ENGAGEMENT BETWEEN PEACE AND WAR:
How Soldiers and Military Institutions Adapt

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Engagement between Peace and War:
How Soldiers and Military Institutions Adapt

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Technical Abbreviations

3D   Whole of government approach in reference to Diplomacy, Development and Defence
A2AD Anti-access/area-denial
ADO  Army direct ordering
AOC  Army operations course
BMQ  Basic Military Qualifications
CAF  Canadian Armed Forces
CVE  Common vulnerabilities and exposures
DND  Department of National Defence (Canada)
DOD  Department of Defence (United States)
DP2  Development Period 2
HSEC Health, safety and environment community
NATO North Atlantic Treaty Organization
PME  Professional military education
PRTs Provincial Reconstruction Teