abstract: This article examines the U.S. Marine Corps' response to President John F. Kennedy's pledge to counter Communist inroads in the developing world and attempts to reconcile competing historiographic interpretations of the Marine Corps' response to counterinsurgency. Clarifying the relationship between Kennedy, the Marine Corps, and counterinsurgency sheds light on U.S. civil-military relations during a pivotal period of the Cold War.

Keywords: antiguerrilla warfare, civil-military relations, counterinsurgency, Flexible Response, General David M. Shoup, Lieutenant General Victor H. Krulak, Marine Corps Concept, population-centric counterinsurgency, small wars, slippage, Vietnam War

> This is another type of war, new in its intensity. . . . It requires in those situations where we must counter it, and these are the kinds of challenges that will be before us in the next decade if freedom is to be saved, a whole new kind of strategy, a wholly different kind of force, and therefore a new and wholly different kind of military training.
>
> ~ John F. Kennedy[1]

> The Counterinsurgency business. . . . The Marines knew it was going to go away. Of all the services, the Navy and Marines were the most obtuse, and the Marines most obtuse of all. "Hell, we've been to Nicaragua, we know all about that jazz. We don't need any special individual in our outfit"—and they never had one. They paid the President of the United States lip service.
>
> ~Lieutenant General Victor H. Krulak, USMC (Ret)[2]

Introduction

During his inaugural address, President John F. Kennedy declared that "the torch has been passed to a new generation of Americans" who were prepared to "pay any price, bear any burden, [and] meet any hardship" to ensure the furtherance of freedom around the world. He identified the Third World as a pivotal battleground in the "long twilight struggle" between the Communist Bloc and the Free World and pledged the full support of the United States for "those people in the huts and villages of half the globe" struggling to break free from colonialism and poverty.[3] Kennedy's

Dr. Nathan R. Packard is an associate professor of military history at Marine Corps Command and Staff College and an officer in the Marine Corps Reserve currently serving with Marine Forces Pacific.
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[1] John F. Kennedy, "Remarks at West Point to the Graduating Class of the U.S. Military Academy," 6 June 1962, JFKL, accessed 10 January 2010.

[2] Session 4, tape 1, Victor H. Krulak, interview with Benis M. Frank, 1973, transcript (Oral History Section, Marine Corps History Division, Quantico, VA), 188, hereafter Krulak oral history.

[3] Inaugural address of President John F. Kennedy, Washington, DC, 20 January 1961, John F. Kennedy Library (JFKL).

activist approach to the Third World would be a defining feature of his presidency.[4] This article examines the U.S. Marine Corps' response to President Kennedy's call for action.[5]

Sometimes referred to as "State Department troops" and "the pointy end of the spear in America's foreign policy," the Marine Corps has long served as Washington's favored instrument for influencing events in the non-European world.[6] During the 150 years preceding Kennedy's inauguration, presidents from Thomas Jefferson to Dwight D. Eisenhower dispatched Marines on more than 100 occasions to achieve foreign policy objectives from Port-au-Prince to Shanghai and many locales in between. The length of these deployments ran from a single day in some instances to nearly two decades in the case of Haiti, with the missions assigned ranging from the hasty evacuation of U.S. citizens to the long-term administration of Caribbean countries. As a maritime nation, the United States repeatedly called on the expeditionary forces of the Marine Corps to project power around the globe and resolve situations that fell in the gray area between diplomacy and formal declarations of war. Thus, when it came to countering communist inroads in the developing world, the Kennedy administration turned, in part, to the Marine Corps for a solution.

Clarifying the relationship between Kennedy, the Marine Corps, and counterinsurgency sheds light on U.S. civil-military relations during a pivotal period of the Cold War. This paper attempts to reconcile competing historiographic interpretations of the Marine Corps' response to counterinsurgency. Some historians have argued that the Marine Corps' small wars heritage and innovative streak made it uniquely suited for counterinsurgency-type missions. Andrew Krepinevich, for example, argued in his now-classic *The Army and Vietnam* that "a history of Marine participation in small wars had given them a background in the type of conflict environment they faced in South Vietnam" where "they put their doctrine into practice."[7] As evidence, most cite the Corps' use of Combined Action Platoons (CAPs), small groups of Marines assigned to live in Vietnamese villages whose primary task was protecting Vietnamese villagers rather than engaging enemy units in combat.[8]

Conversely, other experts contend that the Marine Corps resisted counterinsurgency during the Kennedy era. As a result, it was no more prepared than the other Services when dispatched to Vietnam in large numbers beginning in 1965. Allan Millett, a Marine officer during the Kennedy years and leading authority on the history of the Marine Corps, observed that "the counterinsurgency movement did not budge the Corps from its commitment to amphibious warfare," but for one exception, "no senior Marine general embraced the mission," and that the Marine Corps considered counterinsurgency "Army business."[9] Michael E. Peterson provides a similar perspective in *The Combined Action Platoons: The U.S. Marines' Other War in Vietnam*. Peterson holds that the Marine Corps' preparations, or lack thereof, had little bearing on the Vietnam conflict during the Kennedy years. The Marines employed tactics based on experiences on the ground rather than its small wars history or pre-1965 developments. Peterson argues that the small num-

[4] This essay uses the definition of the *Third World* provided in David S. Painter, "Research Note: Explaining U.S. Relations with the Third World," *Diplomatic History* 19, no. 3 (Summer 1995): 526: "Latin America and the Caribbean; East, South, and Southeast Asia, with the exception of Japan; the Middle East and North Africa, except for Israel; and sub-Sahara Africa." Although nations in this category are diverse, as Painter points out, they share many similarities—poverty, colonial heritage, non-European ethnic origins, and relative poverty—that make the Third World a useful concept for understanding certain aspects of U.S. foreign relations. Other scholars who use a similar framework include Gabriel Kolko, *Confronting the Third World: United States Foreign Policy, 1945–80* (New York: Pantheon Books, 1988); and Odd Arne Westad, *The Global Cold War: Third World Interventions and the Making of Our Times* (New York: Cambridge University Press, 2007), https://doi.org/10.1017/CBO9780511817991.

[5] The author would like to thank Cavender Sutton for providing valuable insights on the topic.

[6] Allan R. Millett, *Semper Fidelis: The History of the United States Marine Corps* (New York: Macmillan, 1980), 261; and Tom Clancy, *Marine: A Guided Tour of a Marine Expeditionary Unit* (New York: Berkley Books, 1996), xi.

[7] Andrew F. Krepinevich, *The Army and Vietnam* (Baltimore, MD: John Hopkins University Press, 1986), 172.

[8] Krepinevich, *The Army and Vietnam*, 172–77. For a discussion of the overall effectiveness of individual CAPs, see Cavender Sutton, " 'To Take Some of that Fear Away': Task Cohesion and Combat Effectiveness Among Combined Action Platoons, 1965–1971," *Marine Corps History* 8, no. 2 (Winter 2022/2023): 90–105, https://doi.org/10.35318/mch.2022080205.

[9] Millett, *Semper Fidelis*, 548.

ber of Marines assigned to CAPs—never more than 2,500 even when total Marines in the country topped 79,000—made Marine counterinsurgency operations in Vietnam "ultimately tokenism."[10] This observation is supported by statistics that show only 1.5 percent of Marines who went to Vietnam served in a CAP.[11]

This article argues that the main reason for these differing interpretations stems from the Marine Corps' failure to commit to any single course of action concerning counterinsurgency, and therein lay a missed opportunity. While refusing to embrace the administration's counterinsurgency program, the Corps' leadership never challenged it directly. Faced with a choice between substantive change and conflict with their civilian principals, they chose a third option: fostering the appearance of compliance while actually changing very little about what they were doing. In the end, this "third way" increased the likelihood that the administration would assign the Marine Corps missions for which it was not adequately prepared. By not offering their best military advice, senior Marines increased the likelihood that the nation would commit resources to an unattainable policy objective—the defeat of a powerful insurgent movement and the preservation of an independent, non-Communist Republic of Vietnam.[12]

Flexible Response and the Counterinsurgency Option

At the strategic level, Kennedy offered the so-called "Flexible Response" strategy as a fundamental shift away from his predecessor's reliance on nuclear deterrence and regional security pacts.[13] Kennedy and his advisors rejected Eisenhower's all-or-nothing approach, known as *massive retaliation*. The new president called for major increases in conventional capabilities. His goal was to produce a balanced military that was able to respond symmetrically across a broad spectrum of possible threats. Flexible Response would allow Washington to counter Soviet aggression with the appropriate level of force wherever and whenever it presented itself. In a speech delivered to Congress shortly after taking office, Kennedy defined the situation as follows:

> The Free World's security can be endangered not only by a nuclear attack but also by being slowly nibbled away at the periphery, regardless of our strategic power, by forces of subversion, infiltration, intimidation, indirect or non-overt aggression, internal revolution, diplomatic blackmail, guerrilla warfare or a series of limited wars.[14]

Only the development and employment of conventional forces could prevent the "steady erosion of the Free World through limited wars." Preparing for such encounters became the "primary mission" of U.S. forces.[15]

For the Marine Corps, the Eisenhower years had been marked by repeated budget cuts and manpower reductions; however, these cuts did not coincide with a similar decrease in operational tempo. The Marine Corps dropped from 225,000 servicemembers in fiscal year 1954 to approximately 170,000 in fiscal year 1960,

[10] Michael E. Peterson provides a similar perspective in *The Combined Action Platoons: The U.S. Marines' Other War in Vietnam* (New York: Praeger, 1989), 123.

[11] Michael Clodfelter, *Vietnam in Military Statistics: A History of the Indochina Wars, 1772–1991* (Jefferson, NC: McFarland, 1995), 252.

[12] Douglas Pike, *PAVN: People's Army of Vietnam* (Novato, CA: Presidio Press, 1986), 212–52. Pike argues that the Communist movement in Vietnam was arguably the most capable insurgency in military history.

[13] At the time, a broad consensus existed in favor of a doctrinal shift. For a representative example of the military perspective, see Gen Maxwell D. Taylor, *The Uncertain Trumpet* (New York: Harper and Brothers, 1960). For examples of contemporary academic contributions to the subject, see Henry Kissinger, *The Necessity for Choice: Prospects of American Foreign Policy* (Garden City, NY: Anchor Books, 1962); and Robert E. Osgood, *Limited War: The Challenge to American Security* (Chicago: University of Chicago Press, 1957). Richard A. Aliano's *American Defense Policy from Eisenhower to Kennedy: The Politics of Changing Military Requirements, 1957–1961* (Athens: Ohio University Press, 1975) serves as perhaps the best single volume on the transition from the New Look to Flexible Response. Informative accounts can also be found in Russell F. Weigley, *The American Way of War: A History of United States Military Strategy and Policy* (Bloomington: Indiana University Press, 1973), chaps. 17–18; John Lewis Gaddis, *Strategies of Containment* (New York: Oxford University Press, 2005), chaps. 5–8; and Allan R. Millett and Peter Maslowski, *For the Common Defense: A Military History of the United States of America* (New York: Free Press, 1994), chap. 16.

[14] John F. Kennedy, "Special Message to Congress on the Defense Budget," 28 March 1961, *American Presidency Project*, Santa Barbara, CA, accessed 10 January 2010.

[15] Kennedy, "Special Message to Congress on the Defense Budget." The term *limited war*, as used during the 1950s and 1960s, was an umbrella term used to describe the many variations of non-nuclear armed conflict.

a reduction of nearly 25 percent. During the same period, its annual budget decreased by approximately 15 percent from $1.097 billion to $902 million. The reductions necessitated the deactivation of six battalion landing teams (the Corps' primary expeditionary units), slowed the adoption of the helicopter, and resulted in drastic cuts in the supporting establishment. However, while the administration was cutting the Service's budget, it also dispatched Marines to deal with several Cold War–related crises. Such missions included the evacuation of refugees from North Vietnam in 1954, the evacuation of noncombatants during the Suez crisis in 1956, landings in Lebanon and Taiwan in 1958, and maintaining a significant presence in the Caribbean both during the Central Intelligence Agency-assisted ouster of Guatemalan president Jacobo Arbenz in 1954 and following Fidel Castro's overthrow of the U.S.-supported Fulgencio Batista government in 1959.[16]

To remedy this deficiency, the Kennedy administration made strengthening the Marine Corps one of its first steps in implementing Flexible Response. In a special message delivered before a joint session of Congress on 25 May 1961, he requested $60 million to modernize the Corps' equipment and to increase its end strength to 190,000. According to the president, the Corps would use these funds "to enhance the already formidable ability of the Marine Corps to respond to limited war emergencies" as well as its "initial impact and staying power." References to Soviet support for Third World "subversives and saboteurs and insurrectionists" highlighted the urgent need for such expenditures.[17] This initial request were the first of many budget increases received by the Corps during the Kennedy years. Although the administration held fast to the manpower ceiling of 190,000, funds allocated for research and development, operations, and maintenance increased to levels not seen since the Korean War.[18]

In Millett's opinion, "Flexible Response could not have been a more congenial strategy for the Corps."[19] He cited Commandant Wallace M. Greene, who reported in 1965 that "the Marine Corps is in the best condition of readiness that I have seen in my thirty-seven years of naval service."[20] Several key figures from the period expressed similar sentiments. For example, Brigadier General Edwin H. Simmons, another participant turned trained historian, described the Kennedy era as the period in which the Marine Corps attained its "highest peacetime level of effectiveness"—a level not seen again until the 1980s.[21] However, there was one crucial component of Flexible Response that the Marine Corps did not find so congenial: counterinsurgency.

To prevent the spread of Communism in the Third World, the Kennedy administration pursed the complementary concepts of economic modernization and counterinsurgency.[22] Advocates of modernization theory argued that the United States could guide developing nations in their development process and build states able to meet the needs of their populations without turning to socialism or Communism.[23] According to official policy statements, by focusing on economic development the Kennedy administration would emerge victorious in "the contest between communism and the Free World for primary influence over the direction and outcome of the development process."[24] However, with Communist insurgencies ac-

[16] Millett, *Semper Fidelis*, 519, 533, 538.
[17] President John F. Kennedy, "Special Message to the Congress on Urgent National Needs," 25 May 1961, JFKL.
[18] Millett, *Semper Fidelis*, 548.
[19] Millett, *Semper Fidelis*, 547.
[20] Millett, *Semper Fidelis*, 558.
[21] Edwin H. Simmons, *The United States Marines: A History* (Annapolis, MD: Naval Institute Press, 1998), 216.
[22] U. Alexis Johnson, "Internal Defense and the Foreign Service," *Foreign Service Journal* 39, no. 7 (July 1962): 21.
[23] W. W. Rostow, "Guerrilla Warfare in Underdeveloped Areas," speech reprinted in LtCol T. N. Greene, ed., *The Guerrilla—and How to Fight Him: Selections from the Marine Corps Gazette* (New York: Praeger, 1962), 56. See W. W. Rostow, *The Stages of Economic Growth: A Non-Communist Manifesto* (New York: Cambridge University Press, 1960), https://doi.org/10.1017/CBO9780511625824.
[24] "U.S. Overseas Internal Defense Policy," 24 August 1962, Meetings and Memoranda, box 319, "Special Group CI," JFKL. For a comprehensive account of the influence of modernization theory on Kennedy's foreign policy, see Nils Gilman, *Mandarins of the Future: Modernization Theory in Cold War America* (Baltimore, MD: Johns Hopkins University Press, 2003); and Michael E. Latham, *Modernization as Ideology: American Social Science and "Nation Building" in the Kennedy Era* (Chapel Hill: University of North Carolina Press, 2000).

tive throughout the Third World, the administration needed to protect its development projects against internal security threats. According to Secretary of State Dean Rusk, by applying counterinsurgency doctrine, the U.S. military would serve as the "guardians of the development process."[25] Of the relationship between modernization and counterinsurgency, Rusk offered:

> Our strategy is therefore two-fold and interacting: We must encourage the less-developed countries to move forward on their own as smoothly as possible and we must simultaneously assist in defending them against the threat of subversion.[26]

To be successful, counterinsurgency necessitated "a novel approach" and "a shift in emphasis and direction affecting the entire foreign affairs apparatus."[27] The novelty of the approach—known today as population-centric counterinsurgency—was evident in its focus on "winning the hearts and minds" of the host nation's populace as the primary objective, not defeating enemy forces on the field of battle. It necessitated a fundamental adjustment in how military leaders prepared for operations. During a West Point speech, President Kennedy notified the military, saying, "If freedom is to be saved," the armed forces would have to develop "a whole new kind of strategy, a wholly different kind of force, and therefore a new and wholly different kind of military training."[28] Although the president expected indigenous forces to bear the brunt of any combat, American servicemen could expect to risk their lives "as instructors or advisers, or as symbols of our Nation's commitments."[29] Consequently, the U.S. military's preparation for counterinsurgency warfare emerged as key to achieving the flexibility required by Flexible Response.

Although the administration disseminated guidance on counterinsurgency beginning in early 1961, in mid-1962 it issued its formal doctrine on the subject, "U.S. Overseas Internal Defense Policy."[30] The policy articulated the roles and missions of all subordinate agencies and was designed to serve as the foundational document for all counterinsurgency efforts. While it reaffirmed that nation-building was primarily a civilian undertaking, it tasked the military with "assisting selected developing countries to attain and maintain military security" against "external and internal threats."[31] Although indigenous troops were expected to do much of the actual fighting, the policy stipulated that "U.S. Forces may become operational" if an insurgency grew to "serious proportions."[32] Barring such cases, the administration expected the military to develop the doctrine, tactics, techniques, and procedures for counterinsurgency warfare. Furthermore, they were to make appropriate adjustments to their training, logistics, and research and development programs to ensure a high state of readiness for such contingencies. Lastly, they were to provide trained personnel to serve as advisors for foreign forces.

As with Flexible Response, the administration envisioned an important role for the Marine Corps in its plans for counterinsurgency. On numerous occasions, Kennedy expressed his affinity for the Corps and its ability to fight "brush-fire wars" in the Third World.[33] As mentioned above, he made a case for increased funding for the Corps based on its efficacy in putting down guerrilla uprisings.[34] The Service's history, high level of readiness, and expeditionary nature led the administration to conclude that the Corps would be a valuable instrument for executing the counterinsurgency option, along with Army Special Forces.

[25] Dean Rusk, "Problems of Development and Internal Defense," *Foreign Service Journal* 39, no. 7 (July 1962): 6. The journal reproduced an excerpt of Rusk's 11 June 1961 speech delivered at the opening of the Foreign Service Institute's "Country Team" seminar.
[26] Rusk, "Problems of Development and Internal Defense," 6.
[27] Douglas S. Blaufarb, *The Counterinsurgency Era: U.S. Doctrine and Performance, 1950 to the Present* (New York: Free Press, 1977), 67.
[28] Kennedy, "Remarks at West Point to the Graduating Class of the U.S. Military Academy."
[29] Kennedy, "Remarks at West Point to the Graduating Class of the U.S. Military Academy."
[30] "Overseas Internal Defense Policy," 23.
[31] "Overseas Internal Defense Policy," 23.
[32] "Overseas Internal Defense Policy," 23.
[33] John F. Kennedy, "Remarks of Senator John F. Kennedy at Luncheon Meeting, Mauston, Wisconsin," 9 March 1960, JFKL, accessed 10 January 2010
[34] Kennedy, "Special Message to Congress," 25 May 1961.

Events, however, would prove otherwise. The Marine Corps' senior leaders failed to embrace the counterinsurgency mission. Nor did they develop the "new kind of strategy" and "wholly different kind of force" Kennedy envisioned.[35] The principal liaison between the uniformed Services and the civilian administration for counterinsurgency, Major General Victor H. Krulak, later recalled, "Of all the services . . . the Marines were the most obtuse of all." Rather than make substantive changes, "they paid the President of the United States lip service."[36] Why did the Marine Corps resist an initiative with so much high-level attention? And how did it fail to make major changes while remaining in the administration's good graces?

The Marine Corps' Small Wars Tradition

Based on his reading of Marine Corps history, Kennedy believed the Corps would respond favorably to his call for action. The Corps' leaders reinforced this belief. They often presented the Marine Corps' small wars tradition as evidence of why, as an organization, it was already prepared for counterinsurgency and did not need to make any major changes. Of note, one of the first pieces of correspondence from the Marine Corps to the White House, sent less than a month after Kennedy's inauguration, cites expeditionary operations dating back to the Bahamas in 1776, as well as past successes working with "indigenous people of another color" as evidence of its readiness for "any assignment . . . anywhere in the world."[37] Yet, these same leaders, notably Commandant David M. Shoup, were suspicious of nation-building missions due in part to their pre–World War II service as colonial police. These reservations, however, were not mentioned in the official correspondence.

To appreciate the Marine Corps' selective presentation, one must examine its small wars tradition. Between the Spanish-American War of 1898 and President Franklin D. Roosevelt's inauguration in 1933, Marines intervened in the internal affairs of foreign nations on more than 20 occasions. Of these, the armed occupations of Haiti (1915–34), the Dominican Republic (1916–24), and Nicaragua (1926–33) are the most relevant to the present discussion.

President Woodrow Wilson sent the Marines in the first two cases to restore law and order and protect U.S. lives and economic interests. However, Marine forces in Haiti and the Dominican Republic quickly found themselves performing various civil functions for which they had received little guidance or training. In addition to the military-specific tasks of training indigenous security forces and fighting insurgents, responsibilities included supervising infrastructure projects, reforming the education system, promoting effective governance, and a host of other administrative and economic functions. Similarly, the Corps' 1926 deployment to Nicaragua, although not infused with Wilsonian idealism, saw Marines deeply involved in a guerrilla war that had far more to do with domestic Nicaraguan politics than U.S. interests.[38] The fact that Marines had been involved in Nicaragua's internal affairs almost continuously from 1910 no doubt contributed to the air of pessimism surrounding such expeditions. An internal study of the Corps' Nicaragua experience released in 1958, which drew heavily on contemporary reports and participants' accounts, clarified that while Marines could protect lives and property in the short term, their ability to influence internal politics in foreign nations was limited. Efforts to do so often resulted in widespread anti-Americanism.[39]

[35] Kennedy, "Remarks at West Point to the Graduating Class of the U.S. Military Academy."
[36] Krulak oral history, 188.
[37] W. M. Greene to naval aide to the president, "Marine Corps Experience and Capability in the Conduct of Guerrilla and Anti-guerrilla Type Operations," 13 February 1961, President's Office Files, 1961–1963, box 98, "Counterinsurgency," JFKL.

[38] Lester Langley, *The Banana Wars: United States Intervention in the Caribbean, 1898–1934* (Wilmington, DE: S. R. Books, [1983] 2002); and *Whitney T. Perkins, Constraint of Empire: The United States and Caribbean Interventions* (Westport, CT: Greenwood Press, 1981). For accounts that include the U.S. military's experiences in Asia as well, see Max Boot, *The Savage Wars of Peace: Small Wars and the Rise of American Power* (New York: Basic Books, 2002); and Richard Millett, *Searching for Stability: The U.S. Development of Constabulary Forces in Latin American and the Philippines*, Occasional Paper 30 (Fort Leavenworth, KS: U.S. Army Combat Studies Institute, 2010).
[39] Bernard C. Nalty, *Marine Corps Historical Reference Series: The United States Marines in Nicaragua* (Washington, DC: Historical Branch, G-3 Division, Headquarters Marine Corps, 1958).

From this period, three criticisms emerged that would color subsequent debates in the 1960s. First, sustained operations ashore and long-term occupation duty consumed a significant portion of the Service's manpower. While the number of Marines deployed to each country appears small by current standards (seldom more than 2,000 personnel), it is important to note that excluding the build-up associated with the First World War, the pre–World War II Marine Corps was comparable in size to the New York City Police Department.[40] With two-thirds of its roughly 20,000 Marines serving abroad at various points in the 1920s, the Corps found it difficult to do much of anything else. For example, the large number of Marines engaged in constabulary duty complicated the mobilization process during the First World War. More importantly, it slowed efforts to plan and train for a possible war against Japan in the Pacific, an eventuality that some were predicting as early as 1920.[41] Thus, small wars detracted from the Marine Corps' readiness to meet more substantial threats to the nation's security.

Second, these missions were often thankless tasks, with Marines left to administer foreign countries long after the general public lost interest and the politicians who had sent them died or left office. On the one hand, Marines were criticized for being heavy-handed tools of U.S. expansion, while on the other, they were given little support and then disparaged for having not done enough. Policymakers expected the Marines to bring about major structural changes and were often dissatisfied when this failed to occur.[42] Consequently, one of the key takeaways was that while expectations were high in these types of missions, actually effecting change in a country's social, economic, and political fabric was incredibly difficult, if not impossible. Furthermore, civil and diplomatic tasks were not something that Marines were trained for nor did they receive adequate support from other departments and agencies.[43] Compared to the Marine Corps' experiences in the two world wars—praised in the press and fêted on their return—it is not surprising that the Corps' senior leaders were less enthusiastic about reliving the Banana Wars years.

Third, senior Marines' experiences as colonial police led some senior Marines to question the motivations behind these missions. Major General Smedley Butler was arguably the most famous and outspoken of the critics. After retiring in 1931, the two-time Medal of Honor winner summarized his foreign service as follows:

> I spent 33 years . . . in active military service and during that period I spent most of my time as a high class thug for Big Business. . . . I was a racketeer, a gangster for capitalism. I helped make Mexico and especially Tampico safe for American oil interests in 1914. . . . I helped make Honduras "right" for the American fruit companies in 1903. . . . Looking back on it, I might have given Al Capone a few hints. The best *he* could do was to operate his racket in three districts. I operated on three *continents*.[44]

While Butler was an extreme case, he was not the only Marine with misgivings regarding the missions they were assigned. In comparison, one would be hard-pressed to find a similar tract written by a veteran of World War II.

However, the Marine Corps' small wars tradition was not entirely negative. Most, if not all, of the se-

[40] Simmons, *The United States Marines*, 121. The author cites 1939 as a case in point, a year in which both organizations had approximately 18,000 men on the payrolls.

[41] Millett, *Semper Fidelis*, 261; and Earl H. Ellis, *Operation Plan 712J—Advanced Base Operations in Micronesia*, 23 July 1921, Ellis biographical file, Marine Corps History Division (MCHD), Quantico, VA.

[42] For examples of the criticism and praise Marines received at the time, see Emily Greene Balch, *Occupied Haiti* (New York: Writers Publishing, 1927); and Carl Kelsey, "The American Intervention in Haiti and the Dominican Republic," *Annals of the American Academy of Political and Social Science* 100, no. 1 (March 1922): 166–202.

[43] Millett, *Semper Fidelis*, chaps. 7 and 9.

[44] MajGen Smedley D. Butler, "America's Armed Forces, 2: 'In Time of Peace'—The Army," *Common Sense* 4, no. 11 (November 1935): 8. See Smedley D. Butler, *War Is a Racket* (New York: Round Table Press, 1935); and Hans Schmidt, *Maverick Marine: General Smedley D. Butler and the Contradictions of American Military History* (Lexington: University of Kentucky Press, 1987).

nior officers credited with major victories in World War II and the Korean War, including Generals Alexander A. Vandegrift, Holland M. Smith, and Lewis "Chesty" B. Puller, learned valuable lessons in combat leadership during these campaigns. Furthermore, although chiefly focused on developing its amphibious capabilities for a possible war with Japan, in the late 1930s, the Marine Corps codified its "lessons learned" from the era in *The Small Wars Manual* (1940).[45] Considered a seminal document in modern counterinsurgency theory, the manual, much like Kennedy's "Internal Defense Policy," reinforced the importance of nonmilitary factors in counterinsurgency: "The solution of such problems being basically a political adjustment, the military measures to be applied must be of secondary importance and should be applied only to such an extent as to permit the continuation of peaceful corrective measures."[46] In fact, most issues are "completely beyond military power" to remedy.[47] Rather, long-term stability lay in the application of economic and diplomatic means to remedy the underlying causes of subversive movements, typically a lack of representative government and economic inequality.[48] With the onset of World War II, the manual fell into disuse.

As mentioned above, in the early 1960s, senior Marines often referenced the Corps' history and the manual as evidence of its preparedness for counterinsurgency. By that time, however, only a handful of senior officers and enlisted personnel still on active duty had participated in these operations. The vast majority had gained their combat experience in the conventional battles of World War II and Korea. Mention of the manual was similarly disingenuous since it had been out of print for years and was not part of the curriculum being taught to junior officers. Copies were so scarce that in 1962 an officer at Marine Corps Headquarters had difficulty locating one.[49] Along these same lines, Colonel John Greenwood, an officer tasked with conducting counterinsurgency in Vietnam, recalled that the entirety of his "guerrilla warfare expertise" was instilled through contemporary U.S. Army courses and on-the-job training, "not from Marine Corps experience 30 years previous."[50]

According to Michael Peterson, a veteran and historian of the Marine Corps' Vietnam-era counterinsurgency efforts, by the early 1960s, the Marines had "become complacent about their counterinsurgency capabilities" and "turned their backs on their own traditions."[51] General Krulak supported Peterson's conclusions and summarized the collective Marine Corps' response to counterinsurgency: "Hell, we've been to Nicaragua, we know all about that jazz. We don't need any special individual (counterinsurgency expert) in our outfit."[52] The fact that the leading proponent of this view was no less than the Commandant, General David M. Shoup, further complicated the relationship between the White House and the Marine Corps when it came to counterinsurgency.

A Medal of Honor recipient and one of Kennedy's favorite military advisors, General Shoup made no secret about his belief that counterinsurgency required no major adjustments on the part of the Marine Corps, often using history to make his case.[53] Shoup later recalled telling the president that with the help of maybe an interpreter and a radio operator, any "Marine or Army squad, properly trained for what they're supposed to be able to do . . . could do

[45] *Small Wars Manual* (Washington, DC: Headquarters Marine Corps, 1940). For a historical account of the development of the manual, see Keith B. Bickel, *Mars Learning: The Marine Corps' Development of Small Wars Doctrine, 1915–1940* (Boulder, CO: Westview Press, 2001).
[46] *Small Wars Manual*, 16.
[47] *Small Wars Manual*, 16.
[48] *Small Wars Manual*, 18–22.

[49] R. E. Bearde to R. Rocheford, 29 March 1962, Greene Papers, box 104, "Correspondence," Archives, MCHD.
[50] Quoted in Michael E. Peterson, *The Combined Action Platoons: The U.S. Marines' Other War in Vietnam* (New York: Praeger, 1989), 18. In this work, Peterson, a veteran of the Marine Corps' counterinsurgency effort in Vietnam, provides a scholarly account of the subject with insights gained from his own experiences.
[51] Peterson, *The Combined Action Platoons*, 124.
[52] Krulak oral history, 188.
[53] Theodore Sorenson, *Kennedy* (New York: Harper and Row, 1965), 607. Shoup was also the only Service chief to serve for the entirety of Kennedy's presidency. In Robert Sherrod, "General David M. Shoup, 1904–1983," *Obituary*, 15 August 1983, Shoup biographical file, MCHD, the author, who first met Shoup as a war correspondent on Tarawa, recalled numerous occasions in which Kennedy expressed his deep respect for Shoup.

any anti-guerrilla job that there was to do."[54] A published interview supports the account the general gave in 1963 and his testimony before the House Armed Services Committee that same year.[55] Asked to comment on counterinsurgency, Shoup responded:

> Hell, we've been pioneers in it—in anti-guerrilla warfare that is. That's what all the talk is about. And as I said, we've been doing that since the days of the Banana Wars in Central America. . . . Any Army or Marine squad properly trained in small-unit actions can make a damn good showing in that kind of warfare.[56]

As this statement suggests, many Marines continued to view counterinsurgency in terms of identifying and capturing or killing antigovernment forces. It also shows that Marines post–World War II expected counterinsurgency operations to be similar to the Banana Wars, despite obvious differences. The revolutionary and nationalist ideas sweeping through the Global South combined with support from the Soviet Union and China made Cold War insurgencies much more difficult to defeat, especially by an outside power. Unconventional warfare had changed in important ways that many Marines failed to fully grasp.

Here, it is important to note the challenges presented by doctrinal ambiguity and unclear and inconsistent terminology. Civilian officials in the Kennedy administration were inclined to view counterinsurgency as what today would be referred to as *population centric counterinsurgency*. This approach, best articulated by French officer and military theorist David Galula, held that the best way to defeat an insurgency was to focus on the population by providing security, economic development, and government services. In this way, the government would become increasingly popular and the insurgency would grow weaker.[57] Military officers, on the other hand, tended to understand *counterinsurgency* more through the lens of direct military action. Here, the work of Roger Trinquier, a French officer and contemporary of Gallula, best captures this viewpoint. Trinquier argued that the best approach was to directly target insurgent networks through a cycle of intelligence collection and military raids.[58] Discussions of *partisan warfare*, sometimes referred to as *guerrilla warfare*, muddied the waters even further. In 1961, for example, Otto Heilbrunn published *Partisan Warfare*, a study of irregular warfare behind enemy lines in China, the Soviet Union, and Yugoslavia during World War II.[59] Heilbrunn, like Trinquier, focused more on military rather than civil activities, though with more attention on irregular activities against conventional military forces. In hindsight, it would have been helpful had key leaders agreed on a common set of terms. The general lack of doctrinal clarity and the newness of the topic allowed for key actors to define *counterinsurgency* in different ways—ways that often suited their own purposes.

Some of Shoup's resistance to any major adjustments also stemmed partly from the fact that he was one of the few Marines still on active duty who had participated in the policing actions of the 1920s. A journal Shoup kept while serving in Shanghai and Tientsin, China, in the late 1920s provides some insight into his thinking in this regard. He recorded seeing American missionaries, businessmen, and diplomats exploiting the Chinese people in one way or another.[60] He also documented a meeting with General Butler who referred to the expedition, or "Exhibition," as Shoup preferred to call it, as a "commercial war."[61] In addition to registering his disgust at the dis-

[54] David M. Shoup, interview with Joseph E. O'Connor, 7 April 1967, John F. Kennedy Library Oral History Program, 26, hereafter Shoup 7 April 1967 interview.
[55] Robert Leckie, "Raring, Tearing, Cussing, Swearing United States Marine," *Saga* 25, no. 6 (March 1963); and Testimony of Gen D. M. Shoup, House Armed Services Committee Hearings, "Defense Appropriations F.Y. 1964," Shoup biographical file, MCHD.
[56] Leckie, "Raring, Tearing, Cussing, Swearing United States Marine," 74.
[57] David Galula, *Counterinsurgency Warfare: Theory and Practice* (Westport, CT: Praeger Security International, 2006 [1964]).
[58] Roger Trinquier, *Modern Warfare: A French View of Counterinsurgency* (Fort Leavenworth, KS: U.S. Army Combat Studies Institute, 1985 [1961]).
[59] Otto Heilbrunn, *Partisan Warfare* (London: Routledge, 1962).
[60] David M. Shoup, *The Marines in China, 1927–1928: The China Expedition which Turned out to Be the China Exhibition—A Contemporaneous Journal*, ed. Howard Jablon (Hamden, CT: Archon Books, 1987), 81.
[61] Shoup, *The Marines in China, 1927–1928*, 110.

respect shown to local Chinese by many foreigners, the young Shoup was also surprised and disillusioned by the fact that he was part of a costly operation to protect Americans overseas who were reaping considerable profits without the burden of paying taxes.[62]

Thus, General Shoup's and the Marine Corps' selective use of history to resist counterinsurgency-related change was disingenuous and a lost opportunity. By highlighting tactical successes without reexamining and presenting the strategic shortcomings and inconsistencies, the Marine Corps' actions made it all the more likely that it would be tasked with similar missions in the future. As the subject matter experts regarding expeditionary operations, the organization's leaders owed the administration a complete picture incorporating analysis on multiple levels. The Marine Corps' statements on the topic of counterinsurgency led the administration to believe it had more military capability in this mode of warfare than it actually did. Perhaps a deeper understanding of the Banana War era would have tempered Kennedy's enthusiasm for nation-building and counterinsurgency. Ultimately, the Marine Corps' use of history gave the impression that counterinsurgency was a viable option that it was fully prepared to implement. The Corps' party line was Marines had done it before and could do it again.

The Marine Corps Concept

To explain General Shoup's resistance to counterinsurgency more fully, it must be remembered that he, like Kennedy, entered office with a clear vision of where he wanted to take the Marine Corps. The fact that Eisenhower appointed him on 1 January 1960 gave him a one-year head start. A distinguished combat veteran known to the general public for his famous situation report at Tarawa—"Casualties many; percentage of dead not known; combat efficiency: We are winning"—Shoup was chosen over nine more-senior generals, several of whom promptly retired.[63] Having performed admirably in several key billets, he impressed the Eisenhower administration with his dogged approach to efficiency and readiness. Coming on the heels of the uninspired commandancy of General Randolph Pate and the organizational turmoil of the 1950s, Eisenhower selected Shoup to effect change.[64]

In line with the thinking of most senior Marines, Shoup firmly believed that the primary purpose of the U.S. Marine Corps was amphibious operations, primarily amphibious assaults, but also raids, withdrawals, and demonstrations. The Corps' amphibious focus was validated in World War II and Korea and written into law by Congress. As Commandant, Shoup's overarching goal was to continue to develop the Fleet Marine Force for rapid worldwide amphibious operations. As outlined in the National Security Act of 1947, the primary mission of the Marine Corps was to prepare for and execute amphibious landings. Although the act also tasked the Service with carrying out any other duties that the president may direct, the idea of being the nation's amphibious force in readiness so permeated the Corps' collective identity that it can rightly be referred to as the Marine Corps Concept.[65] During congressional testimony given shortly after he assumed the commandancy, Shoup defined his mission as ensuring that his Service was "prepared at all times to participate anywhere in any kind of warfare."[66] Called before Congress again

[62] Shoup, *The Marines in China, 1927–1928*, 110.
[63] Sherrod, "General David M. Shoup, 1904–1983," 3.
[64] In Don Schanche, "Return of the Old Breed," *Esquire* (January 1961), the author provides a detailed contemporary critique of the "morale-sapping effects" of Shoup's predecessor. Gen Pate's commandancy was plagued by internal dissension over personnel policies, the mishandling of the Ribbon Creek incident at the Marine Corps Recruit Depot Parris Island, SC, and a general lack of direction from Headquarters Marine Corps. In contrast, Shoup was widely recognized as a determined and respected leader and, in the opinion of war correspondent Robert Sherrod, a "tough Marine Officer in the best tradition." In Sherrod, "General David M. Shoup, 1904–1983," the author quotes Wallace Greene (then Shoup's second in command): "There can be no doubt that Shoup was a tough and brutal individual," but "his type was needed at this time. . . . *Truly a great man*," (emphasis original), 5.
[65] The idea of a Marine Corps Concept is borrowed from Brian McAllister Linn, *The Echo of Battle: The Army's Way of War* (Cambridge, MA: Harvard University Press, 2007). According to Linn, "a military institution's concept of war is a composite of its interpretation of the past, its perception of present threats, and its prediction of future hostilities. It encompasses tactics, operational methods, strategy, and all other factors that influence the preparation for, and conduct of, warfare" (p. 233). See also Krepinevich, *The Army and Vietnam*.
[66] David M. Shoup, "Statement Before the House Armed Services Committee," 27 January 1960, Shoup biographical file, MCHD.

in March 1961, he referred to amphibious forces as "a unique weapon" that "we have and our potential enemies do not." It was a "weapon for policy, for cold war, for little war, for big war. The weapon that allows us to project American power anywhere in the world and to whatever degree may be directed."[67] Statements such as these, combined with Shoup's efforts to prepare the Marine Corps to respond to a broad spectrum of possible contingencies, made him a favorite of the Kennedy administration. Thus, the Marine Corps Concept seemed the perfect complement to Flexible Response.

Two key elements of Shoup's program—readiness and mobility—illustrate the synergy that existed between the White House and Marine Corps Headquarters during the Kennedy era. With regard to the former, the Commandant's efforts touched all aspects of the organization: manpower was shifted from the supporting establishment to the operating forces; equipment was modernized; the Reserve component was reformed so that more reservists could be called up faster; and individual and unit training was enhanced to account for a wider range of conflict environments, including extreme temperatures and terrain. The Commandant also paid close attention to forward-deployed units in strategic positions around the world, with the goal of ensuring the appropriate mix of forces needed to respond to a range of crises.

Of note, the concept of the Marine-Air Ground Task Force was refined during Shoup's tenure. This building-block approach enabled the Marine Corps to rapidly dispatch task forces, comprised of anywhere from 1,000 to 50,000 Marines along with supporting assets, for extended operations ashore. The end result, in Shoup's opinion, was "a highly flexible and precise weapon" ready to respond to anything from "a brush fire to a major conflict."[68]

In the area of mobility, the Commandant acted on multiple levels. To improve its tactical mobility and operational reach, the Marine Corps pioneered the use of helicopters to carry Marines to the fight, a concept known as vertical assault. While efforts to adapt the helicopter to military use began in earnest in the 1940s, the combination of Shoup's leadership and Kennedy's increased funding provided a boost to such programs. Similarly, to enhance strategic mobility, the Commandant pressured the Navy to modernize its amphibious shipping both to increase lift and accommodate the helicopter. A staunch advocate of the balanced fleet concept, Shoup made a case for amphibious task forces being just as relevant as nuclear submarines and aircraft carriers; the Navy had to be ready to fight in the littorals as well as the open ocean. Thus, modern amphibious shipping capable of carrying helicopter-mobile Marine units enabled the projection of U.S. naval power farther inland than had been previously possible.

The Academy Award-winning 1961 documentary *A Force in Readiness* provided a visual representation of the Marine Corps Concept.[69] Written and produced by the Service, the film presents the Navy-Marine Corps team as a versatile tool for responding to global crises. Interestingly, the film makes no mention of counterinsurgency, even though it mentions the Service's tactical nuclear capabilities. Approximately 50 percent of the film shows Marines employing direct or indirect fire weapons. While readiness is the overarching theme of the film, the focus is clearly on readiness for conventional conflicts rather than unconventional missions. Since the General Robert E. Hogaboom Board of 1957, the Corps claimed to be working toward building a multipurpose force capable of responding to insurgencies and mid- or high-intensity conflict. However, as the film demonstrates, the Service focused its energies on the latter with an emphasis on building an amphibious force with air-mobile capabilities for employment against conventional opponents.

[67] David M. Shoup, "Statement Before the House Armed Services Committee," 13 March 1961, Shoup biographical file, MCHD.

[68] David M. Shoup, "Statement Before the House Armed Services Committee," 13 March 1961, Shoup biographical file, MCHD. See also David M. Shoup, "The Commandant's Views, Designs and Policies: Guidance for Thee in 1963," *Marine Corps Association Newsletter* 47, no. 2 (February 1963); and David M. Shoup, "Statement Before the Armed Services Committees of the U.S. Senate and House of Representatives," 1963, Shoup biographical file, MCHD.

[69] "U.S. Marine Corps, 'A Force in Readiness' 1961 Recruiting Film w/Jack Webb 24984," accessed 7 July 2022, video on YouTube, 25:35.

Viewed collectively, Shoup's efforts gave the administration the flexibility and versatility it had requested. By 1963, most observers agreed that he had come through on his pledge to be able to put better-trained Marines in more locations faster than ever before.[70] The Cuban Missile Crisis of October 1962 validated the efforts of both Kennedy and Shoup. If Fidel Castro's rise to power and the botched Bay of Pigs invasion symbolized the deficiencies inherent in the New Look's overreliance on nuclear weapons, the peaceful resolution of the crisis of 1962 represented a signal achievement for devotees of Flexible Response. The Corps' efforts to enhance combat readiness also bore fruit. In a matter of days, 45,000 Marines were deployed in the vicinity of Cuba for a possible invasion. While nuclear war was averted by the gradual application of military force in combination with diplomatic initiatives, had it been necessary, Kennedy had at his disposal a potent amphibious assault force. In Shoup's opinion, the Corps' "prompt, certain reaction" was the "most efficient and professional" in its history and a testament to the "responsiveness of Marine forces to rapidly-evolving crisis."[71] Thus Flexible Response, of which the Marine Corps' combat readiness was a key component, provided the president with a range of options from which to select to prevent the outbreak of war. Kennedy's focus on conventional forces had paid off.

This success and other initiatives that seemed the perfect complement to Flexible Response obscured disconnects between Shoup and the administration over counterinsurgency. Furthermore, the same Marine Corps Concept that was so appealing to Kennedy also helps explain both the why and the how behind Shoup's resistance to counterinsurgency. As evidenced by its approach to vertical assault, the Marine Corps had a well-deserved history of being innovative and adaptable. Advances, however, tended to occur within the broader framework of the concept. During the early 1960s, enduring commitments such as nation-building and counterinsurgency were at odds with Shoup's and the Marine Corps' long-term organizational goals.

Shoup's feelings on the relationship between counterinsurgency and amphibious readiness were most evident concerning Vietnam. Although Marine advisors had been serving in Vietnam for years and a helicopter detachment had been dispatched to the country in April 1962, the Commandant sought to limit Marine involvement. Instructions he sent to a subordinate commander, General Wallace M. Greene, the Marine Corps Chief of Staff, stated that Shoup wanted the commander to resist calls for more Marines in Vietnam because such commitments reduced the overall combat readiness of parent units.[72] Similarly, a staff officer, Edwin H. Simmons, vividly recalled the Commandant's feelings on the matter: "We don't want to piss away our resources in that rat hole."[73] After a personal visit in 1962, Shoup returned to Washington with "no doubt . . . that we should not, under any circumstances, get involved in land warfare in Southeast Asia."[74] For Shoup, not only were communist, anticolonial movements especially powerful, but countering these movements long-term was the job of land forces, not the nation's amphibious force in readiness.

Pessimistic reports from his advisors in the field also crossed General Shoup's desk during this period. One officer serving as an advisor in Vietnam reported to Headquarters Marine Corps, "Until we face up to the fact that we can't solve by military manipulation and money the problems that are generated by sociological/economic/political factors, I'm afraid we

[70] See Millett, *Semper Fidelis*, chap. 17, for a detailed description of the programs and policies mentioned.
[71] David M. Shoup, "The Building of a Force-in-Readiness," 1963, speech file, Shoup biographical file, MCHD.
[72] W. M. Greene to D. M. Weller, 25 January 1963, Greene Papers, box 106, "Personal Correspondence," Archives, MCHD.
[73] Edwin H. Simmons, interview with Howard Jablon, 27 February 1980, quoted in Howard Jablon, "General David M. Shoup, U.S.M.C.: Warrior and War Protester," *Journal of Military History* 60, no. 3 (July 1996): 527. Jablon is also the author of the only book-length biography of Shoup: Howard Jablon, *David M. Shoup: A Warrior against War* (Lanham, MD: Rowman and Littlefield, 2005). While informative, as part of the Biographies in American Foreign Policy series, much of the book's 117 pages address U.S. foreign policy in general rather than Shoup specifically. Jablon also authored "David Monroe Shoup," in Allan R. Millett and Jack Shulimson, *Commandants of the Marine Corps* (Annapolis, MD: Naval Institute Press, 2004), 362–81.
[74] Shoup 7 April 1967 interview, 35.

aren't going to make much headway in our struggle for the minds of the people."[75] Counterinsurgency missions could morph into resource-intensive undertakings, thereby making the United States less ready if an existential threat emerged. The open-ended commitments called for in the U.S. Overseas Internal Defense Policy failed to resonate with a Commandant who favored quick, decisive action over ill-defined nation-building campaigns.

At the same time, however, Shoup's steadfast pursuit of combat preparedness and versatility, combined with the Corps' timely response to the Cuban Missile Crisis, made it difficult for the administration to find fault with his stewardship of the Marine Corps. Shoup had to prioritize his efforts in readying his organization for an uncertain future threat environment. Were it not for the escalation in Vietnam, his inattention to counterinsurgency probably would have gone unnoticed. Counterfactuals aside, what is important is that a disconnect between civilian policymakers and their military subordinates is not always the result of an adversarial relationship or opposed points of view. The most difficult disconnects to detect occur when actors are otherwise in near-total agreement with one another. Although he repeatedly minimized the importance of counterinsurgency, from Shoup's other writings and statements, it is apparent that he believed he was acting within the boundaries set by the president. Similarly, no evidence was found to indicate that Kennedy was dissatisfied with the Commandant's performance.

The Appearance of Compliance

The fact that the Marine Corps appeared to comply with the administration's counterinsurgency initiatives further complicated matters. The organization took several steps in the form of training and publications that gave the impression that it was on the cutting edge of counterinsurgency theory and practice; however, as outlined above, critics claimed that these efforts were more style than substance, a conclusion borne out by the existing evidence.

Compared to the advances in support of greater strategic flexibility, Shoup's efforts to prepare Marines for counterinsurgency operations were minimal. Focused primarily on simply familiarizing personnel with the subject, the Marine Corps made no adjustments to force structure or operations. The preferred method for meeting the president's call to action occurred in training and education. For example, at The Basic School—the institution responsible for training all newly commissioned officers—instruction in counterinsurgency increased from zero to 51 hours between 1960 and 1962. However, 51 hours represented only 5 percent of the total instructional hours and 4 less than the time devoted to ceremonial functions such as close-order drill and sword manual. Fiscal year 1962 was the peak year for counterinsurgency training at the school. Leaders reduced it periodically during the next decade before finally removing it from the curriculum entirely by fiscal year 1973.[76]

Furthermore, much of the training offered dealt with small-unit tactics designed to defeat enemy forces rather than the hearts-and-minds approach envisioned by the administration. As occurred with the course "Counterinsurgency Scouting and Patrolling," sometimes the word *counterinsurgency* was simply tacked on to preexisting periods of instruction. In other cases, the Marine Corps included general training under counterinsurgency totals to give the impression that the Service was doing more than was the case. For instance, "Cold Weather Training" appeared in reports under the heading "Counterinsurgency Education."[77] Courses offered to more-senior officers were more closely in tune with the U.S. Overseas Internal Defense Policy; however, time devoted to this instruction paled compared to that dedicated to the conduct of amphibious landings and conventional warfare.[78] While efforts were made to familiarize Marines with counterinsurgency, the level of attention it

[75] J. E. Haffner to E. W. Snedeker, Greene Papers, box 104, "Personal Correspondence," Archives, MCHD.

[76] Basic Course Syllabi, Records of The Basic School, Marine Corps Schools, Quantico, VA, FY 1960–FY 1973, Archives, MCHD.

[77] Department of Defense, "Status of Military Counterinsurgency Programs, as of August 1, 1963," Departments and Agencies, DOD, box 280, "Counterinsurgency," JFKL. See also syllabi cited in footnote 79.

[78] Senior School Syllabi, Records of the Senior School, Marine Corps Schools, Quantico VA, FY 1952–FY 1965, Archives, MCHD.

received relative to other subjects must have left students wondering as to its overall importance.

For their part, the operating forces conducted a handful of small-scale efforts to prepare Marines for counterinsurgency operations in Vietnam. In 1961, for example, Fleet Marine Force Pacific rotated small groups of officers and noncommissioned officers into Vietnam periodically for two-week familiarization periods. Also, in 1961, the 3d Marine Division created a Counter-guerilla Warfare Study Group. In 1962, the division followed that up with an Infantry Training Course and a Command and Staff Training Course. The former, however, was only one week long and emphasized kinetic, light infantry operations in jungle terrain. The latter provided 10 hours of classroom instruction. These efforts, along with others initiated by subordinate commanders in the Pacific theater, could better be described as *jungle warfare* rather than counterinsurgency as envisioned by the administration.[79] A listing of all major Marine Corps activities during this period compiled by Headquarters Marine Corps shows that the focus of Marine Corps operating forces in the United States was exercising amphibious landings in North Carolina or Southern California. Outside of the United States, typical training activities consisted of battalion-size landing operations with allies and partners.[80]

Along these same lines, the only other initiative of note was the publication of counterinsurgency-related articles in the *Marine Corps Gazette*, the Corps' professional journal. These efforts culminated with the publication of a compilation of articles entitled *The Guerrilla—and How to Fight Him* in 1962.[81] The volume includes a memorandum from President Kennedy indicating that Shoup sent him a copy that he read "from cover to cover," leaving him "most impressed by its contents."[82] Herein lies another missed opportunity in the Marine Corps' response to counterinsurgency. The authors who contributed to the volume had firsthand experience as observers and advisors in such campaigns. For example, Brigadier General Samuel B. Griffith had spent years in Central America and China and was the leading expert on Mao Zedong's strategy and tactics, having been the first to translate Mao's *On Guerrilla War* into English. Other *Marine Corps Gazette* authors knew firsthand about insurgencies in Greece, Cuba, Malaya, the Philippines, and Algeria. While this group of officers was relatively small, one possible course of action could have been to group them in some sort of counterinsurgency think tank.[83]

Despite this resident expertise, at no point did the Corps come up with a substantive program to prepare for what some of its officers predicted was the future of warfare. Although an official manual—*Operations against Guerrilla Units*—was completed in 1962, much like the officer training mentioned above, it dealt primarily with tactical considerations rather than comprehensive counterinsurgency programs.[84] At the same time, the publications released gave the impression that the Marine Corps was a leader in the field. One could argue that by focusing solely on the tactical and failing to inspire any real change, the publications released were worth little more than the paper on which they were written.

As indicated by the title of the official manual referenced above, the Marine Corps conflated counterguerrilla operations and counterinsurgency. The former, based on the Corps pre–World War II experiences, viewed antigovernment forces that were more like organized criminal organizations or rural bandits. The latter involves an adversary more like the National Liberation Front in South Vietnam that is able to offer a comprehensive political program and mobilize tens of thousands of people in battalion and regimental-size units. Part of the reason that the Corps did not fully reorient toward counterinsurgency is because many officers underestimated the adversary and viewed them more as bandits and guerrillas

[79] Robert H. Whitlow, *U.S. Marines in Vietnam: The Advisory and Combat Assistance Era, 1954–1964* (Washington, DC: History and Museums Division, Headquarters Marine Corps, 1977), 39–42.
[80] Ralph W. Donnelly, Gabrielle N. Neufeld, and Carolyn A. Tyson, *A Chronology of the United States Marine Corps, 1947–1964* (Washington, DC: History and Museums Division, Headquarters Marine Corps, 1971), 43–64.
[81] Greene, *The Guerrilla—and How to Fight Him*."
[82] Greene, *The Guerrilla—and How to Fight Him*," front matter.
[83] Greene, *The Guerrilla—and How to Fight Him*.
[84] *Operations against Guerrilla Units*, Fleet Marine Force Manual 8-2 (Washington, DC: Headquarters Marine Corps, 1962).

as opposed to competent military professionals. Here again, the lack of definitional and doctrinal clarity discussed above prevented a common appreciation of the threat.

One possible course of action vetoed by Shoup was the creation of specially trained units. After a thorough review of the subject and observing what the Army was doing in this regard, the head of Marine Corps Schools, General Edward W. Snedeker, suggested that the Marine Corps designate teams whose sole purpose would be to train for counterinsurgency missions. In Snedeker's opinion, such teams could prove "invaluable" if the need arose.[85] Similarly, Douglas Blaufarb, a career Central Intelligence Agency officer and counterinsurgency expert, referred to this question as "the most critical question faced" by senior military leaders in the early 1960s.[86] Shoup refused to create specialized units and did not reorganize his headquarters or establish a separate staff to account for counterinsurgency matters. Instead, it was assigned as a collateral duty to an existing staff section.[87] In refusing to make any major changes, Shoup ensured that counterinsurgency would be viewed as just another additional duty by his own headquarters and operational units. With no one else specifically assigned to take ownership of the concept, General Krulak was the only senior Marine whose primary mission was counterinsurgency. The fact that he was assigned to the Joint Staff rather than a position of authority within the Marine Corps served to lessen his influence.[88]

As with the use of its own history to give the impression that it was uniquely suited for counterinsurgency, the Corps' pronouncements on the subject of specially trained units were similarly misleading. Asked to provide a status report of its programs, the Marine Corps offered a document that began with the disclaimer: "No special units have been organized" because "all combat and combat support units receive training in measures to combat guerrillas." However, under the heading of "Specially Trained Counterinsurgency Forces," the document went on to list 16 subordinate commands ranging from reconnaissance battalions to medical and engineer units and even the entirety of the Marine Corps' air component as being trained for counterinsurgency missions.[89] Despite the initial statement to the contrary, the annotated listing gives the impression that the Corps did, in fact, have specially trained units.

Whether the publications and training were an honest effort to familiarize Marines with counterinsurgency, a deliberate attempt to mislead the administration, or something in between is impossible to tell. However, the Marine Corps leaders' control over information and subject matter expertise allowed them to shape the administration's perception of their efforts. Someone unfamiliar with the Corps' structure and history would be unlikely to pick up on the fact that 51 hours represented only a tiny portion of The Basic School program or that Pioneer Battalions and Topographic Mapping Companies had changed little since 1961. In the Marine Corps' defense, one could argue that counterinsurgency received the level of attention it deserved; failed attempts at nation-building were not as likely to result in the significant loss of American lives as would a botched amphibious assault. Differing opinions over priorities, however, should not excuse attempts to cloud the issue to give the appearance of compliance.

Personal Relationships

General Shoup's no-nonsense work ethic and winning personality also help to explain why his intransigence on counterinsurgency went largely unnoticed by the White House. Secretary of the Navy Fred H. Korth and

[85] E. W. Snedeker to W. M. Greene, 20 September 1962, Greene Papers, box 105, "Personal Correspondence," Archives, MCHD. Although a formal letter denying Snedeker's request was not found, the copy in Greene's papers has "no" scribbled next to the portion dealing with the creation of teams. Considering Snedeker's rank and assignment, one can safely conclude that his request would be denied only with Shoup's approval.

[86] Blaufarb, *The Counterinsurgency Era*, 80.

[87] L. L. Lemnitzer to M. Bundy, "Summary Report, Military Counterinsurgency Accomplishments Since January 1961," 21 July 1962, Meetings and Memorandum, box 319, "Special Group (C.I.)," JFKL.

[88] The specifics and ramifications of MajGen Krulak's assignment are discussed in the following section.

[89] Department of Defense, "Status of Military Counterinsurgency Programs, as of August 1, 1963," Departments and Agencies, DOD, "Counterinsurgency," JFKL.

Tazewell T. Shepard, Kennedy's naval aide, recalled numerous instances in which the president expressed his high regard for General Shoup's leadership.[90] The only member to survive Kennedy's post–Bay of Pigs reorganization of the Joint Chiefs of Staff, the Commandant fostered positive working relationships with many congressmembers, Secretary of Defense Robert S. McNamara, and his fellow Service chiefs.[91]

To an administration very much concerned with appearances, Shoup was the iconic hard-fighting Marine Corps general with a distinctive persona. Known for being incredibly profane at times, "Uncle Dave," as his Marines nicknamed him, also wrote poetry and relaxed by gardening with his wife, rearranging his prized collection of Japanese saki bottles, and playing with his grandchildren. Facts such as these made him popular with the press, who reported favorably on his words and actions, referred to as "Shoup-isms." Shoup ended drumming out ceremonies and the use of swagger sticks. He also reduced his household staff and ordered the cessation of artillery salutes in his honor on the grounds that they cost $4.54 per round. Through actions such as these, Shoup endeared himself to the administration and the general public on a personal level. The poor Indiana farm boy cum general who never forgot his humble upbringing represented the quintessential American success story. Shoup was a valuable commodity for an administration often criticized for its elitism.[92]

Kennedy and his advisors found Shoup's masculinity particularly appealing. The first thing the president said to the Commandant was, "General, I have read about you," a reference to a book written about Shoup's battlefield heroics.[93] According to historian Robert Dean, an "ideology of masculinity" reigned in the Kennedy White House, and the president sought out men like Shoup who possessed the qualities of toughness, manliness, and "masculine virtue."[94] Two representative examples serve to illustrate this point. In early 1962, when called before Congress to respond to accusations from right-wing senators that he had not done enough to indoctrinate Marines on the evils of Communism, Shoup made it clear that he had no use for fear of Communism—or fear of anything or anyone, for that matter: "Fear breeds defeatism, and that is a disease we cannot afford in this country."[95] A year later, on a lighter note, the Commandant sent the president a copy of a 1908 directive issued by President Theodore Roosevelt requiring that Marines be able to march 50 miles in 20 hours. To see if their subordinates "still measured up," Kennedy and Shoup assembled a group of Marines and civilian White House officials, including Attorney General Robert Kennedy, to complete the challenge.[96] Widely reported in the media, incidents such as these enhanced the administration's reputation for toughness and vigor.

However, personal traits would have meant little were it not for the quality of Shoup's military advice. Of note, his role in the Cuban Missile Crisis helps to explain Kennedy's affinity for the no-nonsense Commandant. While other members of the Joint Chiefs of Staff were optimistic about a military strike, Shoup offered a straightforward estimate of the risks and costs involved. Rather than sugar-coat the situation,

[90] Fred Korth, interview with Joseph E. O'Connor, 27 January 1966, Oral History Program, JFKL, 4; and Tazewell Shepard, interview with William J. vanden Heuvel, 3 April 1964, Oral History Program, JFKL, 72 and 89.

[91] Part of Shoup's professional appeal stemmed from his determined effort to reduce inter-Service rivalries. He also worked closely with Secretary McNamara to improve efficiency and take advantage of new DOD business practices such as computerization and systems analysis. Unlike other Service chiefs, he readily adopted the management tools and techniques of McNamara and his civilian "whiz kids." With Marine Corps readiness as his overriding objective, Shoup cultivated any personal and professional relationships that could further this goal. See Shoup 7 April 1967 interview; and Jablon, *David M. Shoup*, 372–80.

[92] See Leckie, "Raring, Tearing, Cussing, Swearing United States Marine"; Sherrod, "General David M. Shoup"; Schanche, "Return of the Old Breed"; and Jablon, *David M. Shoup*. Shoup's "quotability" made him something of a media favorite.

[93] Shoup 7 April 1967 interview, 8.

[94] Robert Dean, "Masculinity as Ideology: John F. Kennedy and the Domestic Politics of Foreign Policy," *Diplomatic History* 22, no. 1 (Winter 1998): 29–31. Dean argues that Kennedy's counterinsurgency program was based in part on a desire to appear just as heroic and masculine as revolutionaries such as Che Guevara.

[95] John G. Norris, "Shoup: A Leatherneck with Homespun Flavor," *Washington Post*, 18 February 1962. For a transcript of the proceedings along with relevant documents, see *87th Congress, Second Session, Congressional Record: Proceedings and Debates of the 87th Congress* 108, no. 20 (13 October 1962): 1903–15.

[96] Jerry Doolittle, "Craze for 50-Mile Hikes Started by President's Fitness Challenge," *Washington Post*, 11 February 1963. The attorney general successfully completed the march.

he informed Kennedy that there was no easy way out militarily; to be successful, an invasion would require "sizable forces" and "plenty of insurance."[97] To reinforce this theme, Shoup delivered a powerful presentation to his fellow chiefs. Using an overhead projector, the Commandant placed a map of Cuba over a map of the United States. To the surprise of many in the audience, Cuba was more than 800 miles long, stretching from New York to Chicago. Finally, Shoup placed an overlay with a tiny dot over top of the Cuba map and said: "That, gentlemen, represents the size of the island of Tarawa and it took us three days and eighteen thousand Marines to take it."[98] Of those, more than 1,000 were killed and 2,000 wounded, Shoup among them—a casualty rate of nearly 18 percent. In his estimation, Cuba could not be done in 72 hours "even if Castro met us on the dock and helped us unload."[99] While certainly ready to invade if so ordered, the general believed it was his duty as the administration's resident expert on such matters to inform all involved of the probable costs. Only in this way could the president make a fully informed decision.

Other key personnel within the administration, mainly General Krulak, also resulted in mixed messages on the Marine Corps and counterinsurgency. To direct the nation's counterinsurgency program and "assure unity of effort and use of all available resources with maximum effectiveness," the president established the Special Group (Counterinsurgency) under the personal oversight of Attorney General Robert Kennedy.[100] In what proved to be an interesting turn of events considering the Corps' lukewarm response, Major General Krulak was assigned as the principal liaison between civilian policymakers and the armed Services. As the Joint Chiefs of Staff's special assistant for counterinsurgency, one of his primary duties was to keep the Joint Chiefs abreast of related developments discussed at the highest levels of government. At the same time, Secretary of Defense McNamara made Krulak his own special assistant for counterinsurgency. In this capacity, he was expected to update McNamara and Kennedy in person on the military's progress and compliance. Thus, the general occupied a unique position in which he had direct access to the president, the secretary of defense, and the Joint Chiefs for all counterinsurgency-related matters. Over time, he would emerge as the administration's staunchest uniformed advocate for its counterinsurgency policies.[101]

While Shoup was less than forthright in his critique of the administration's program, the presence of another Marine general expressing a diametrically opposed opinion further complicated the matter. At a time when the administration viewed Vietnam as a laboratory for its counterinsurgency initiatives, Shoup considered U.S. involvement irresponsible and likely to lead to escalation, a view he later recalled sharing with the president.[102] Krulak, on the other hand, sent on a fact-finding mission to Vietnam by Kennedy in September 1963, returned convinced that operations had the desired effect. In a report that he delivered in person to Kennedy, he maintained that "the Viet Cong war will be won if the current U.S. military and sociological programs are pursued."[103] All the advisors Krulak interviewed "were enthusiastic about the progress of the war" and could talk about little else aside from "the war, and the progress the Vietnamese are making."[104] While his optimism was tempered by

[97] Ernest R. May and Philip D. Zelikow, ed., *The Kennedy Tapes: Inside the White House during the Cuban Missile Crisis* (Cambridge, MA: Belknap Press, 1997), 181–82.
[98] David Halberstam, *The Best and the Brightest* (New York: Ballantine Books, [1969] 1992), 66–67.
[99] Letter from BGen Edwin Simmons to Ronald H. Carpenter, 17 October 1997, as quoted in Ronald H. Carpenter, *Rhetoric in Martial Deliberations and Decision Making: Cases and Consequences* (Columbia: University of South Carolina Press, 2004), 212. Carpenter, a professor of communication arts and rhetoric, considers Shoup one of the most effective communicators in U.S. military history.
[100] National Security Memorandum 124, "Establishment of the Special Group (Counterinsurgency)," 18 January 1962, in Mike Gravel, *The Pentagon Papers*, vol. 2 (Boston, MA: Beacon Press, 1972), 660–61.
[101] Krulak oral history, 187–88.
[102] M. D. Taylor to J. F. Kennedy, "Counterinsurgency Activities of the United States Government," 30 July 1962, *Foreign Relations of the United States, 1961–1963*, vol. 8, *National Security Policy* (Washington, DC: Government Publishing Office, 1996), 353; and Shoup 7 April 1967 interview, 35–36.
[103] "Report by the Joint Chiefs of Staff Special Assistant for Counterinsurgency and Special Activities (Krulak)," 10 September 1963, *Foreign Relations of the United States, 1961–1963*, vol. 4, *Vietnam August–December 1963* (Washington, DC: Government Publishing Office, 1991), 154, hereafter "Krulak Report," 10 September 1963.
[104] "Krulak Report,"10 September 1963, 155–57.

the pessimistic assessment of the State Department official who had accompanied him, Krulak's glowing report confused a situation the Commandant considered fairly straightforward: the involvement of U.S. forces in any way was a step closer to a land war in Asia.

Kennedy was assassinated less than three months after receiving Krulak's report. Only a few days prior, he had asked Shoup to stay on as Commandant, an offer the general declined on the grounds that if he accepted, he would impede the promotions of a number of dedicated subordinates. However, when asked if he would be willing to join the administration in a civilian capacity, Shoup indicated that he would. Due to the timing of Kennedy's death, it will never be known what the president's intentions were or what influence Shoup might have had on the course of events in Vietnam.[105] No offers were forthcoming from the Johnson administration, and the general retired on 31 December 1963. For his part, Krulak continued to promote Kennedy-era counterinsurgency doctrine throughout the Vietnam War. He engaged in heated exchanges with General William C. Westmoreland over the efficacy of counterinsurgency versus Westmoreland's more conventional approach. For the remainder of his life, Krulak would argue that Kennedy-era counterinsurgency techniques had not been tried and found wanting in Vietnam; they had never really been tried at all.

The interactions outlined above show how perceptions can be influenced by personal relationships as well as by proximity to the president. Shoup's popularity and the value of his military advice gave him room to maneuver when it came to counterinsurgency. Unlike other senior officers, he was not required to clear his speeches with the administration, and he was given considerable latitude when it came to Marine Corps policies and programs. Yet, at the same time that he was allowed to criticize, his views were contradicted by the only other senior Marine who had the president's ear. Furthermore, Krulak's genuine enthusiasm for counterinsurgency and his closeness to Kennedy and McNamara likely led them to conclude that the Marine Corps was doing far more than it actually was. There is also no evidence of Krulak ever confronting Shoup directly over the Commandant's intransigence. Krulak was an outlier whose views were not representative of those held by other senior Marines, yet this was not common knowledge among civilian officials.

The Responsibility of Senior Military Advisors

It would only be in retirement, with the Vietnam War in full swing, that Shoup let his true feelings on counterinsurgency be known publicly. In 1965, he launched a determined campaign to end U.S. involvement in Vietnam. In a series of speeches, articles, interviews, and appearances before Congress, the former Commandant challenged both the war and the assumptions on which Kennedy's counterinsurgency policies had been based.

First, Communism was not a monolithic entity that threatened the very existence of the United States. Deriding what he considered to be Americans' "Pavlovian reaction to communism," Shoup asked his listeners to consider that aggressive Soviet actions could stem in part from "Uncle Sugar's" post–World War II encirclement of the Soviet Union rather than a drive for world domination.[106] He also discounted the notion that a civil war in Vietnam, or anywhere else in the Third World, could result in "some kind of unwanted ideology . . . creeping up on this nation."[107] By combining his impeccable military record with his sarcastic rhetoric, Shoup proved to be a powerful critic of an assumption that had undergirded U.S. defense policy since the late 1940s. Rather than seek to contain or roll back Communism, he advocated letting

[105] Shoup 7 April 1967 interview, 42.

[106] John Maffre, "Old Soldier Becomes Underground Hero," *Washington Post*, 2 April 1967; and David M. Shoup, "Speech at Junior College World Affairs Day," Los Angeles, CA, 14 May 1966, reprinted in *Hearing before the Committee on Foreign Relations, United States Senate, Present Situation in Vietnam*, 90th Congress (20 March 1968) (statement of Gen David H. Shoup, former Commandant, United States Marine Corps), 47, hereafter Shoup congressional testimony.

[107] Shoup, "Speech at Junior College World Affairs Day," 46.

the peoples of the world do as they please. In time, they would figure out that Communism did not work.

Second, engaging in wars along the periphery hindered military readiness in the event that an existential threat should emerge. In Shoup's opinion, the Domino Theory was fundamentally flawed. Vietnam was of no real strategic importance to the United States: "It is ludicrous to think that just because we lose in South Vietnam that very soon somebody is going to be crawling and knocking at the doors of Pearl Harbor."[108] Furthermore, the conflict's impact on readiness was clearly evident by early 1967. By that time, Krulak, then responsible for all Marines in the Pacific and a staunch supporter of the war, had nearly 70,000 of his 102,000 Marines deployed to Vietnam. It is difficult to imagine how the Corps could have responded to another Cuban Missile Crisis–type event under these circumstances. Even if South Vietnam was of some strategic value and even if it could be preserved, which Shoup did not think possible, he could not see how the gain could "ever equal one-one thousandth of the cost."[109] Thus Washington's entire strategy was fundamentally flawed in that it detracted from America's overall readiness by deploying sizable forces to a peripheral region of little strategic value.

Third, he challenged U.S. motivations on two levels. First, World War II and the Cold War had vastly increased the military's influence in American society, a stark contrast from the suspicion of standing peacetime armies that had existed previously. Massive participation and familiarity with military service had changed the fabric of the nation resulting in a general tendency to "favor military solutions to world problems" and "military task force type diplomacy."[110] This tendency was enhanced by military professionals intent on furthering their interests and those of their Service by being the first to deploy, with the end result being a gross perversion of Shoup's cherished readiness. The Services had become so ready to deploy that "contingency plans and interservice rivalry appeared to supersede diplomacy."[111] In combination with their supporters in industry, the military had emerged as an overly influential player in U.S. foreign policymaking. Along with military officers, Shoup's critique of U.S. motivations targeted U.S. business interests. In one of his more colorful statements, issued in anger after he was not appointed Commandant, he argued:

> I believe that if we had and would keep our dirty, bloody, dollar-crooked fingers out of the business of these nations so full of depressed, exploited people, they will arrive at a solution of their own. That they design and want. That they fight and work for. And if unfortunately their revolution must be of the violent type because the "haves" refuse to share with the "have-nots" by any peaceful method, at least what they get will be their own and not the American style which they don't want and above all don't want crammed down their throats by Americans.[112]

[108] Shoup congressional testimony, 3. Shoup later reiterated his point about the Domino Theory by referring to sending advisors to Laos as "an over-exaggeration of the domino theory, and an over-exaggeration of the effort that we had to put in every place." *The Reminiscences of David M. Shoup*, 29 August 1972, Columbia University Oral History Collection, 27.

[109] Shoup congressional testimony, 19. Shoup's strategic assessment was seconded by noted China expert BGen Samuel B. Griffith (Ret), who argued that Vietnam was not "vital to the security of the United States" and that "the people in Peking would be very happy to keep us bogged down there." Warren Unna, "Ex-General Assails Viet War," *Washington Post*, 12 January 1968. For a more detailed account of retired military leaders who spoke out against the war in Vietnam, see Robert Buzzanco, "The American Military's Rationale Against the Vietnam War," *Political Science Quarterly* 101, no. 4 (1986): 559–76; and Robert Buzzanco, *Masters of War: Military Dissent and Politics in the Vietnam Era* (New York: Cambridge University Press, 1996), https://doi.org/10.1017/CBO9780511664960.

[110] David M. Shoup, "The New American Militarism," *Atlantic Monthly* (April 1969). See also James A. Donovan, *Militarism, U.S.A.* (New York: Charles Scribner's Sons, 1970) for a book-length version of the arguments presented by Shoup. Donovan, a retired Marine colonel and veteran of World War II and Korea, offers a scathing critique of the defense establishment and concludes: "The American war machine will continue to dominate all other national programs, needs, and interests" and "militarism will maintain its rule over the republic's character" (p. 238). Shoup and Donovan's works were collaborative efforts.

[111] Shoup, "The New American Militarism." Shoup also believed the Johnson administration's apparent "lack of credibility" could be traced to some of the "hocus-pocus" fed to him by the armed forces, which were, each in their own way, attempting to advance their interests.

[112] Shoup, "Speech at Junior College World Affairs Day," 47.

This passage also alludes to a fourth theme, the limitations of counterinsurgency and U.S. power in general. In his testimony before the Senate, Shoup argued that in attempting to remake other peoples in America's image, "instead of winning the minds and hearts . . . we have rather closed their minds and broken their hearts."[113] He would later write that no matter how hard Americans might try, we "cannot impose our will on the political and social order" in foreign societies, for "there are limits of U.S. power and our capabilities to police the world."[114] By highlighting Washington's inability to shape the socioeconomic and political landscape of other countries, Shoup's conclusions struck at the heart of modernization and counterinsurgency theory. His pessimism also stands in stark contrast to the optimism of the Kennedy era.

The intensity of Shoup's opposition to his government's policies begs the question—what responsibility did he owe President Kennedy while still in office? One can assume his misgivings did not emerge out of the blue in 1965. Shoup's biographer, historian Howard Jablon, traced the general's "antipathy towards big business" and "aversion to U.S. imperialism" to his humble Midwestern boyhood during the Progressive Era.[115] The journal he kept while in China and other statements made throughout his lengthy career support the conclusion that Shoup's misgivings were long-standing.

From the totality of Shoup's statements while on active duty and post-retirement, it appears he agreed with historian Eric Bergerud, who held that the primary failing of U.S. strategic leaders was that "they chose the wrong battlefield."[116] Shoup grasped a fundamental truth: the political, military, and geographic conditions in Vietnam favored the communists. A solution to what was primarily a Vietnamese political problem was beyond the reach of U.S. military power. In hindsight, Shoup's estimate of the situation was accurate.

The Commandant owed President Kennedy his best military advice. Shoup's course of action—failing to articulate his views while at the same time giving the appearance of at least partial compliance—limited the information available to the president and made the implementation of the policies Shoup opposed all the more likely. In contrast, General Krulak was the ideal military agent, enthusiastically executing the president's policies. As the president's senior advisor on Marine Corps matters, the Commandant owed Kennedy the benefit of his full and unadulterated advice. We can only speculate about what impact his assessment would have had if he had put it in writing while on active duty with the same intensity that he did in retirement. At a minimum, it would have provided a complete picture of where the Marine Corps stood on counterinsurgency.

Conclusions

Considering the scope of Kennedy's foreign policy agenda, translating rhetoric into action involved multiple agencies of the U.S. government. Consequently, the bureaucratic politics approach to making sense of foreign and defense policy provides a useful framework of analysis. According to historian Garry Clifford, this approach views foreign policy not as the result of deliberate actions by a unitary central government but rather as a product of negotiation and conflict among multiple influential actors. In this model, "the president, while powerful, is not omnipotent; he is one chief among many" and considerable "slippage" can occur between presidential decisions and their execution by lesser officials.[117] Along these same lines, political scientist Peter Feaver, in describing how civil-military interactions occur on a day-to-day basis rather than in theory, uses the term *shirking* to describe slippage in the civil-military realm. Derived from principal-agent theories of civil-military relations, shirking occurs when military leaders, the agents, pursue objectives not wholly in-line with instructions given by their civilian masters, the princi-

[113] Shoup congressional testimony, 20.
[114] Shoup, "The New American Militarism," xi–xii.
[115] Jablon, *David M. Shoup*, 116.
[116] Eric M. Bergerud, *The Dynamics of Defeat: The Vietnam War in Hau Nghia Province* (Boulder, CO: Westview Press, 1991), 335.
[117] J. Garry Clifford, "Bureaucratic Politics," in *Explaining the History of American Foreign Relations*, 2d ed., eds. Michael J. Hogan and Thomas Paterson (New York: Cambridge University Press, 2004), 91.

pals. Through their authority within their respective Services, their subject-matter expertise, and their ability to control the flow of information, senior officers can shape policies according to their own conceptions of the national interest. While *shirking* does not necessarily imply a desire to avoid work or an adversarial relationship, it does indicate interactions that are more complex than civilian officials issuing orders and military leaders carrying them out. In this way, the power of military leaders in foreign relations is derived more from their role in execution rather than formulation.[118]

Faced with the Kennedy administration's enthusiasm for counterinsurgency, General Shoup had to choose between compliance and defiance. Ultimately, he committed to neither course of action, opting for half-measures while hoping counterinsurgency would eventually disappear. Several factors—Marine Corps history, the synergy between the Marine Corps Concept and Flexible Response, visible successes in other areas, and warm personal relationships—allowed the disconnect between the White House and the Marine Corps to go largely undetected. As General Krulak noted in hindsight, the challenges inherent in counterinsurgency were "so utterly different" and incredibly complex that it was hard for people to comprehend them, let alone come up with workable solutions.[119] However, by not fully engaging with the problem, the Marine Corps missed an opportunity to shape policies and practices that would bear directly on its future missions. In a speech he gave to a group of senior officers shortly before his retirement, Shoup remarked, "Any group that considers weighty problems is bound to have differences of opinion. Our country will rue the day we all agree on all matters."[120] While there is little doubt that the general wholeheartedly believed this, the relationship between Kennedy, the Marine Corps, and counterinsurgency highlights the importance of each party fully developing and presenting their points of view.

This case is even more instructive in that slippage occurred without recognizable disconnects between the White House and Marine Corps Headquarters. Warm personal relationships and productive collaboration on a broad range of issues obscured that the Marine Corps made no substantive changes in response to a major presidential initiative. Rather than a Manichean case of an innovative young president thwarted by hidebound military traditionalists, the slippage was far subtler, making it difficult to identify and remedy. So subtle, in fact, that a close reading of the evidence gives the impression that the actors involved honestly believed they were in step with one another. This case also illustrates the military's influence on policymaking. Although they do not decide where and when the United States will intervene, how military leaders shape their forces through decisions made on training, structure, and equipment serve to limit or expand the options available to a president.

Of course, the actors involved could not have foreseen how their preparations for counterinsurgency, or lack thereof, would bear directly on U.S. efforts in Vietnam. At the time, withdrawal remained a viable option, and few would have predicted the subsequent introduction of hundreds of thousands of U.S. combat troops. Nor could they have known the degree to which historical interpretations of their actions would inform decisions made in twenty-first century conflicts in Iraq and Afghanistan. This inability to predict consequences highlights the value of history for policymakers. An examination of similar events in the past that considers the missteps, differences of opinion, and paths not taken provides the perspective needed to assess current issues accurately. In the end, if there is an insight to be drawn from the events described, it is that all parties in the policymaking process must bring the full weight of their expertise to bear on the problems at hand.

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[118] Peter D. Feaver, *Armed Servants: Agency, Oversight, and Civil Military Relations* (Cambridge, MA: Harvard University Press, 2003), 55–60.
[119] Victor H. Krulak, interview with William W. Moss, 19 November 1970, Oral History Program, JFKL, 7.
[120] David M. Shoup, "Speech to Armed Forces Staff College," 7 November 1963, Shoup biographical file, MCHD.

Inchon

A GUIDE TO THE MARKERS AND HISTORY

By Cord A. Scott, PhD

> I have just returned from visiting the Marines at the front, and there is not a finer fighting organization in the world.
>
> ~ Gen Douglas MacArthur,
> 21 September 1950, near Seoul

As the 75th anniversary of the start of the Korean War approaches, the time is ripe for reexaminations of the Battle of Inchon (15–26 September 1950) and for visiting the sites of the U.S. and South Korean forces' landing that led to the recapture of Seoul from North Korean forces. This article surveys the history of the Inchon landing and analyzes some of the landing sites and planning and explore associated markers and museums to serve as a field guide for those travelling to Korea to commemorate the event.

On 15 September 1950, Inchon (now Incheon), a port city just southwest of the capital of Seoul, was cemented in military history due to the daring landing that changed the nature of the war to that point. While the landing was not an easy one—when General Douglas MacArthur insisted on the site the planners thought that the landing was doomed to fail—it has remained as a point of commemoration for Koreans and Americans alike.

Dr. Cord A. Scott is an overseas collegiate faculty for the University of Maryland Global Campus in Asia. He teaches history, government, and humanities with a specific focus on film. He has written extensively on a variety of topics concerning popular culture, with two of his books centered on military comics in World War II. He is the author of *The Mud and the Mirth: Marine Cartoonists in World War I* (2022) and the forthcoming *They Were Chosin: U.S. Marine Cartoonists in the Korean War* (forthcoming 2025). https://orcid.org/0000-0001-7957-0871
https://doi.org/10.35318/mch.2025110103

Inchon and Its Significance

Inchon is a port city that sits approximately 20 kilometers (12.4 miles) southwest of Seoul central. The city has a large port and has contributed substantially to the growth and development of Korea.

Starting in the late 1890s, a considerable number of Chinese laborers moved to Inchon to work on the ships that brought goods into its port. This was extended when the Japanese exerted informal and then, after 1910, formal control of the Korean peninsula. The port offers access to Seoul and to the rail networks that extend from the capital city. The downside of the port is its major tidal swing between high and low tide: 31 feet, or approximately 8 meters.[1] Flying Fish Channel is where the difference in the tide is most perceptible.[2] As one drives over the modern Inchon bridge toward Inchon International Airport (built on a manmade island) the mud flats are clearly visible at low tide and extend well out into the bay. This shift also is one that allowed military planners to think that the port was basically unassailable.

The War in August 1950

Many American servicemembers, regardless of Service branch, are unaware of the Korean War or the significance of the Inchon landings. Often, military students even in the Republic of Korea (ROK) have not read about the conflict. On 15 August 1945, as the Japanese government surrendered to the Allies, unofficially

[1] While some reports note that the tidal difference may be up to 36 feet, high tide was calculated to measure 31.5 feet on 15 September 1950. BGen Edwin H. Simmons, "Over the Sea Wall: U.S. Marines at Inchon," in *U.S. Marines in the Korean War*, ed. Charles R. Smith (Washington, DC: Marine Corps History Division, 2007), 90.
[2] Flying Fish Channel is the name of the sea lanes leading to Inchon port.

ending World War II, the Korean people declared independence from the Japanese government. The Allied powers, in this case consisting of Soviet troops from the north and U.S. troops from the south and east, temporarily occupied the Korean peninsula with the hope of giving the newly independent people time to establish a government. To easily show the area occupational troops would control, an arbitrary dividing line at the 38th parallel was established, devised by two U.S. colonels, David Dean Rusk and Charles H. Bonesteel. This divided the country roughly in two and was not meant to be a permanent dividing line.[3]

The United States placed an initial force of 50,000 troops in Korea during its occupation from 1945 to 1949, shifting to the Korean Military Advisory Group in 1948–49, which consisted of 500 officers and enlisted to train ROK Army forces.[4] The main leader who was pushing for the role of president in the south was Syngman Rhee, who had been educated in the United States. In the north, the communists relied on the leadership of Moscow-trained leader Kim Il-Sung.[5] Neither political faction wished the other to rule a unified country, and by 1948 when elections were expected both sides boycotted. Of the two zones, North Korea had most of the industry, while South Korea was more agriculturally driven.

Following the major Cold War events was a short period during which the USSR detonated its first atomic bomb (29 August 1949) and the establishment of the Peoples Republic of China was declared (1 October 1949), seemingly demonstrating the spread of Communism. By the early 1950s, Kim was asking Joseph Stalin for Soviet assistance in launching a war to unify the peninsula by force. After an initial reluctance to spur a wider war on Stalin's part and with assurances from Chinese leader Mao Zedong, Kim ordered the Democratic People's Republic of Korea (DPRK, or North Korea) to attack the south. On 25 June 1950, the war was launched.[6]

The War

In the early morning hours of 25 June 1950, the forces of the DPRK, armed in part by the USSR, crossed the 38th parallel. The timing was significant, as many ROK soldiers were on leave, with the result that many units were understrength. The DPRK pushed forces south quickly, and the situation seemed dire. During this time, the South Korean delegation appealed to the United Nations (UN) Security Council for intervention. Due to a series of events, a vote was taken and the United States and United Nations immediately responded with a commitment of troops.[7] The first formal meeting between UN forces—elements of the 25th Infantry Division of the U.S. Army, commanded by Lieutenant Colonel Charles B. Smith—and DPRK armor columns occurred just north of the city of Osan on 5 July 1950. The battle lasted for approximately 90 minutes until UN forces were forced to retreat to the south.[8]

From this point, the UN forces and ROK forces maintained a slow but steady retreat to what was known as the Pusan Perimeter.[9] By late July, the battle lines became settled and desperate: there was a pocket in the lower southeast corner of the Korean peninsula, with the front line extending from the city of Daegu going east to the city of Pohang and south to the village of Masan-ni. Pusan (now Busan) was the largest city, and the main support port, for all troops and material fighting in Korea. The fighting along this front was desperate, with many units thrown piecemeal into positions to hold the line.[10]

For the U.S. Marines, their area of operations by August of 1950 was the lower part of the line to the West of Pusan, near the area of Masan-ni. The 1st Pro-

[3] *Foreign Relations of the United States, Diplomatic Papers: The British Commonwealth, The Far East—1945*, vol. 6 (Washington, DC: Government Printing Office, 1969), 1039, as cited in Bruce Cummings, *Korea's Place in the Sun: A Modern History* (New York: W. W. Norton, 2005), 187.
[4] *Korea—1950*, CMH Pub 21-1 (Carlisle, PA: U.S. Army Center for Military History, 1997), 6.
[5] Cummings, *Korea's Place in the Sun*, 197.
[6] George C. Herring, *From Colony to Superpower: U.S. Foreign Relations since 1776* (New York: Oxford University Press, 2008), 640.
[7] Herring, *From Colony to Superpower*, 641.
[8] Allan R. Millett, *The War for Korea, 1950–1951: They Came from the North* (Lawrence: University Press of Kansas, 2010,) 135–36.
[9] Map of landing zones in Millett, *The War for Korea, 1950–1951*, 210.
[10] "71: Into the Fire," directed by John H. Lee, 2010, IMDb entry, accessed 15 July 2024.

visional Marine Brigade was formed hastily and sent to Korea to hold the line.[11] Many of the Marines had been on occupational duty in Japan and were some of the first to be activated and sent to the front. While most of the 1st Marine Division was being activated and loaded in the U.S. mainland for the trip to Korea, the initial planning for the counterstrike against the DPRK was being planned.

Operation Chromite

In August of 1950, the head of the U.S. Army in Asia (and de facto ruler of Japan during the occupation from 1945 to 1954), General Douglas MacArthur stated to the U.S. high command that a decisive counterstroke was necessary to force the Communists back over the 38th parallel. The idea was that an Allied landing on the west coast of the Korean peninsula would allow the Allied forces to conduct a "hammer and anvil" operation, in which the landing force of U.S. Marines would be able to gain a foothold and serve as the anvil, while the now designated Eighth Army would break out of the Pusan Perimeter and quickly serve as a hammer against over-extended North Korean forces.[12]

There were three locations considered for this landing.[13] The first was near the city of Kunsan (Gunsan) along the southwest coast. While it offered a landing beach and was close to the Pusan Perimeter, it was not bold enough for the shock-and-awe strategy MacArthur envisioned. The general area is now the location of the Kunsan Air Base, which is home to U.S. Air Force fighter wings.[14]

The second location was near the Pyeongtaek location, located approximately 54.7 kilometers (34 miles) south of Seoul. While it offered landing beaches and a good port location, it also was deemed insufficient for the overall operation, as it was not close enough to effect a surprise, yet it did allow access to road and rail networks going into Seoul.

The landing site that MacArthur insisted on was the one that would offer the most gain but also posed the biggest risk: Inchon. The port was a mere 24 kilometers (15 miles) from downtown Seoul, offered port services for supply of UN forces, and would allow those same forces the ability to hit well behind DPRK supply lines. However, the risks, due to Flying Fish Channel's 31.5-foot tidal change, were substantial.[15] It introduced two critical issues that jeopardized the landing: first, the ships could not land for 12 hours, so the units that landed in the first wave would have to hold their position for half a day; and second, if ships were caught in the basin when the tide receded, they could very well be beached and their hulls subjected to gunfire. Members of the Joint Chiefs of Staff familiar with the plan told MacArthur that the plan was foolhardy and would fail. Even MacArthur gave the operation only a limited chance of success, reportedly saying that the landings might only have a 5,000-to-1 chance of succeeding. There was also the issue of the landing force, which was still being amassed.[16]

The weather was also a concern. Not only did the Allies have to deal with the tides and natural sea conditions, but it was also the time of year in which typhoons form suddenly. A further complication was that passage conditions needed to be optimal for the ships coming from the United States to Asia, to the port facilities in Japan (where further materiel would be loaded), and the trip from Japan to Inchon. Landing day was 15 September. During that time, there was hard fighting along the Pusan Perimeter, two typhoons (Jane and Kezia) that tore across the general area, and political arguments. Into this maelstrom went the Marines of 1st Marine Division.[17]

Anyone visiting Inchon today can locate several key landing locations while walking or using the city's light rail system around the area. To start, a visitor need only take the Line 1 (Dark Blue) to the Inchon terminus station. It is a short ride to Wolmi-do, and from there one can walk the routes between several historical markers of the landing and related museums. A taxi is the best option for getting to the Wolmi Theme Park to access the first location.

[11] Simmons, "Over the Sea Wall: U.S. Marines at Inchon," 90.
[12] Millett, *The War for Korea, 1950–1951*, 209.
[13] Millett, *The War for Korea, 1950–1951*, 208–11.
[14] Units, About Us, Kunsan Air Base, accessed 15 July 2024.
[15] Simmons, "Over the Sea Wall: U.S. Marines at Inchon," 90.
[16] Millett, *The War for Korea, 1950–1951*, 212.
[17] Simmons, "Over the Sea Wall: U.S. Marines at Inchon," 95.

Photo by Cord Scott

Green Beach Marker, Wolmi-do. The text on its plaque reads: "This point is one of the 3 places (Red Beach, Blue Beach, Green Beach) where US 1st Marine Division and ROK 1st Marine Regiment landed with 261 warships led by Commanding General Douglas MacArthur at dawn on 15 September 1950 for the successive Inchon landing operation." All three markers have the same inscription. This marker is next to the sea and is a favorite spot among locals for fishing.

The Landings

On the morning of 15 September at 0630, elements of the 3d Battalion, 5th Marines, were slated to land at what was designated Green Beach.[18] Intelligence reports had a small detachment of North Korean soldiers (the *226th Independent Marine Regiment*) and an artillery detachment, the *918th Artillery Regiment*, on Wolmi Island, estimated at 600 personnel, with a total of 2,500 estimated to hold the area between Inchon to Gimpo to the northwest.[19] Wolmi Island was considered the key to the entire operation, as it offered high ground as well as the ability to harass any shipping for the rest of the day. The Marines landing at Green Beach had to seize and hold the island for 12 hours until the tide returned and could drop the remainder of the Marines and elements of the U.S. Army 7th Division on the other two beaches (the Army landed at Blue Beach). The area had also been surveyed by ROK commando units to gain accurate information.

Modern Green Beach and its marker sits at the northwest shore of Wolmi peninsula (the island now has a road and reclaimed land), not far from the Wolmi Theme Park. The marker, like its counterparts for Red and Blue Beaches, is simple and is located near the spot where forces came ashore. All of the landing beach markers are of dark granite with light granite wings and sit on a light granite pedestal, standing a little taller than six feet. The markers are simple to showcase the location rather than evoke particular emotions. Each marker has the same information in both Korean and English. Of the three markers, only the Green Beach marker is next to water, demonstrating the economic success of the Korean economy in the years since the war. Due to how much of the area has been reclaimed from the bay as a result, Red and Blue Beach markers now sit well inland of the original landing sites. A quick survey of the terrain at these

[18] Simmons, "Over the Sea Wall: U.S. Marines at Inchon," 91.
[19] Simmons, "Over the Sea Wall: U.S. Marines at Inchon," 90.

Photo by Cord Scott

The monument dedicated to the ROK Marine Corps commandos who scouted the landing areas, then carried out a second landing in February 1951. This monument is next to the Red Beach marker, not far from Inchon train station.

markers gives an idea of what the Marines may have faced on landing and where they had to go. The Green Beach marker is located just north of the Wolmi Theme Park along the shore.

Visitors can get an idea of the terrain and conditions Marines had to navigate. Nearby is a cultural center with some monuments dedicated to the ROK Navy. A hill dominates the island and allows for a commanding view of the port and the inlet—the reason for its strategic importance.

To the east, there is a quick reference guide for the monorail. Follow the monorail as it heads toward Inchon and the connecting rail line. It is best to be on the opposite side of the road, rather than under it. As the monorail turns to the right, look left at that corner. There are several markers. The first two are to commemorate the role of the ROK commandos who made sure that the enemy positions were manned and transmitted any weaknesses to the landing forces. The other monument is at the Red Beach landing point. Of the two, the more significant and larger is of the ROK troops. The base of the monument contains etched photos of the terrain and the first landings in 1950 and of the second landing on 10 February 1951. In the case of this particular monument, the contribution of ROK forces is of greater importance, given how much has been written of the Marine Corps and the landings at Inchon. As a demonstration of how both forces contributed, the monuments are next to one another.

The landings here occurred in the late afternoon, at approximately 1730. It was here that the remainder of the 5th Marines landed at the sea wall, and the famous photograph of Lieutenant Baldamero Lopez leaving the landing craft, vehicle, personnel (LCVP) was taken. Lopez, who was with Company A, was killed not long after the photograph was taken, while pushing the attack.[20] The marker seems somewhat out of place at a bend in the road with no water in sight (the water is now 200 meters beyond, past the factory—a testament to the industrial growth and land reclamation done by the ROK government). By this time,

Courtesy of Naval History and Heritage Command
1stLt Baldomero Lopez climbs out of the landing vehicle and over the seawall at Red Beach, 15 September 1950, leading Company A, 3d Platoon, 1st Battalion, 5th Marines, in the second assault wave. Lopez was killed in action a few minutes later while assaulting a North Korean bunker.

the elements of 3d Battalion who were on Wolmi-do were resupplied and linked up with the rest of the 5th Marines.

The Red Beach assault was carried out in limited daylight and under fire from enemy forces. However, the elements of the 5th Marines came ashore in quick order and started their attack inland to the south. By midnight going into 16 September, Lieutenant Colonel Raymond Murray reported that the high ground of Inchon, including Cemetery Hill and Observatory Hill, were in Marine Corps control.[21] It is from Observatory Hill that one is able to see a clear view of Inchon harbor.

As one then walks toward the Inchon train station, the hill that signifies the Chinatown district of

[20] Smith, *U.S. Marines in the Korean War*, 110–11.

[21] Lynn Montrose and Capt Nicholas A. Canzona, *The Inchon-Seoul Operation*, vol. 2, *U.S. Marine Operations in Korea, 1950–1953* (Washington, DC: Historical Branch, G-3, Headquarters Marine Corps, 1955), 97–113.

Photo by Cord Scott

The Red Beach landing marker. Landings here occurred at 1730.

Inchon appears. At this point, there are stairs that lead to the top of the hill in Freedom Park (address: Freedom Park, 1-11 Jungang-dong, Jung-gu, Inchon; GPS 37 degrees, 28'30" N, 126 Degrees, 37'22" E), which gives an even more significant view of the port area. Here one sees the statue of General Douglas MacArthur upon a large pedestal. While the statue of MacArthur is life-size, the base is commanding. This gives the viewer a sense of MacArthur surveying the ground, as well as increasing his importance in the landing. He is both a man and a daring strategist. While his importance may open to debate, this statue conveys a sense of the risks and rewards. It was erected in 1957 to commemorate U.S. and ROK alliances.[22] At the base are further historical markers that signify the daring nature of the landings, the commemoration of the U.S. Navy in the landings, and the role of all combatants under the UN flag. The statue atop Freedom Hill is bronze with granite reliefs at the bottom commemorating all the UN forces that landed at that time.

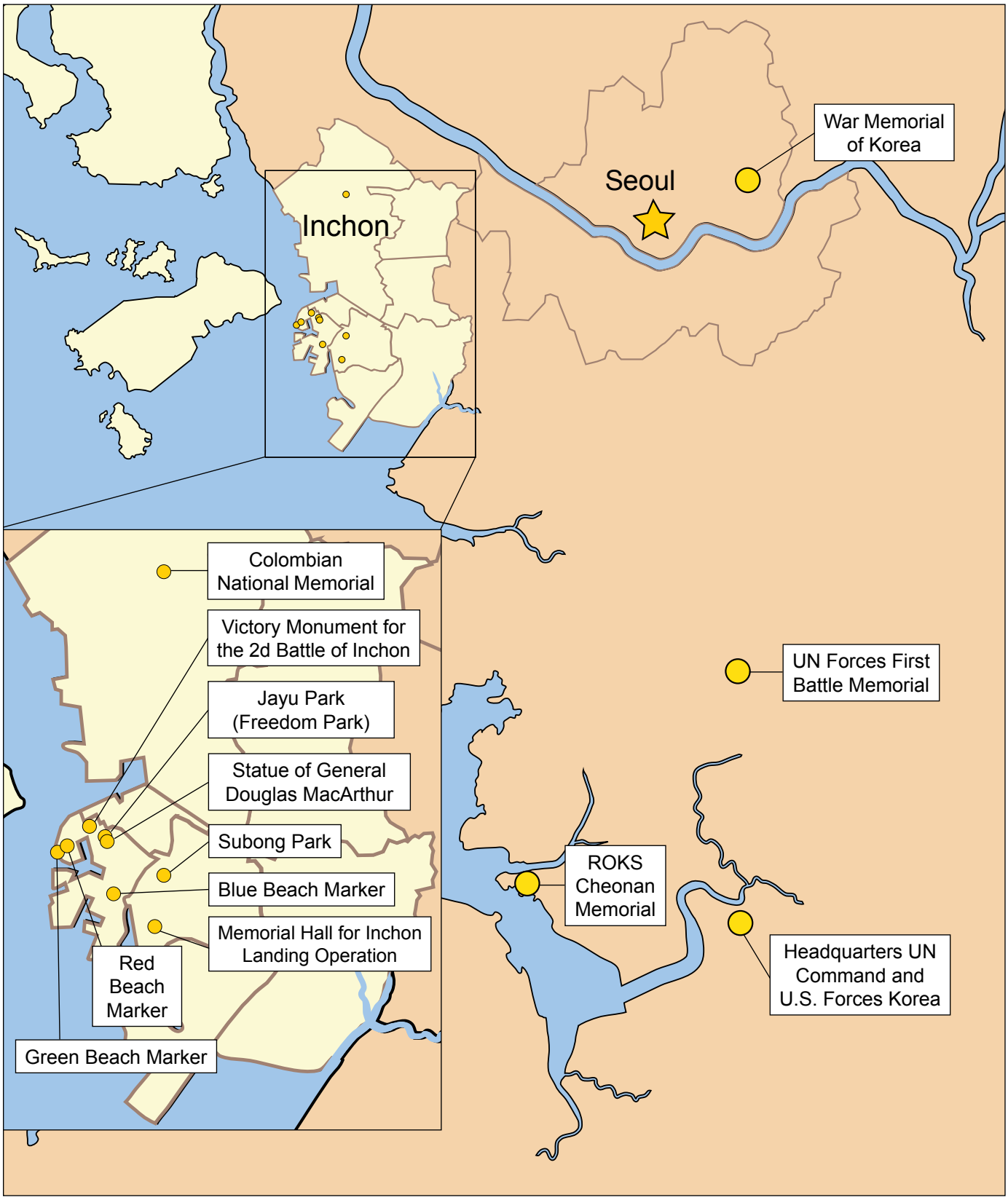
It is here that most of the historical markers for the Marine landing at Inchon are located. There are significant ones past this point, but all markers noted to this point can be reached by walking from location to location in under three hours, and this is at a leisurely pace. This is not to say there are no other significant places for those interested in the landings to see.

South of Inchon hill

The last of the three landing markers, Blue Beach, is a bit of a struggle to find. As with the Red Beach marker, it is well inland of the sea and could easily be overlooked. To further complicate matters, it sits on a main street next to a gas station, so it is not readily accessible.[23] What is a general benefit of this site is that

[22] Suhi Choi, *Embattled Memories: Contested Meanings in Korean War Memorials* (Reno: University of Nevada Press, 2014), 64–65.

[23] When looking for this marker, the author drove past it three times and only saw it while stopped at a traffic light, when he was finally able to access it from the gas station parking lot.



Created by MCUP

Map of Inchon museums and landing site and memorial markers.

Photo by Cord Scott

The Blue Beach landing marker is located adjacent to SK gas station Route 77 and Maesohol-ro.

Photo by Cord Scott

Remnant of the seawall at the Blue Beach landing marker.

the original seawall seems to be intact and gives the viewer a perspective of the obstacles to be overcome by the landing forces. This particular beach was where the last of the 1st Marine Division forces, along with elements of the U.S. Army's 7th Infantry Division landed. Fighting here was not as vicious, but the landings were still dangerous, and the outcome certainly not settled, partially due to the damaged seawall as well as the tidal flats. The 7th Division landed all material here and was operational by 19 September when it established a headquarters in the general area.

While not near the landing beaches, the pinnacle of the historical impact of the Inchon landings is at the Memorial Hall for Inchon Landing Operation.[24] Located approximately 2 kilometers (1.2 miles) from the beaches (address: 525 Ongnyeon-dong, Yeonsu-gu, Inchon; GPS 37 degrees, 25' 11" N, 126 degrees, 39'12" E), the museum occupies one of the larger hills in the area. It consists of large outdoor displays of equipment used in the landing, two life-size models—the Lopez picture and a recreation of the Marines atop the Wolmi Observatory—and several commemorative markers to the 1st Marine Division and related units in the area. Inside, there are several rooms displaying objects of the era, 3D models of the harbor, a life-size recreation of MacArthur and his staff watching the landing, and an overlay map that shows where the original landings took place, superimposed on the reclaimed land. There are some testimonials of the combatants, as well as interactive exhibits for younger visitors to the museum.

The outdoor exhibits include an LCVP, a landing craft, mechanized (LCM), a Cessna O-1 Bird Dog observation aircraft, and a variety of artillery pieces, as well as some modern equipment such as U.S. Marine Corps/ROK Marine Corps equipment from the 1980s, such as a landing vehicle, tracked (LVT), and an M47 Patton tank. There is also an additional section on the ROK Marine Corps—considered an elite force within the ROK—inside the museum.

[24] Homepage, Memorial Hall for Inchon Landing Operation, accessed 22 April 2025.

Photo by Cord Scott

A set of maps at the Memorial Hall for Inchon Landing Operation. The white borders delineate the original islands and shoreline on 15 September 1950, while the shaded area underneath identifies reclaimed land in 2016.

The museum offers an overview of the landings in a simple form, and the significance of physical items on display are explained through signage. Inside the museum, the first room displays concern the politics of the conflict and the units involved in the landings, showing examples of the equipment forces used during the battles. Visitors will notice the lack of body armor or other pieces of kit considered essential to modern Marines.

The next set of displays include a large three-dimensional map of the Inchon landing area to clearly demonstrate the scope of the invasion fleet, as well as a two-dimensional map of what the shore looked like in 1950 compared to its current topography. This gives the visitor an idea of how staff rides might have to adapt to the current terrain. A life-size model of General MacArthur (based on a photo of him watching the landings) is also displayed. The use of life-size figures offers the visitor a sense of presence.

Museums catering to both Korean and English speakers may offer limited information due to space restrictions; they are not able to provide a complete picture of the histories they house. These museums

Photo by Cord Scott

A statue of Gen Douglas MacArthur watching the landings from the USS *Mount McKinley* (AGC 7) at the Memorial Hall for Inchon Landing Operation.

Photo by Cord Scott

A statue and bas relief dedicated to the troops who landed in Inchon on 15 September 1950, located on the grounds of the Memorial Hall for Inchon Landing Operation.

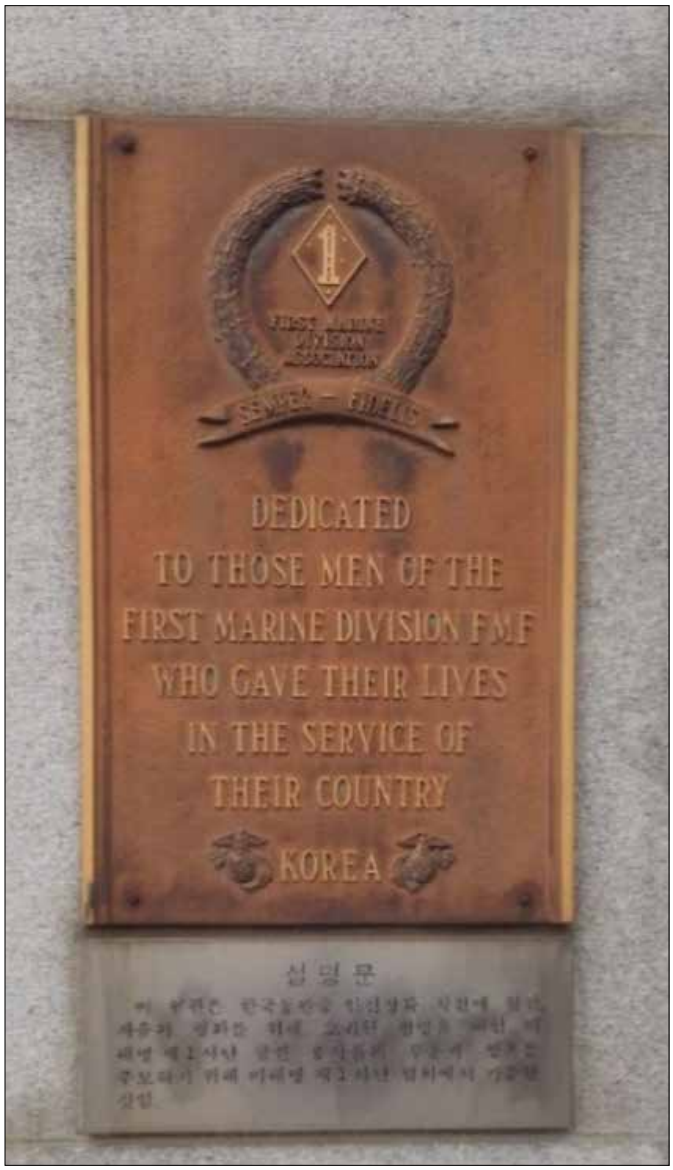


Photo by Cord Scott

Closeup of the plaque dedicated to the 1st Marine Division at the Memorial Hall for Inchon Landing Operation grounds.

and markers serve as a starting point for further academic study into the events of the Inchon landing and should not be taken as definitive history.

Moving onward through the Memorial Hall for Inchon Landing Operation and its grounds, the importance of the materiel used during the landing becomes more apparent. For example, on the grounds, there is a landing craft, vehicle and personnel (LCVP) located on the side of the hill. This gives the viewer a sense of size and the added feature of seeing the terrain on which the Allies fought.

Perhaps the most significant monument on the museum grounds is the statue dedicated to the U.S. and ROK landing forces. The three figures at the base of the monument all look forward—a nod to getting the job done without any sort of emotion. This statue grouping stands in contrast to the one at the entrance to the Korean War Memorial in Seoul, where the figures interact with one another. On the side of the statue is a panel dedicated to the 1st Marine Division for its actions on 15 September and beyond.

Secondary Markers and Sites

Another area that may be of interest to those studying the Corps' wider history is a bit to the north of the Inchon area. Near Gimpo International Airport, one can pick up the bus to Gangwha Island (Gangwhado). On the southeast side of the island, facing the greater Seoul area, is where the Marines landed in 1871, during an uprising against French missionaries. This particular incident is not well known by many non-Koreans, but it has been noted by Marine Corps historians and those studying Korean history of the late 1800s.[25]

Within the Inchon area, there are further markers of note. The Colombian national marker is one of the UN combatant country markers that is located throughout the country. These markers are located near significant battle sites or locations of importance to that country. (412 Gajeong-dong, Seo-gu, Incheon.) Another marker dedicated to the landings is located at Subong Park (address: Subong Park, 55-183 Yonghyeon-dong, Nam-gu, Inchon. 37 deg., 27'28" N, 126, 39'38" E), to the east of Freedom Park. It includes a statue 16 meters in height that is dedicated to those killed during the battle.

The last museum of possible interest in the south of Inchon is the UN Forces First Battle Memorial (address: 742 Gyeonggidaero, Osan, Gyeonggi-do 18112). This museum addresses the landing in part but mostly centers on the battle that brought the United States and the United Nations into the conflict.[26] While this museum may not have any direct connection to the U.S. Marines, it does give an overview of how the first U.S. combatants came to fight in Korea in the early part of July 1950. The museum incorporates several of the same displays as the Memorial Hall for Inchon Landing Operation but also includes the names of the U.S. troops killed during the battle. Visitors may walk up the hill behind the UN museum to where a full-size statue of Lieutenant Colonel Smith stands looking north, toward the approaching North Korean troops.

Photo by Cord Scott

Landing craft on the grounds of the Memorial Hall for Inchon Landing Operation. The outdoor exhibits are tiered areas going up the hill toward the museum. This allows visitors to experience the greenery of the hill, as well as note the terrain that the combatants faced just past the landing beaches.

For the Marines who landed on that first day, the fighting intensified as they pushed toward their first two inland objectives: Army Service Command XXIV Corps (referred to as ASCOM City), a former U.S. Army depot prior to the U.S. Military Advisory Group to Korea force withdrawal, and Gimpo Airfield. ASCOM was seized after stiffened North Korean defense on 17 September, while Gimpo was seized on 18 September.[27] This latter objective was important as it allowed UN aircraft, and more importantly Marine Corps fighters, to land so that they might refuel and rearm before giving close air support to the Ma-

[25] David McCormick, "The First Korean Conflict," *Naval History* 31, no. 2 (April 2017).

[26] Exhibitions, UN Forces First Battle Memorial, accessed 23 July 2024; and "Task Force Smith Memorial," Osan, American War Memorials Overseas, accessed 23 July 2024.

[27] Simmons, "Over the Sea Wall: U.S. Marines at Inchon," 124–26.

Photo by Cord Scott

A full-scale statue of the landing of the Marines on Red Beach at the Memorial Hall for Inchon Landing Operation, based on the famous photograph. 1stLt Lopez is depicted at the top of the wall. This statue's perspective—as if the viewer is a participant disembarking from the back of a landing craft, vehicle, personnel—enables the viewer to imagine themselves at the landing.

rines as they pushed on toward Seoul. To effectively accomplish this, they first had to cross the Han River, which is approximately 400 yards wide at the locations northwest of Seoul as well as in Seoul proper. For a more complete depiction of the battle of Seoul, one might also visit the War Memorial of Korea which is across the street and to the west of Dragon Hill Lodge at U.S. Army Garrison Yongsan-Casey. While the base is no longer active, the resort is maintained by the U.S. military and offers a central location from which to visit sites in the region. The War Memorial of Korea is a museum that is free of charge and gives the history of armed conflict in Korea.

Finally, The U.S. Marine Corps Forces Korea offices inside the UN headquarters building also have

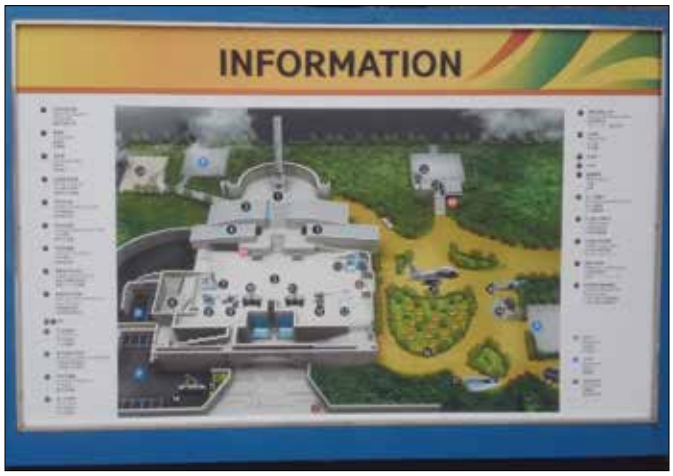


Photo by Cord Scott

A map of the grounds of the Memorial Hall for Inchon Landing Operation.

some significant displays of items captured. Now located within the UN Command building at U.S. Army Garrison Humphreys, access is restricted and may not be easily accessible.

Visitors interested in a side trip that demonstrates the nature of the conflict should go to the ROK Navy's 2d Fleet Command in the Port of Pyeongtaek. This area is approximately 15 kilometers from U.S. Army Garrison Humphreys, but it offers two naval displays of interest. There are two more recent monuments to the continued fighting between North and South Korea: a Chamsuri-class PKM 357 patrol boat, which was attacked near the Northern Limit Line in 2002; and the ROKS *Cheonan*, a Pohang-class corvette that was blown in two by a mine in 2010 with a loss of 47 sailors. The *Cheonan* was raised from the ocean floor and now is a permanent memorial on the grounds of the ROK Navy 2d Fleet Command base. To gain access, one only need a Department of Defense common access card (CAC), but to ensure an English translator and guide, arrangements should be made in advance.

Legacy of the U.S. Marine Corps in Korea

While the landings at Inchon were audacious and successful, they comprised only the first part of a long campaign. The fighting in Seoul and its environs went on for another two weeks. Following the battle there, the Marines were withdrawn from the fighting to re-

fit for their next operation, a landing at Wonson, on the eastern side of the DPRK-controlled area.[28] By this phase, the war was progressing quite fast, and when the landings were finally conducted, the U.S. and ROK Armies had secured the area. This was the first part of the People's Republic of China's involvement in the war, when Chinese People's Volunteers entered the war. This ultimately means that viewing any formal markers or commemorations of the battle of the Changjin/Chosin Reservoir and a marker to accommodate enemy forces 75 years later, requiring access to the ground within North Korea, is extremely difficult, if not actually impossible.[29]

For the U.S. Marines, Inchon is a symbol not only of the spirit that embodies the Service but also the fact that they achieved such a challenging task. While the sites do not fully capture the audacity of the landings, the fact that they are preserved says something profound about the sacrifices of the UN forces who carried out the operation. As with any historical site, the gravity of the event may not be fully understood until one is physically at the location. The Inchon landing effectively changed the momentum of the war and remains—along with the determination of those who later fought at Chosin—as a symbol of pride. To walk the grounds where the landings occurred, as well as see some of the history preserved along the way or in the museums in the Inchon area, is something that carries greater significance 75 years later. While many of the markers are simplistic and do not give a full account of the battle, it is a testament that the locations are recognized as a factor in the current success of the Republic of Korea. As more and more of the Korea Marines pass, these memorials and markers will serve as a way to preserve their sacrifices and to deepened understanding of the nature of the battle.

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[28] Joseph H. Alexander, "Battle of the Barricades: U.S. Marines in the recapture of Seoul," in Smith, *U.S. Marines in the Korean War*, 192–94.
[29] The author exchanged emails with Col Warren Weidhahn (Ret), president of the Chosin Few Association, who noted that a very small contingent of veterans was given entry into the DPRK in the late 1990s to go to the site, but they were constantly under DPRK observation.

HISTORIOGRAPHICAL ESSAY

Operation Iceberg

A BRIEF HISTORIOGRAPHY OF WORLD WAR II'S BATTLE OF OKINAWA, 1 APRIL–22 JUNE 1945

By Sarah E. Patterson, PhD

While major European battles such as the D-Day landings at Normandy and the iconic Pacific theater battle at Iwo Jima's flag raising garner attention from the public and historians alike, other significant World War II battles sometimes fall into the shadows. The Battle of Okinawa, the final major battle of the war, often is overlooked. In spite of its sometimes ignored or understated status, the Battle of Okinawa significantly influenced American opinion on the overall war against the Japanese and encouraged U.S. leaders to use the new weapon in their arsenal, the atomic bomb, rather than conducting massive amphibious landings to invade the Japanese main islands. The horrible casualty numbers at Okinawa led many military planners to believe that such a campaign in Japan would be far more costly and to hope that using the atomic bombs might push the Japanese to surrender before an invasion was needed.[1] The historiography of the battle includes official histories created by the U.S. military, academic monographs, and memoirs of U.S. servicemembers who fought in the battle. Marines wrote several of the most notable narratives. This essay briefly describes the battle and identifies and evaluates important historical research on the Battle of Okinawa, as well as a few of the most frequent debates surrounding the battle.

The Battle

While preparations for the Battle of Okinawa, codenamed Operation Iceberg, began as early as 1944, the invasion force, under the auspices of the U.S. Tenth Army, landed on 1 April 1945 on the island's Hagushi Beaches. The Tenth Army was an inter-Service force, including the Army's XXIV Corps, the Marine Corps' III Amphibious Corps, and the Tactical Air Force, Tenth Army, as well as elements of the Navy's Fifth and Third Fleets. Major units of the XXIV Corps included the 7th, 96th, 77th, and 27th Infantry Divisions. III Amphibious Corps consisted of the 1st, 2d, and 6th Marine Divisions. Army lieutenant general Simon Bolivar Buckner Jr. led the Tenth Army ground forces.[2] Many of these various units regularly worked

Dr. Sarah E. Patterson is a teaching assistant professor at East Carolina University in Greenville, NC. Her interests include the history of the U.S. Marine Corps, World War II, gender, and twentieth-century conflicts. She is presently working on a book investigating the intersection of Marine Corps masculinity and femininity during World War II. https://orcid.org/0009-0002-2333-1833
https://doi.org/10.35318/mch.2025110104

[1] George Feifer, *Tennozan: The Battle of Okinawa and the Atomic Bomb* (New York: Ticknor and Fields, 1992); and Alexander Burnham, "Okinawa, Harry Truman, and the Atomic Bomb," *Virginia Quarterly Review* 71, no. 3 (Summer 1995): 377–92.

[2] Gordon L. Rottman, *Okinawa 1945: The Last Battle* (Long Island City, NY: Osprey, 2002), 26–29, 38–43, 76; and Robert Leckie, *Okinawa: The Last Battle of World War II* (New York: Penguin Books, 1995), 1–7, 56–62. For overviews of the Battle of Okinawa, see also Saul David, *Crucible of Hell: The Heroism and Tragedy of Okinawa, 1945* (New York: Hachette Books, 2020); Roy E. Appleman et al., *Okinawa: The Last Battle* (Washington, DC: U.S. Army Center of Military History, 1993); Thomas M.

in support of each other regardless of Service branch, largely with Buckner's support.[3]

Just prior to the Okinawa landings, Buckner tasked elements of Tenth Army with securing the nearby Kerama Retto island group as a location for the American naval fleet to station for refueling, repair, and assembly purposes and to prevent possible Japanese artillery attacks from these locations. The 77th Infantry Division began securing the islands on 26 March and completed its mission on 31 March. These locations became vital for providing repair facilities for U.S. naval ships that sustained damage during the numerous Japanese air attacks to come.[4]

As the majority of Tenth Army began making its way to the Hagushi Beaches on 1 April, the 2d Marine Division participated in demonstration landings off the Minatoga Beaches, pretending on 1 and 2 April that they would make an additional amphibious landing. They hoped to split Japanese forces on the island and distract attention from the main landing force at Hagushi. As the Tenth Army made its way inland from Hagushi Beach, the landing force initially faced very limited resistance. Japanese military leaders on Okinawa, Lieutenant General Mitsuru Ushijima, Major General Isamu Cho, and Colonel Hiromichi Yahara, planned not to defend the beaches with the *Japanese 32d Army* but instead to fortify strategically chosen points in the southern half of the island to grind away at American forces as they approached. This meant that U.S. forces moved quickly away from the landing beaches. By the end of the day on 2 April, elements of the 7th Infantry Division reached the east coast days ahead of schedule, creating an American line across the center of the island that cut off the northern and southern sectors. From there, the Army XXIV Corps turned south, and the III Amphibious Corps moved north.[5]

Another important strategy used by the Japanese at Okinawa involved Operation Ten-go, using a combination of conventional and suicide aircraft to attack the American fleet supporting the Okinawa invasion and causing large numbers of American naval casualties. The first of these major kamikaze attacks occurred on 6–7 April, but numerous organized attacks by these fliers continued during the next two months. At the same time the first major kamikaze wave reached Okinawa, Navy Task Force 58 learned about a group of Japanese naval ships that were also approaching under the auspices of Operation Ten-Ichi. Planes from Task Force 58 intercepted the group, including the super battleship *Yamato* on 7 April, sinking *Yamato* and several other ships before forcing the remnants of the fleet to return to Japan. The thwarted Japanese plan involved destroying as many American naval ships as possible on the way to beaching *Yamato* off the Okinawa coast and using the ship's guns to bombard the island until ammunition ran out and

Huber, *Japan's Battle of Okinawa, April–June 1945*, Leavenworth Papers no. 18 (Fort Leavenworth, KS: Combat Studies Institute, U.S. Army Command and General Staff College, 1990); Jim Boan, *Rising Sun Sinking: The Battle for Okinawa* (Austin, TX: Eakin Press, 2000); Gerald Astor, *Operation Iceberg: The Invasion and Conquest of Okinawa in World War II* (New York: Donald I. Fine, 1995); Feifer, *Tennozan*; Bill Sloan, *The Ultimate Battle: Okinawa 1945–The Last Epic Struggle of World War II* (New York: Simon and Schuster, 2007); Frank M. Benis, *Okinawa: The Great Island Battle* (New York: Elsevier-Dutton, 1978); James Belote and William Belote, *Typhoon of Steel: The Battle for Okinawa* (New York: Harper and Row, 1970); and Ian Gow, *Okinawa 1945: Gateway to Japan* (Garden City, NJ: Doubleday, 1985). For Marine Corps-focused overviews, see Joseph H. Alexander, *The Final Campaign: Marines in the Victory on Okinawa* (Washington, DC: Marine Corps Historical Center, 1996); Charles S. Nichols Jr. and Henry I. Shaw Jr., *Okinawa: Victory in the Pacific* (Washington, DC: Historical Branch, G-3 Division, Headquarters Marine Corps, 1955); Benis M. Frank and Henry I. Shaw Jr., *Victory and Occupation: History of U.S. Marine Corps Operations in World War II*, vol. 5 (Washington, DC: Historical Branch, G-3 Division, Headquarters Marine Corps, 1968); and Laura Homan Lacey, *Stay Off the Skyline: The Sixth Marine Division on Okinawa—An Oral History* (Washington, DC: Potomac Books, 2005). Several authors have also written unit- or company-specific histories of the battle, such as George R. Nelson, *I Company: The First and Last to Fight on Okinawa* (Bloomington, IN: 1st Books Library, 2003); and Donald O. Dencker, *Love Company: Infantry Combat Against the Japanese World War II Leyte and Okinawa Company L, 382nd Infantry Regiment 96th Infantry Division* (Manhattan, NY: Sunflower University Press, 2002).

[3] See Rodney Earl Walton, *Big Guns, Brave Men: Mobile Artillery Observers and the Battle for Okinawa* (Annapolis, MD: Naval Institute Press, 2013) for more on the cooperation between mobile artillery observers with various units on the ground at Okinawa. Samuel Eliot Morison also provides an account of the Navy's work in support of Operation Iceberg. Samuel Eliot Morison, *Victory in the Pacific, 1945*, History of United States Naval Operations in World War II, vol. 14 (Annapolis, MD: Naval Institute Press, 1960), 79–282; and Robert N. Colwell, "Intelligence and the Okinawa Battle," *Naval War College Review* 38, no. 2 (March–April 1985): 81–95.

[4] Rottman, *Okinawa 1945*, 53–54; Leckie, *Okinawa*, 56–58; and Morison, *Victory in the Pacific, 1945*, 88.

[5] Rottman, *Okinawa 1945*, 18–26, 35–36, 54–66; and Leckie, *Okinawa*, 67–85.

then sending the surviving crew to join in the fighting on the ground.[6]

April also brought the invasion of more of the smaller surrounding islands by U.S. forces in support of the larger battle. In one incident, famous war correspondent Ernie Pyle was killed on 18 April while embedded with the 77th Infantry Division on the nearby island of Ie Shima (Iejima). The many American servicemembers who admired him mourned his loss.[7]

By 19 April, XXIV Corps forces stalled at what became known as the Shuri Line, a defensive line stretching from Ouki village on the eastern part of Okinawa to the Machinato Inlet on the western side of the island. It was here that the U.S. forces encountered the first of several mutually supporting fortifications prepared by the Japanese military. Even as elements of the XXIV Corps became stuck at the Shuri Line, the 6th Marine Division successfully secured the northern Motobu Peninsula on 20 April. During the next week or so, the 77th Infantry Division, previously involved in securing nearby smaller islands, landed on Okinawa and quickly relieved the exhausted 96th Infantry Division. At almost the same time, the 1st Marine Division relieved the 27th Infantry Division near the Shuri Line as well. The 27th Infantry Division moved north to continue the process of securing northern Okinawa, and soon, the remainder of III Amphibious Corps joined the battle at the Shuri Line as well.[8]

The 6th Marine Division moved into the critical position fighting for control of the area surrounding Sugar Loaf Hill, control of which assisted in the fight to capture Shuri. The fierce battle lasted from 13 to 19 May, allowing the division to advance only 520 yards and costing more than 3,000 Marine casualties. Eventually, however, the 6th Marine Division succeeded in capturing its objective.[9]

Although the battle at the Shuri Line was fierce, the Americans made slow headway, and from 30 May to 4 June, the Japanese *32d Army* began quietly withdrawing the bulk of its forces to a second fortified line further south at the Kiyamu Peninsula, leaving just enough troops behind to slow the American advance. By 31 May, the 5th Marines, 1st Marine Division, controlled Shuri Castle. Just a few days later, the 4th Marines, 6th Marine Division, tried to take advantage of the recent forward progress by conducting a shore-to-shore assault on the Oroku Peninsula on 4 June, a maneuver that would later be recognized as the last opposed amphibious assault of World War II. By 14 June, U.S. military leaders considered the peninsula secure, and the following day the 8th Marines, part of the 2d Marine Division, joined up with the 1st Marine Division at Naha.[10]

Even as the battle moved in favor of the Americans, a piece of shrapnel killed General Buckner while he observed near the front. As a result of his death and under Buckner's previous orders, Marine Corps general Roy S. Geiger took charge of Tenth Army, becoming the only Marine to command a field army in battle. Army lieutenant general Joseph W. Stilwell relieved Geiger a few days later. On 21 June, Geiger declared the end of organized resistance on Okinawa, although pockets of guerrilla-style fighting continued until around 30 June in the southern part of Okinawa and 4 August in the northern part of the island. As the Americans pressed farther south, General Ushijima realized that time was limited, and he soon ordered Colonel Yahara to escape and report back to Tokyo. Meanwhile, Ushijima and General Cho prepared for

[6] Rottmann, *Okinawa 1945*, 76–77; Leckie, *Okinawa*, 15–21, 87–96, 115–19, 141–46, 187–95; and Astor, *Operation Iceberg*, 145–88, 291–309. For more on the U.S. Navy's involvement in the Battle of Okinawa, see Morison, *Victory in the Pacific*; Rod MacDonald, *Task Force 58: The U.S. Navy's Carrier Strike Force That Won the War in the Pacific* (Annapolis, MD: Naval Institute Press, 2021), 427–51; Stephen L. Moore, *Rain of Steel: Mitscher's Task Force 58, Ugaki's Thunder Gods, and the Kamikaze War off Okinawa* (Annapolis, MD: Naval Institute Press, 2020); Robin L. Rielly, *Kamikazes, Corsairs, and Picket Ships: Okinawa, 1945* (Havertown, PA: Casemate, 2008); and Simon Foster, *Okinawa, 1945* (London: Arms and Armour, 1995). See also Arnold Lott, *Brave Ship, Brave Men* (Annapolis, MD: Naval Institute Press, 1964) for more on the USS *Aaron Ward* (DD 483); and John Wukovits, *Hell From the Heavens: The Epic Story of the USS* Laffey *and World War II's Greatest Kamikaze Attack* (Boston, MA: DaCapo Press, 2015) for more on the USS *Laffey* (DD 724).

[7] Rottmann, *Okinawa 1945*, 66–69; and Leckie, *Okinawa*, 125–26.

[8] Rottmann, *Okinawa 1945*, 69–75; and Leckie, *Okinawa*, 133–39.

[9] Rottman, *Okinawa 1945*, 78–79; Leckie, *Okinawa*, 165–81; and James H. Hallas, *Killing Ground on Okinawa: The Battle for Sugar Loaf Hill* (Annapolis, MD: Naval Institute Press, 1996).

[10] Rottmann, *Okinawa 1945*, 80–83; and Leckie, *Okinawa*, 183–86, 197.

ritual suicide, the only way they believed they could maintain their honor in the face of impending defeat.[11]

The Battle of Okinawa caused catastrophic loss of life. Thousands of Americans, Japanese, and Okinawans died. While numbers vary somewhat from one source to another, Gordon L. Rottman's numbers are fairly representative. He lists Marine Corps losses as 2,938 dead or missing and 16,017 wounded, Army losses as 4,675 dead or missing and 18,099 wounded, and more than 26,200 additional casualties who suffered from noncombat-related injuries, various illnesses, and combat fatigue. The U.S. Navy also lost 4,900 dead or missing and suffered 4,800 wounded. Thirty-six ships were sunk, and another 368 vessels were damaged. Rottman estimates that about 66,000 Japanese and Okinawan soldiers died, approximately 17,000 were wounded, and 7,400 became prisoners of war. Additionally, around 4,600 kamikaze air crews and hundreds of other pilots with more conventional missions died as well. The highest number of deaths that resulted from the Battle of Okinawa, however, occurred among the civilian population of Okinawa: at least 122,000, including around one-third of the island's indigenous population. These losses devastated Okinawan families and culture.[12]

Published Primary Sources

Published primary sources related to Okinawa also provide valuable insight into the decisions made by commanders and the experiences of the soldiers and Marines on the ground. For example, E. B. Sledge's *With the Old Breed: At Peleliu and Okinawa* and R. V. Burgin's *Islands of the Damned: A Marine at War in the Pacific* recount the authors' experiences at battles in the Pacific theater, including Okinawa, from the perspective of an enlisted man in the 1st Marine Division. Christopher L. Kolakowski recently introduced and edited General Buckner's diaries from his time at Okinawa in *Tenth Army Commander: The World War II Diary of Simon Bolivar Buckner Jr.* Nicholas Evan Sarantakes also edited *Seven Stars: The Okinawa Battle Diaries of Simon Bolivar Buckner, Jr., and Joseph Stilwell*, a version of Buckner's and General Joseph Stilwell's Okinawa diaries. John Grehan compiled the official British admiralty account of Great Britain's portion of the battle—*Okinawa: The Last Naval Battle of WW2: The Official Admiralty Account of Operation Iceberg*—providing further insight into high-level decision-making during the battle.[13] While not many works focused on the Japanese and Okinawan perspectives are available in English at present, those that are available provide important insight into other sides of the battle. A few notable examples include the memoir of Colonel Hiromichi Yahara, senior staff officer of Japan's *32d Army* during the Battle of Okinawa, *The Battle for Okinawa: A Japanese Officer's Eyewitness Account of the Last Great Campaign of World War II*; the memoir of Admiral Matome Ugaki, commander in charge of many of the Japanese *5th Air Fleet*'s kamikaze attacks on American ships supporting the Battle of Okinawa, *Fading Victory: The Diary of Admiral Matome Ugaki, 1941–1945*; Okinawan civilian Tomiko Higa's memoir of her experiences as a seven-year-old child separated from her family during the battle, *The Girl with the White Flag: An Inspiring Story of Love and Courage in War Time*; as well as a translated collection by Mark Ealey and Alastair McLauchlan of edited newspaper articles originally published by an Okinawan newspaper that attempted to preserve and highlight the experiences of civilian Okinawans during the battle in the years

[11] Rottmann, *Okinawa 1945*, 35, 83; Leckie, *Okinawa*, 197–205; and Hiromichi Yahara, *The Battle of Okinawa: A Japanese Officer's Eyewitness Account of the Last Great Campaign of World War II* (New York: John Wiley and Sons, 1995).

[12] Rottmann, *Okinawa 1945*, 84–85; and Feifer, *Tennozan*, 446–63, 527–34.

[13] E. B. Sledge, *With the Old Breed: At Peleliu and Okinawa* (New York: Ballantine Books, 1981, 2010); R. V. Burgin, *Islands of the Damned: A Marine at War in the Pacific* (New York: NAL Caliber, 2011); Christopher L. Kolakowski, ed., *Tenth Army Commander: The World War II Diary of Simon Bolivar Buckner Jr.* (Havertown, PA: Casemate Publishers, 2023); Nicholas Evan Sarantakes, ed., *Seven Stars: The Okinawa Battle Diaries of Simon Bolivar Buckner, Jr., and Joseph Stilwell* (College Station: Texas A&M University Press, 2004); and John Grehan, comp., *Okinawa: The Last Naval Battle of WW2: The Official Admiralty Account of Operation Iceberg* (Yorkshire, UK: Frontline Books, 2022). See also Art Shaw, *82 Days on Okinawa: One American's Unforgettable Firsthand Account of the Pacific War's Greatest Battle* (New York: William Morrow, 2020).

after the war, titled *Descent into Hell: Civilian Memories of the Battle of Okinawa*.[14]

Unpublished Primary Sources

A number of archival collections contain significant unpublished primary sources related to the Battle of Okinawa. The Marine Corps History Division's Archives Branch offers a finding aid for its collections related to the battle in its Campaign Collections Research Guides.[15] The U.S. National Archives and Records Administration (NARA) also holds relevant collections, including Record Group 38, Records of the Office of the Chief of Naval Operations, 1875–2006, and Record Group 127, Records of the United States Marine Corps, 1775–1981. Additionally, NARA holds records related to the postwar occupation period and the prosecution of war crimes that include Okinawa in Record Group 260, Records of U.S. Occupation Headquarters, World War II, 1923–72.[16]

Historical Debates

Two major themes emerge in the historiography with regard to historical debate surrounding this battle. First, a number of historians consider the significance of the Battle of Okinawa to the impending end of World War II. For example, Robert Leckie's classic work, *Okinawa: The Last Battle of World War II*, George Feifer's *Tennozan: The Battle of Okinawa and the Atomic Bomb*, and Alexander Burnham's article for the *Virginia Quarterly Review*, "Okinawa, Harry Truman, and the Atomic Bomb," argue that American success in the battle critically influenced the Japanese decision to surrender. These authors do not argue that the U.S. use of atomic bombs and the Russian invasion of Manchuria were not important but that the significance of the Battle of Okinawa to these conversations has been understated. Additionally, the military's experiences at Okinawa informed President Harry S. Truman's decision to use the atomic bombs. Some in the Truman administration thought that if Japanese soldiers and sailors would fight so hard for land hundreds of miles from their home islands, they and the civilian populace seemed likely to fight even harder for their homes.[17]

Another major point of debate for many historians has been the effectiveness of General Buckner's command decisions. As the battle lasted for 82 days, an increasing number of military leaders questioned Buckner's methods and whether his plans were aggressive enough for the situation. In particular, historians considered Buckner's decision not to conduct a second amphibious landing at Minatoga Beach in late April to approach the Japanese Army from an additional direction and potentially hasten the end of the battle. Some agree with Buckner's assessment that adequate supplies were not available to support a seconding landing, while others argue that supplies were available and a second landing could have ended the battle much sooner, saving lives. The debate began during the battle with disagreements between members of Buckner's senior staff as to the best way forward. The Navy's argument in favor of more aggressive action hinged on the unusually large number of casualties the Service suffered as a result of Japanese aerial attacks as they waited offshore in support of the ground invasion. As Buckner considered the options, he eventually decided that in addition to a lack of necessary supplies, the ground forces already engaged with the Japanese needed the support of the troops suggested for the amphibious force, and additionally, the landscape of the Minatoga beachhead could make for a very difficult landing. Furthermore, Buckner believed that Ushijima's forces were weakening and a

[14] Hiromichi Yahara, *The Battle for Okinawa: A Japanese Officer's Eyewitness Account of the Last Great Campaign of World War II* (New York: John Wiley and Sons, 1995); Matome Ugaki, *Fading Victory: The Diary of Admiral Matome Ugaki, 1941–1945* (Pittsburgh, PA: University of Pittsburgh Press, 1991); Tomiko Higa, *The Girl with the White Flag: An Inspiring Story of Love and Courage in War Time*, trans. Dorothy Britton (New York: Kodansha International, 2013); and Mark Ealey and Alastair McLauchlan, trans., *Descent into Hell: Civilian Memories of the Battle of Okinawa Ryukyu Shimpo* (Portland, ME: Merwin Asia, 2014).

[15] Campaign Collections, Okinawa, Archives Branch, Marine Corps History Division, Quantico, VA.

[16] These records can be located at the National Archives and Records Administration (NARA) location in College Park, MD, although some records are now available digitally at the NARA website. NARA also holds information on the Army's involvement in the Battle of Okinawa in Record Group 92, Records of the Office of the Quartermaster General.

[17] Leckie, *Okinawa*; Feifer, *Tennozan*, 566–84; and Burnham, "Okinawa, Harry Truman, and the Atomic Bomb," 377–92.

breakthrough could be expected soon. Splitting their focus at that point with another amphibious landing might slow that progress. Several researchers, including Paul E. Cunningham II and Christopher Kolakowski conclude that, overall, Buckner and his staff made the best decisions they could with the information they had at the time and conducted a largely successful campaign.[18]

Marine Corps involvement was vital to the success of American forces in the Battle of Okinawa, and Marines fought alongside their Army counterparts throughout the ground battle and alongside Navy and Army Air Corps pilots in the air. Many arguments about the relative contribution of the Army versus the Marine Corps exist, as well as debates over the effectiveness of particular units within Tenth Army. The reality, however, is that both Army and Marine Corps efforts were vital to the eventual success of Operation Iceberg. Much of the debate surrounding who received more credit originated in differences in media coverage of the Army versus the Marine Corps during the battle. Nicholas Evan Sarantakes argues that the Marine Corps' embrace of the press relative to the Army resulted in a larger amount and more favorable media coverage for the Corps. This created inter-Service resentment at the appearance of media favoritism of the Marine Corps.[19] However, all the involved Services made important contributions to the battle.

Conclusions

Historians and military strategists have extensively considered many aspects of the battle, particularly the command decisions. There are, however, some parts of the battle that would yet benefit from further investigation. More information in English is needed on the experiences of Japanese soldiers during the battle, as well as the tragic circumstances of the Okinawan people who remained trapped in the center of brutal combat. Additionally, in spite of the importance of the island's terrain to the conduct of the battle, environmental history of the Battle of Okinawa is still relatively limited. Although most historians of the Battle of Okinawa reference the terrain, few focus intensively on this issue.[20] While the Battle of Okinawa has received substantial consideration, the above provide a few examples of areas where the historiography could benefit from additional research.

After 82 days of hard fighting on Okinawa, the American military began preparations for its next battle. The Battle of Okinawa provided a snapshot for American leaders as to conditions servicemembers might face in battle on the main islands of Japan, the next planned stop for the U.S. military. As the Japanese soldiers seemed determined to fight to the very last, Americans considered potential death tolls for a fight happening at Japan's front door and the estimates were chilling. While it is debatable to what extent President Truman and his advisors made their decision to use the atomic bomb rather than conduct a ground invasion based on loss data from the Battle of Okinawa, these heavy casualties were soon used as justification for this new weapon's use. Even as the Battle of Okinawa came to an end, it remained uncertain, especially to those on the island, that this would be the final major battle of the war.

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[18] Paul E. Cunningham II, *Command and Control of the U.S. Tenth Army During the Battle of Okinawa* (London: Verdun Press, 2014); Sarantakes, *Seven Stars*, 134–36; Leckie, *Okinawa*, 158–62; Kolakowski, *Tenth Army Commander*, 233–38; and Christopher L. Kolakowski, " 'Our Flag Will Wave Over All of Okinawa': Simon Bolivar Buckner's Pacific War," *Army History*, no. 130 (Winter 2024): 6–22.

[19] Nicholas Evan Sarantakes, "Warriors of Word and Sword: The Battle of Okinawa, Media Coverage, and Truman's Reevaluation of Strategy in the Pacific," *Journal of American-East Asian Relations* 23, no. 4 (2016): 334–67.

[20] While many historians mention the landscape in passing, including the extensive tunnel and cave systems and the use of reverse slope tactics, few focus extensively on the impact of terrain on the battle. For example, Dale Floyd's article considers Okinawa's terrain but focuses more specifically on the strategies used by combat engineers. Dale E. Floyd, "Cave Warfare on Okinawa," *Army History*, no. 34 (Spring/Summer 1995): 6–9. The master's thesis of Kennon Howell Keiser Jr. provides an initial glimpse into how an environmental history of the Battle of Okinawa might look. Kennon Howell Keiser Jr., "Weaponized Landscapes: An Environmental History of the Battle of Okinawa and Its Aftermath" (master's thesis, Appalachian State University, 2019).

BOOK REVIEWS

Noah F. Crawford

Life in Jefferson Davis' Navy. By Barbara Brooks Tomblin. (Annapolis, MD: Naval Institute Press, 2019. Pp. 336. $17.40, cloth.)

Since Bell Wiley regaled readers with insights into *The Life of Johnny Reb* (1943) and *The Life of Billy Yank* (1952), American Civil War scholars have directed readers' eyes down the chain of command to see how enlisted soldiers experienced the conflict. While this initially took the form of seeing battles from the ground floor *à la* John Keegan, scholarship in recent decades considers what army service looked like beyond the battlefield. Civil War historians increasingly ask readers to consider what everyday life was like for soldiers. When pursuing this task, however, scholars stare intently at boots on the dry ground at the expense of those on ships' decks. The omission is especially curious given the long-accepted maxim that Union naval successes—particularly those of its brown-water navy—played an integral role in crippling the Confederate war machine. Barbara Brooks Tomblin's *Life in Jefferson Davis' Navy* capably redirects the historiographic rudder toward understanding the wartime experiences of Confederate sailors.

Tomblin argues that Civil War naval history thoroughly examines Union operations, Confederate operations, and Union sailors' daily lives, but not the missing quartile of Confederate sailors' daily lives. Drawing on "letters, diaries, journals, regulations, and official reports," Tomblin systematically examines each aspect of Confederate sailors' lives—from religion and entertainment to discipline and duty (p. 2). When the Confederate Committee on Naval Affairs sent telegrams to all U.S. naval officers with instructions to resign and report to Mobile, Alabama, 259 answered the call. Just as scores of Southern-born cadets left West Point in 1861, so did 111 of the 267 cadets at the Naval Academy at Annapolis leave their studies; many joined their respective states' navies before those entities were subsumed by the fledgling Confederate Navy. To promote naval military education of their own, the Confederate States established their own naval academy to operate on the school ship CSS *Patrick Henry* (1859). In further imitation of the United States, the Confederacy established an accompanying marine corps of about 1,000 officers and enlisted. Despite its replication of many aspects of the U.S. Navy, the Confederate Navy did have some important distinctions, including its refusal to enlist African Americans as sailors, although they could serve as pilots. Indeed, 40 percent of pilots in the Savannah Squadron were enslaved people (free African Americans, however, were barred from piloting).

The creation and growth of the Confederate Navy appropriately comprise the first two chapters. When the opposing armies first clashed at Manassas in July 1861, the fledgling Confederate Navy boasted 500 sailors; by war's end, some 5,000 sailors donned Confederate gray (plus some 1,300 Marines). Recruiting was a consistent problem in the Confederacy, and boys as young as 14 years old were permitted to enlist (although anyone under 21 years old required parental consent). In 1864, the Confederate Congress passed legislation mandating that soldiers in the army who had worked as seamen before the war were to be immediately transferred to naval service. Commerce raiders even accepted volunteer crewmembers—including, on at least one occasion, a contingent of Hawaiians—from captured Union vessels to man their own ships. Confederate sailors adopted regulation

Noah F. Crawford is a graduate assistant lecturer and PhD candidate in history at Texas A&M University in College Station. His research on refugees examines the intersection of military history and social history during the American Civil War era.

routines, drilled at their stations, complained about food shortages, and enjoyed their leisure time. Tomblin recounts sailors tossing biscuits to dolphins, celebrating Christmas, and drinking grog (which the Confederate Navy continued to issue even after the U.S. Navy discontinued the ration in 1862).

To be sure, Tomblin does not fall into the trap of excluding military operations entirely; combat—though a small percentage of a sailor's life—was often part of it. Several chapters cover naval operations on the coast and on the high seas. Tomblin's book includes descriptions of familiar actions, such as those at Hampton Roads and Mobile Bay, as well as a riveting narrative of CSS *Arkansas*'s 1862 rampage through Union gunboats on the Yazoo River. Since Tomblin focuses on sailors' lives rather than details of the ships, the author necessarily describes engagements in which Confederate sailors and Marines fought on land as naval infantry, such as Commodore John Tucker's Naval Brigade during the Appomattox Campaign. Casualties from these battles were fortunate to find themselves at naval hospitals, which Tomblin diagnoses as "commendable" despite "shortages and disruptions caused by the war" (p. 121). These forays into operational history and military medicine will satiate the appetites of readers whose interest lies in those areas without diverting too far from the book's primary topic of Confederate naval life.

Has Barbara Brooks Tomblin brought Civil War naval historiography closer to a social history of a military environment in the spirit of Bell Wiley? If not, she has done something very near like it. Thoroughly researched and cleanly written, *Life in Jefferson Davis' Navy* provides nonspecialists with a superb introduction to the Confederate Navy. Naval historians will commend Tomblin's concise, yet wide-ranging synthesis, while Civil War historians will appreciate this initial foray into expanding scholarship on life in the Confederate Navy. For either the Civil War or the naval historian, Tomblin's work deserves a spot on the bookshelf.

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Scott D. Hamm, PhD

The Reality of the My Lai Massacre and the Myth of the Vietnam War. By Marshall Poe. (Amherst, NY: Cambria Press, 2023. Pp. 426. $124.99, cloth; $39.99, e-book.)

There is no shortage of books about the events of 16 March 1968, when a U.S. Army unit massacred hundreds of civilians in the village marked My Lai (4) on soldiers' maps. In *The Reality of the My Lai Massacre and the Myth of the Vietnam War*, author Marshall Poe sets out to write a book different than those that preceded it. Poe rightly identified that among the countless other books on My Lai, most focused squarely on the massacre and cover-up without attempting to put the events into the context of the planned military operation or to chronicle the operation's actual conduct.

The book is well-organized and divided into two parts. The first—"Reality"—begins by examining the key figures and laying out the previous efforts of Task Force Barker in its area of operations. It goes on to provide a detailed, minute-by-minute microhistory of what happened with Lieutenant William L. Calley's first platoon of Company C that morning, from the time the unit awoke and embarked on helicopters until the end of the morning's bloodshed. Here also, Poe chronicles the much lesser actions of Company B that day, which are usually glossed over with passing references to killings by another unit of the task force. Previous books have covered some of the actions that day, but without the benefit of the interviews and documents to which Poe had access, and they did not add much to understanding that day at My Lai beyond Seymor Hersh's *My Lai 4: A Report on the Massacre and Its Aftermath* (1970), written largely based on his initial interviews with some of the perpetrators. While Poe does not focus on the cover-up, he sheds light on several misconceptions concerning it.

Dr. Scott D. Hamm, a retired Marine Corps sergeant major, teaches modern naval history at the U.S. Naval Community College at Quantico, VA. He is currently researching the actions of Sgt Paul H. Foster, Medal of Honor recipient for his actions near Con Thien in 1967. https://orcid.org/0009-0002-2412-0173.

The second part—"Myth"—examines how common views and misperceptions about the events on 16 March gained currency and were legitimized over time because of partisan politics and the need for Americans to find some "understanding of My Lai that is both politically and psychologically acceptable" (p. 6). These include the early efforts of the antiwar elements to sour the public's support for the war before My Lai by looking for evidence that the United States was fighting a war by atrocity. My Lai's revelation fit their narrative and helped create two other associated myths, that Vietnam was "another kind of war" and that the men fighting there were "another kind of soldier." Poe's approach to debunking these myths is reminiscent of Gary Kulik's writing in *War Stories: False Atrocity Tales, Swift Boaters, and Winter Soldiers—What Really Happened in Vietnam* (2009).

Poe identified Christopher R. Browning's work *Ordinary Men: Reserve Battalion 101 and the Final Solution in Poland* (2017) as the inspiration for his efforts. He wanted to understand, as Browning had helped do for the German atrocities, "why the soldiers did what they did and how they did it" (p. 1). He does a remarkably thorough job, using thousands of pages of interviews to inform his book. In the aftermath of the massacre's revelation, investigations by the U.S. Army's Criminal Investigation Division and Lieutenant General William R. Peers's commission yielded interview transcripts that totaled a vast 18,000 pages and a collection of 5,000 other documents relating to Task Force Barker and the massacre. These make the operation during which the My Lai Massacre occurred one of the best-documented operations of that war, and Poe used that wealth of information to the benefit of the reader.

In the end, Poe succeeded in delivering a book that accomplished his mission of giving the soldiers of

My Lai the same treatment Browning gave to the Germans of *Battalion 101*. His description of the events of 16 March 1968 delivers new context to the reader's understanding. He goes beyond past works' attempts that assign blame to Calley, the stress of the war on the soldiers, or decisions and doctrine of military and civilian leaders, and he offers several clear-cut suggestions for the causes based on a detailed study of the available material. These suggestions seem well-founded, as his work is supported by meticulously cited interviews from many members of the company rather than cherry-picked examples. This sets his work apart from the much earlier treatments, which had access to neither the finished investigations nor testimony from as broad a pool of subjects. This book is well-written and extends the useful literature on My Lai in a meaningful way.

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Zachary M. Matusheski, PhD

Baker Bandits: Korea's Band of Brothers. By Emmet Shelton Jr. Edited by Cynthia Shelton. (Philadelphia, PA: Casemate, 2020. Pp. 384. $34.95, cloth; $17.99, e-book.)

Many Korean War veterans returned home with both physical injuries and psychic scars. Initial government resistance to acknowledging cold-weather injuries as service-related and a general national mood to move on from the war led many veterans to bear their pain in silence for many years. By the 1980s, however, that changed. Korean War veterans started to reconnect in groups like the Chosin Few, a gathering of veterans who had survived the desperate fight in North Korea during the winter of 1950. Inspired by those connections, veteran Emmet Shelton Jr. joined with other members of Company B (Baker), 1st Battalion, 5th Marine Regiment, 1st Marine Division, to form a reunion group. To encourage the group's growth and reunite with members of his unit, Shelton began publishing a newsletter titled *The Guidon* in 1986. Excerpts from that newsletter, along with Marine diaries, interviews, and other sources, make up the sources for *Baker Bandits: Korea's Band of Brothers*. Memorable testimonies, poems, and photographs within the book make it a worthwhile read for scholars of the war. The personal nature of the snapshots in *Baker Bandits* will help readers better understand what it was like to serve in the Korean War.

When editing and organizing those submissions, Emmet Shelton Jr.—and later, his daughter, Cynthia Shelton—hoped to highlight the sense of brotherhood the members of Baker Company held for each other. In the preface to the book, Cynthia Shelton underscores the high rates of suicide among younger generations of veterans. In writing *Baker Bandits*, and drawing on her father's background, she aimed to use the Baker Company experience as a tangible example of the strong sense of fraternity among Marines. Such connections, she hopes, can help address the urgent issue of veteran suicide. With that as a motivation, the idea of brotherhood comes through the text in inspiring ways.

True to this goal, *Baker Bandits* begins with a transcript of a short speech Lieutenant General Charlie Cooper gave at the 1989 Baker Company reunion. Cooper, who later served as commander of the Fleet Marine Force, Pacific (1983–85), led Marines when he was a junior officer in Baker Company during the Korean War. There, he learned of the "growing bond" inculcated by service in the Marine Corps (p. xxii). As commander of the 1st Marine Division during the 1970s, Cooper distributed a wallet card that underscored the "Band of Brothers" concept, which emphasized that Marines practice empathy and seek to actualize a vision of squads and above as a "disciplined family structure, with similar relationships based on mutual respect among members" (p. xxiii). The book attempts to explain some of those ideas about service through vignettes from different Baker Company Marines.

Following this orientation, *Baker Bandits* is divided into sections focused on campaigns in which the Baker Company Marines served. Testimonies from well-known campaigns, such as the Inchon landings and Chosin Reservoir campaign, are included along with less well-known engagements, like the April 1951 fight for Hill 313, the June 1951 campaign for Hill 907, and the Reno-Vegas-Carson campaign of March 1953. The review of Baker Company's effort to hold Hill 907—while containing information previously published in the memoir Cooper wrote with Richard E. Goodspeed, *Cheers and Tears: A Marine's Story of Combat in Peace and War* (2002)—is still valuable, as

Dr. Zachary M. Matusheski is a historian who studies the intersections of military history, presidential history, and U.S. domestic politics. He published a historiographical essay about the Inchon operation for *Marine Corps History* 9, no. 2 (Winter 2023/2024) and is currently researching Korean War operational history. https://orcid.org/0009-0003-8221-2831.

the Sheltons organized many perspectives on Cooper's decisions and wounding during that fight. The book's review of less prominent battles encourages readers to want to learn more.

Baker Bandits also captures what life was like when the company was recovering in the rear. In that section, the Sheltons arrange testimonies to provide insight into how the Marines regained their strength following their fight for survival in the Chosin Reservoir during the winter of 1950. Entries in this section show how young Marines found ways to get into trouble by sneaking in hard liquor. The testimonies also review the songs Marines sang, as well as the Christmas observances during 1950–51. That section highlights a broad strength of *Baker Bandits*: its demonstration of the humanity of the Baker Company Marines. This not only makes for good reading but will also help future scholars craft lively, colorful narratives of the Korean War. In this way, the book joins fine oral histories such as Richard Peters and Xiobing Li's *Voices from the Korean War: Personal Stories of American, Korean, and Chinese Soldiers* (2004); Lewis H. Carlson's *Remembered Prisoners of a Forgotten War: An Oral History of Korean War POWs* (2003); and Rudy Tomedi's *No Bugles, No Drums: An Oral History of the Korean War* (1994).

While the testimonies in general are accessible, contextualization of the different campaigns is lacking. In many sections, it is not clear what Baker Company was trying to accomplish. For example, the book does not explain why Baker Company Marines were engaged in counterinsurgency during the January–February 1951 period. Likewise, the hill fighting testimonies would have been more provocative had the editors explained why those locations mattered in tactical, operational, and strategic terms. Additionally, some time spent contextualizing each campaign in the book would have made it more accessible to a wider audience.

These criticisms aside, *Baker Bandits* is an important contribution to both Korean War scholarship and the history of the Marine Corps. The Sheltons have done a great service in organizing the testimonies. Readers gain a better sense of how Marines fought and survived during the Korean War. The book also provides inspiring testimonies of sacrifice and fraternity while also underscoring the great benefit of veteran reunions. By any measure, *Baker Bandits* is a worthy read for those interested in the Korean War.

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Commander Daniel J. McGrath, USN

The Pursuit of Happiness: How Classical Writers on Virtue Inspired the Lives of the Founders and Defined America. By Jeffrey Rosen. (New York: Simon and Schuster, 2024. Pp. 368. $28.99, cloth; $20.00, paperback; $14.99, e-book.)

Jeffrey Rosen's book, *The Pursuit of Happiness*, could not have been published at a better time, given the strong, ongoing interest in Stoic philosophy, virtue ethics, and spiritual fitness in the U.S. Marine Corps today. The book's title, taken from the American Declaration of Independence, is the third of our inalienable rights, to "Life, Liberty and the Pursuit of Happiness." A fairly well-known phrase among philosophers of the time, *pursuit of happiness* was substituted for *property* in the declaration by Thomas Jefferson. This change of phrase provided an all-inclusive ideal that was more satisfying to the mind of the founders than mere property. Rosen's book is an exploration of the minds of the founders, and in joining him on this exploration, the reader comes to see how these ideas have defined the United States from the beginning.

Happiness is a word that requires some definition if we are to understand what the founders meant by it. We may associate happiness with pleasure, but the founders considered the pursuit of happiness a lifelong quest for a virtuous life. Following classical philosophers such as Cicero and Pythagoras, they recognized that personal self-control is a prerequisite for political self-governance. They saw more value in *being* good than in simply *feeling* good. The success of the American Republic depended on a virtuous population that knew how to effectively channel its passions.

One quotation from Rosen's book that gets to the heart of the matter is from ancient Roman Stoic philosopher Seneca's book *On a Happy Life*:

> There is not anything in this world, perhaps, that is more talked of, and less understood, than the business of a happy life. It is every man's wish, and design, and yet not one of a thousand that knows wherein that happiness consists. We live, however, in a blind and eager pursuit of it; and the more haste we make in a wrong way, the further we are from our journey's end. The true felicity of life is to be free from perturbations; to understand our duties toward God and man, to enjoy the present, without any anxious dependence upon the future. Not to amuse ourselves with either hope or fears, but to rest satisfied with what we have, which is abundantly sufficient; for he that is so, wants nothing. . . . Tranquility is a certain quality of mind, which no condition of fortune can either exalt or depress. Nothing can make it less, for it is the state of human perfection (pp. 148–49).

Rosen felt the need for a personal survey of classical moral philosophy when he perceived a gap in his own education on this subject. For centuries, college students studied Greek and Roman writers, but this had largely ceased in most of American higher education by the latter half of the twentieth century. Dismayed by the hedonism he observed in American culture, yet equally unconvinced by puritanism, Rosen was ready to explore a middle way of humane moral reasoning. The opportunity presented itself during the COVID -19 quarantines of 2020, when many Americans were

Cdr Daniel J. McGrath, USN, is command chaplain of Marine Corps University, Quantico, VA. He has earned a doctoral degree from the University of California at Santa Barbara, the JPME 1 diploma from the Naval War College, and is a Fleet Marine Force qualified officer.

abruptly separated from their customary daily routines and felt lost. The conditions were right for Rosen to undertake his systematic study of classical moral philosophy in the original sources and in the writings of the founders of our country.

The need for personal structure amid times of change is a key theme of the book, for order is a basic tool in the pursuit of happiness. The reader soon becomes aware that the founders kept orderly lists of things, for example, many kept lists of books that they read and recommended for others. Thomas Jefferson's list of books on religion forms the core of the library of which Rosen based his explorations of ancient and Enlightenment moral philosophy. It includes authors such as Locke, Xenophon, Epictetus, Marcus Aurelius, Seneca, Cicero, Henry Bolingbroke, David Hume, and Oleg Kaim. Many of the founders also kept lists of virtues they practiced in daily life. Benjamin Franklin's list, which also provides the basic organization of Rosen's book, included temperance, silence, order, resolution, frugality, industry, sincerity, justice, moderation, cleanliness, tranquility, chastity, and humility. The founders were keenly interested in the ordering of their daily activities. Many adhered to schedules for reading, exercise, sustenance, and entertainment. George Washington documented a list of his daily activities, under the heading "Where and how my time is Spent."

> Throughout his life, he kept the unvarying hours of a farmer, rising before sunrise and devoting hours before breakfast to reading, correspondence, inspecting his horses, and private prayer. After a breakfast of corn cakes and tea, he mounted his horse and rode twenty miles to make a survey of his farms, supervising the construction and inspecting the field work. He returned for a midday dinner, the most substantial meal of the day, which began at exactly two forty-five in the afternoon with the sounding of the dinner bell. After a few hours in his library, he had a light supper and would read aloud to his family before bed at nine o'clock (p. 151).

A well-ordered life required disciplined physical and mental habits. Jefferson recommended two hours of daily exercise, noting, "A strong body makes the mind strong" (p. 87). "In the Pythagorean spirit of mindful living in the moment," he prescribed mental focus and presence of mind during these activities. While engaging in outdoor activity, one should focus on nature rather than becoming "distracted by unproductive thoughts" (p. 87).

In the organization of the book, the reader can perceive Rosen's disciplined artistry. He does not merely lecture us abstractly about being virtuous people. Rather, like a curator, he skillfully displays for our edification a captivating array of classical philosophers and American founders. The book is organized into 13 chapters corresponding to Franklin's list of virtues. Each virtue is paired with one or two of the founders who exemplified that virtue. Some of the individuals you might expect to find include Franklin, Jefferson, John Adams, and Washington, but Rosen also treats us to other Americans such as Phyllis Wheatley, Abigail Adams, and Fredrick Douglass. One fascinating feature of the book is how Rosen wrote sonnets to assist his understanding of the classical readings. These are authentically written in the styles of poets from Petrarch to Shakespeare. Each sonnet employs iambic pentameter to propel it along rhythmically and consists of three stanzas followed by a doublet that drives home the point. Also included is a sonnet by Phyllis Wheatly. The sonnets function as a sort of Petrarchan Cliff's Notes, pithily distilling the concepts of Rosen's readings. Because he has so selectively queued up the most important readings for the reader, there is no need for the reader to spend time going all the way back to the sources, although that door is open for further exploration.

While reading *The Pursuit of Happiness*, the role religion has played in purveying classical moral philosophy became clear. Indeed, the two fields have been closely intertwined and even blended throughout history. Classical moral philosophy can sound a lot like

the wisdom literature of the Bible's Old Testament. Franklin found that Cicero and Solomon could serve as a powerful duo for training in moral character (p. 33). Classical learning was prominent in the colleges and seminaries of the eighteenth century, continuing the trajectory of thinkers such as Boethius, Augustine, and Aquinas. Many colleges of the time, such as Princeton University, were originally founded for the training of clergy. Rosen writes how he first encountered Franklin's list of virtues through the writings of Rabbi Menachem Mendel Lefin on the recommendation of another rabbi (p. 2). The founders' perceptions of ancient and Enlightenment philosophers were fused with a world view that was broadly biblical, regardless of the strength of their personal devotion or denominational attachments (p. 206). Some were relatively devout; for example, Washington, who was active in his parish, had a disciplined private prayer life and even wrote prayers of his own. Others had a more individualistic approach to religion, such as Jefferson, who literally cut and pasted his own edition of the gospels (p. 204).

Rosen does not gloss over the fact that the founders made mistakes and were not perfect people. Chiefly, he examines Jefferson's involvement with slavery in some depth, and he documents other personal failings of the founders, as well. The purpose of this exercise is not to discourage the reader but rather to show how the pursuit of happiness was always an ongoing effort rather than an end state. The founders struggled and they frequently failed, but they continued to work toward the realization of their ideals.

Rosen shows how the pursuit of happiness has defined America from the beginning. Education and training in virtue was not only an essential part of our heritage as Americans, but until fairly recently it was considered foundational for thriving and being a good citizen and was part of the educational system. This may sound strange to modern ears, but up until the 1950s, Americans received some sort of basic formation in biblical and classical moral reasoning in public schools (p. 271). Although public education has changed, the U.S. Navy and Marine Corps are institutions where classical moral philosophy is still being celebrated and maintained today.

Whether that is conveyed through the Stoicism of pilot-philosopher Admiral James Bond Stockdale or simply core values and leadership traits, the essential ideas of classical writers seem very familiar. When I served on the staff at the U.S. Naval Academy from 2015–18, the chaplains were presenting a Plebe Summer class on the virtue ethics of Aristotle. In a nutshell, the idea was that our purpose in life as human beings is to find our true end, which is happiness, attained through a virtuous life. In Rosen's book, I was happy to learn the rest of the story and to see that these ideas of human flourishing have defined America from the very beginning (p. 7).

One does not have to look very far in Marine Corps training and education to find our own lists of virtues, such as the core values of honor, courage, and commitment, or the leadership traits of justice, judgment, dependability, integrity, decisiveness, tact, initiative, endurance, bearing, unselfishness, courage, knowledge, loyalty, and enthusiasm. Marines and sailors learn orderly ways to spend their time and are taught to intentionally pursue physical, mental, moral, and spiritual fitness. This is supposed to enable them to overcome personal adversity, to thrive as human beings, and to survive the hedonism and moral ambiguity of popular culture. Many enter the Service with some sort of religious worldview, to which they add the culture of the military. I have observed Marines who read from both their Bible and their Daily Stoic. Others may enter the Service with a deficit in moral formation but find that the military opens the door and furthers their development. The intended audience for Rosen's book is any American who is interested in having an experience of the country's founders while learning to be a better person and a better citizen. As Marines constantly strive to be the best human beings, citizens, and professional warfighters that they can be, this book will definitely be of great interest to them.

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Rich Myrick, PhD

The Military Legacy of Alexander the Great: Lessons for the Information Age. By Michael P. Ferguson and Ian Worthington. (New York: Routledge, 2023. Pp. 370. $144.00, cloth; $29.59, paperback and e-book.)

Drawing lessons from military history for application in present and future conflicts is the *sine qua non* of military studies, but it is no less fraught for its ubiquity. In *The Military Legacy of Alexander the Great: Lessons for the Information Age*, Michael P. Ferguson and Ian Worthington take on one of the most difficult of such interpretive challenges in their choice of Alexander of Macedon as their subject and his lessons for future warfare as their object. As a well-known figure of antiquity, Alexander is justly famous for his spectacular conquests but also elusive due to his short life and the incomplete and often unreliable nature of ancient sources. Studying Alexander's conquests requires examining his failures as well as his successes, and his accomplishments and methods present complicated moral and ethical questions concerning wars of conquest and political intrigues. Clearly, any such investigation must establish for current audiences the relevance of actions that took place long ago and in a very different political, social, and technological context. While acknowledging these inherent difficulties, Ferguson, a scholar and military professional, and Worthington, a professor of ancient history, approach their interpretive task by focusing on Alexander's leadership and flexibility in overcoming combat and cultural challenges despite his mistakes and flaws. Most importantly, the authors argue that historical studies are a window into the ever-present human element that is often neglected in the twenty-first century due to the dominance of technocratic thinking. The result of their efforts within these confines is an interesting and useful study that is successful in presenting observations and insights directly applicable to warfare today.

The Military Legacy of Alexander the Great is presented as 14 chapters grouped into 5 thematically arranged parts. After a helpful introductory chapter that emphasizes the purposes of the book within the already-extensive literature concerning Alexander the Great, parts one and two provide background to Alexander's rise, the nature of Greek warfare, and the organization and impetus that propelled the Macedonian expansion. The bulk of the book's text (a full eight chapters) is contained in parts three and four, which outline Alexander's campaigns chronologically while tying historical events to enduring issues such as command and control, the fog of war, and the complications of expeditionary warfare. Part five brings these thematic threads together in an analysis of Alexander's leadership as a general and grand strategist, connecting ancient challenges and solutions to those of the twenty-first century. The brief concluding chapter is provided by H. R. McMaster, who argues for the book as an exemplar of a necessary reemphasis on a deep and critical study of history that reconnects military professionals with the human element of war as well as a dose of humility and reality in the current technocratic age.

This is a work that combines detailed accounts of Alexander's campaigns with parallel assessments of more recent conflicts, using both sets of examples to illustrate the unchanging nature of human factors in warfare despite vastly different cultural, political, and technological conditions. The authors acknowledge the difficulty of using ancient accounts, which are often limited, fragmentary, anachronistic, hagiographic, or otherwise requiring interpretation and contextualization to be of use as sources. Nonetheless, the book centers on events that are as well attested and accu-

Dr. Rich Myrick is a retired lieutenant colonel of the U.S. Marine Corps and a James C. Carey research fellow with the Department of History at Kansas State University in Manhattan. His research interests include early modern and modern Europe and military history.

rately presented as would appear possible under the circumstances. For readers, the historical examples are fascinating in and of themselves, but the greater value of *The Military Legacy of Alexander the Great* are the themes that tie them together. Among the themes Ferguson and Worthington explore are three that exemplify the rest in linking historical analysis with an assessment of current challenges.

First, in assessing Alexander's early campaigns that culminated in the conquest of the Persian Empire (part three), the authors highlight how the Macedonians were able to succeed under constantly changing conditions and in increasingly unfamiliar environments. While noting the cohesion and leadership necessary to accomplish this feat, the more enduring lessons are drawn not from structures or tactics but from the process of information flow. In short, combat is confusing and the fog of war forces leaders to make critical decisions with limited information, an observation quite common in the analysis of warfare. The further observation expounded by Ferguson and Worthington, however, is that while technology has allowed information today to be processed and communicated in near real-time, the advantage has been offset by the sheer volume of information, both in planning and execution of military operations. The lesson drawn from Alexander's campaigns as applied to the twenty-first century is that the tendency toward complexity in planning should be resisted. Rather than overloading operators with information, operations should be simplified.

Second, the authors analyze Alexander's campaigns in Central Asia (part four), stressing new challenges encountered as the Macedonians ventured even further from Greece. Notably, while Persia was a significantly different culture than their own, the Macedonians were quite familiar with the centralized Persian civilization through centuries of interaction and conflict. However, Central Asia was much less familiar, and what had been primarily a military campaign became a cultural challenge as well, with decidedly mixed results. After providing the historical context both ancient and modern, Ferguson and Worthington draw lessons from the deep past to reflect on the recent past on the complications of expeditionary warfare. Certainly, Alexander's army faced similar cultural challenges in central Asia as those encountered in the past two decades. More pointedly, the authors point to the glaring lack of cultural preparation in recent conflicts to emphasize the cost of poor preparation and reliance on technocratic solutions in modern warfare. When the human element is neglected, no amount of technological sophistication will produce any more sustainable success than Alexander was able to achieve.

Third, Ferguson and Worthington conclude the book with an assessment of Alexander's grand strategy (part five) in long-view, civilizational terms. The authors emphasize that grand strategy, rightly understood, requires decisions based not just on current needs but on a generational scale, with a level of consistency and foresight uncommon in twenty-first century thinking. As such, the elements of grand strategy are not simply a checklist of political, military, economic, cultural, and diplomatic assets to guide and support operational success, or even a coordinated civilizational undertaking of means and ends. Rather, grand strategy emerges from an analysis of Alexander's conquests as bound together with the national common good, and its success is assessed by its benefit to the nation and its people for generations to come. In other words, the lesson from Alexander's conquests is that the old and often discarded virtues of prudence and patience remain at the heart of a wise grand strategy. For the authors, Alexander failed this test, and by inference his failure has been repeated in the twenty-first century as well. Among the many insights contained in *The Military Legacy of Alexander the Great*, this observation about the nature of grand strategy is the most profound because it defines the ultimate purpose for all other actions.

Michael P. Ferguson and Ian Worthington have provided not just a cogent assessment of Alexander the Great's applicability to twenty-first century leaders, but a framework for assessing other leaders and events in history as well. Presented in accessible prose, *The Military Legacy of Alexander the Great: Lessons for the Information Age* will certainly appeal to general

audiences. As a synthesis of ancient history and the operational art it will also appeal to military historians and students. However, the authors are clear that their intent in writing the book was to provide national security professionals with a new approach to assessing the operations of the recent past and strategic planning for the immediate future. To this end, they have produced an excellent resource to stimulate thinking about the links between the means and ends of grand strategy in the twenty-first century. Highly recommended.

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Lawrence Provost

Afghanistan: A Military History from the Ancient Empire to the Great Game. By Ali Ahmad Jalali. (Lawrence: University Press of Kansas, 2021. Pp. 392. $59.95, cloth; $54.99, e-book.)

Afghanistan: A Military History from the Ancient Empire to the Great Game by Ali Ahmad Jalali is a scholarly history of the longest, though often-forgotten, period in the lore of Afghanistan. The first volume of a two-volume series, *Afghanistan* is written in chronological order in short chapters, with each chapter broken down into short sections. This is helpful for those who have difficulty with the subtleties of a region of the world that few still understand despite 20 years of open U.S. military operations from 2001 to 2021 and 10 years of Soviet (and American) involvement from 1979 to 1989.

While *Afghanistan* looks at the social, cultural, and other factors influencing the nation as it exists today, the text is still primarily one of war. Conflict is the dominant force in Afghan history, as much as Islam has been since it spread to that nation. The cast of international warrior characters in *Afghanistan* runs from the Assyrians, Alexander the Great, Arab tribes, Persians, Mongols, Turks, Uzbeks, and others. Many of these nationalities, their descendants, and variances within are seen in today's Afghanistan.

Perhaps surprisingly for a nation that is so defined by its Islamic history and identity, the largest section of *Afghanistan* deals with the conquest and reign of Alexander the Great and the other Greeks. Alexander was a great leader in battle but a poor administrator who relied solely on military government to rule over conquered lands. Alexander's rule was based off one thing: his ability to stay alive. The death of Alexander the Great not only brought about the end of the Greek tenure in Afghanistan but also accentuated Afghanistan's already strong tribalism. The greatest legacy of Alexander's reign was that it represented the beginning of major powers warring over Afghanistan.

Situated in Central Asia between the Middle East, India, post–Soviet Republics, and China, Afghanistan has seldom been the final objective for armies but rather a stopping point on the way to another location. The crossing of armies through its mountains, plateaus, and plains has contributed to a spirit of warfare in Afghanistan. The Arab conquests brought Islam into Afghanistan, replacing Zoroastrianism and Buddhism as another dominant cultural force.

Afghanistan culminates during the Durrani empire, which lasted from 1747 to 1842. The Durrani empire was founded by Ahmad Shah Durrani, the father of the modern Afghan nation-state. The empire was quite large, engulfing nearly all of modern Afghanistan and Pakistan as well as a not-inconsiderable portion of eastern Persia. Ahmad Shah reigned for 26 years and his death in 1772 signaled the beginning of the end of the empire, although his son and successor Timur Shah did a decent job in reigning from 1772 until his death in 1793. After Timur Shah's death there was no turning back for Afghanistan to remain truly free and independent. Even if rulers such as Ahmad Shah had remained as the emir of the Durrani empire, Afghanistan's position between the British and Russian empires rendered its situation as tenuous.

There are several things that make *Afghanistan* stand out. Unlike most books about this nation whose history is mired in warfare, *Afghanistan* contains maps of battles as well as thoughtful military analysis. The author, Ali Ahmad Jalali, is a former colonel in the Afghan Army, solidifying the credentials of the text.

Lawrence Provost is the Veteran Service Organization liaison for the National Cemetery Administration in Washington, DC. He served in Afghanistan from 2002 to 2003 and in 2011 as a civil affairs sergeant and later received his master's degree in defense and strategic studies from the U.S. Naval War College. The views represented are his alone and should not be attributed to those of any government agency.

Things change often in Afghanistan, and most Afghans may be so uneducated as to have no idea of their national history. Even today, some Afghans still may never substantially leave their villages during their entire lifetimes. Some military and political figures will question why such a book even matters at this point, with the seeming shift toward large-scale combat operations—yet, we often find that the more things change, the more they stay the same. The influx of terrorism, Chinese interest, and a history that shows its continued relevance, Afghanistan is not a nation to be abandoned in thought or deed.

Although titled as a military history, *Afghanistan: A Military History from the Ancient Empires to the Great Game* much succeeds in that genre. While not a popular history, the text is valuable for studying large-scale incursions as well as smaller unit tactics in a very inhospitable environment, rendering itself useful most especially for the military historian as well as the military professional, particularly those in command and specializing in unconventional warfare (i.e., Special Operations Forces, Marines, etc.) as well as in other agencies such as the Department of State and the U.S. Agency for International Development (USAID).

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Andrew Salamone, PhD

Naval Presence and the Interwar US Navy and Marine Corps: Forward Deployment, Crisis Response, and the Tyranny of History. By Benjamin Armstrong. (New York: Routledge, 2024. Pp. 100. $55.99, cloth; $21.59, paperback and e-book.)

In his recent work, *Naval Presence and the Interwar US Navy and Marine Corps*, Benjamin Armstrong presents the reader with a short survey of the activities of the sea Services between 1920 and 1939. Armstrong seeks to counter the existing historical narrative, which he terms the *tyranny of history*, that has long portrayed the interwar Navy as a "garrison navy" that focused almost exclusively on the doctrinal and technological advancement that proved instrumental in helping win the Second World War (p. 8). Instead, Armstrong argues that American sailors and Marines were part of a "globally deployed, operationally active, and strategically vital force that conducted a variety of peacetime operations critical to safeguarding the country's interests" (p. 8). Chapters are arranged chronologically, each providing a year-by-year sketch of peacetime operations in theaters including the eastern Mediterranean, western Pacific, and the Caribbean. Students of American naval history will find Armstrong's overview of naval activity during this period a useful introduction to the topic and, more importantly, a source of ideas for more in-depth scholarly exploration of the ways in which the sea Services contributed to American security during these pivotal decades.

Armstrong bases the book on the Secretary of the Navy's annual reports to the president and Congress as well as annual reports from the Chief of Naval Operations and the Commandant of the Marine Corps. He acknowledges that these sources can be somewhat problematic for use by a historian because they were political documents that in many cases were meant to influence Congress for budgetary purposes. Nonetheless, he argues that the types of activities Navy and Marine Corps leaders highlighted in these documents reflected the broader strategic priorities of America's civilian leaders. He briefly discusses the impact that changes such as the 1934 creation of the Fleet Marine Force and passage of the Vinson-Trammel Bill had on the sea Services, although such interruptions are largely side notes to the broader operational narrative he chooses to follow. Armstrong concludes his brief survey of the peacetime activities of the Navy and Marine Corps by noting the passage of the 2023 National Defense Authorization Act, in which Congress changed the Navy's mission to include a statement on the "peacetime promotion of the national security interests and prosperity of the United States" (p. 86). Armstrong contends that this updated mission statement has brought the Navy back to the roles it performed during the interwar period, and he asserts that the successful execution of this new mission hinges on a deeper understanding of our naval past.

Overall, Armstrong's *Naval Presence and the Interwar US Navy and Marine Corps* helps fill an important gap in the historiography of the Navy and the Corps. The book's narrative format is digestible, although somewhat repetitive, which is more a symptom of the continuity of Navy and Marine Corps operational activities in key areas of responsibility such as the Caribbean than a reflection of Armstrong's ability. He also provides some useful guidance for scholars seeking topics to examine, stating that an "analysis of the long-term political and cultural results of the navy and marine corps forward presence and peacetime operations during the 1920s and 30s is a project still to be written" (p. 83). Scholars seeking to focus on that project will find this volume an outstanding resource for beginning that work.

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Dr. Andrew Salamone is an independent scholar living in Northern Virginia. He is currently working on a book analyzing the changing content and tenor of Independence Day celebrations in Alabama, Louisiana, and Mississippi between 1820 and 1906. His other academic interests include the study of strategic culture and British colonial history in South Asia.

Lieutenant Colonel Quincy Washa

First in Last Out: The Post-war Organisation, Employment and Training of Royal Marines Commandos. Edited by Paul Winter. (Havertown, PA: Casemate Publishers, 2021. Pp. 216. $34.95, cloth; $20.95, e-book.)

First in Last Out is a welcome addition to the historiography of post–World War II British military nonfiction that combines modern scholarly commentary with a military tract of historical utility. The featured document explored in this book, titled *Amphibious Warfare Handbook No. 10a: The Organisation, Employment and Training of Commandos*, is a previously forgotten piece of Royal Marine Commando literature that has, until this point, never been publicly released. Dr. Paul Winter, a historian and affiliated Royal Marines Commando academic, seeks to draw attention to this relatively obscure Service handbook first issued in 1951 and recently rediscovered in the British National Archives. Classifying it as a "half-breed" piece of doctrine, he attempts to discern the document's institutional context in a post–World War II world and the *raison d'être* for those who compiled the handbook's contents constructed within the framework of their military experience and institutional concerns.

First in Last Out is separated into two distinct sections. The first section opens with Dr. Winter's introduction that not only captures the historical consciousness of the Royal Marines and their international operational environment up through the present day, but it also offers doctrinally helpful explanations and definitions relevant to the training and operations discussed throughout the book. The second half is the *Amphibious Warfare Handbook No. 10a* handbook itself, enhanced with diagrams, historical photos, and sketches demonstrating the tactical instruction provided throughout its pages.

The handbook is divided into three themed parts. Part one covers the distinctive role that commandos are expected to fulfill pertaining to amphibious warfare, how they are to be organized, and what types of operations they are expected to undertake. Part two focuses on commando recruitment considerations, selection, general and advanced training skills, and considerations for training reservists. Part three, the most technical section of the handbook, provides an overview of amphibious techniques inherent to the different types of assaults, raids, landings, and evacuations that commandos are expected to undertake. Throughout the manual, Dr. Winter provides footnotes with clarifying details drawn from other historical references that add to the reader's overall understanding of the material.

Initially issued 70 years ago, *Amphibious Warfare Handbook No. 10a* is the product of a shifting global order that seeks to capture wartime lessons learned and operative memories garnered by the British Combined Operations Headquarters during World War II while simultaneously serving as a testament to the unique and specialized skill sets and capabilities that distinguished commandos from their traditional Army counterparts. In his introduction, Winter does a commendable job of superimposing the handbook's publication against the historical and strategic environmental backdrop that the Royal Marines faced following several frustrating experiences during the Korean War and the rising perception of a possible Soviet invasion of Western Europe, while also contending with the realization that amphibious operations in the nuclear era may no longer have a future. Facing a renewed existential threat born of government defense reductions, fiscal restraints, inter-Service politics, and organizational reform, the Royal Marines were confronted by a growing institutional crisis that

Quincy M. Washa is a lieutenant colonel in the U.S. Marine Corps Reserve, currently serving as a field historian with Marine Corps History Division. She holds a bachelor's in history from the Virginia Military Institute and a master's in the history of science, technology, and medicine from the University of Minnesota in Minneapolis. A veteran of Afghanistan and Iraq, she presently resides in Northern Virginia.

would compel them to reckon with the challenges of force configuration and interoperability across the whole of the UK armed forces. These concerns were not localized in the United Kingdom—the U.S. Marine Corps underwent a similar existential reckoning after World War II.

Even though the handbook is historically noteworthy and of cultural military value, it is relatively pithy in its 145-page presentation and readers should not expect in-depth instruction or elaboration on many of the topics and techniques discussed. While being mindful of the historical timeframe that this document was first published, many will also notice that much of the instruction on military landing craft and vehicles is dated. There is also a curious absence of references to more modern technology, particularly that of aircraft and airborne assets, that had been fielded and developed by the end of World War II. Notwithstanding these omissions, enduring themes to the military experience form the foundation of the handbook's instruction. This includes the pamphlet's appendices that contain longstanding, practical advice that will be familiar to most military veterans, such as the principles of packing a carrier load, the speed and rhythm of a march, notes on how to prepare oneself to live in a field environment, selection of bivouac sites, and considerations for types of footwear depending on the operating environment. In addition to this tactical guidance, the end of the handbook also includes an overview of the intangible qualities and characteristics that a Royal Marines Commando should seek to embody—such as moral courage, integrity, loyalty, and humility—as well as an explanation of the mindset they are expected develop to carry out missions in any clime and environment.

While *First in Last Out* may primarily appeal to scholars and enthusiasts of military history, its commemorated instruction and particularly Winter's insightful prologue offer valuable content for a broader audience. Those intrigued by the mythos surrounding

the Royal Marine Commandos will find useful material to engage with, as the text delves into the revered spirit and storied history of this elite force. Moreover, the manual proves remarkably relevant to national security professionals and policymakers alike concerned with contemporary military issues, especially those focused on how armed forces must adapt to the rapidly changing landscape of national defense. It provides historical context for understanding how military organizations have grappled with similar challenges in the past, offering lessons that remain pertinent today.

For U.S. Marines, the historical reflections embedded in this account will strike a familiar chord. The similarities between the Royal Marine Commandos and their American counterparts are numerous, and this text offers constructive insights into the shared experiences of institutional survival and organizational challenges faced by both naval Services as they enter the twenty-first century. However, this manual, along with other literature expounding on the specialized attributes of Marines, serves as a powerful testament to their enduring importance and captures the unique ability of Marine forces to project combat power from the sea, a capability that remains crucial in today's complex global security environment. Ultimately, *Amphibious Warfare Handbook No. 10a* transcends its original purpose as a military manual to become an unexpected source of historical insight and a celebration of the enduring spirit of Marine forces.

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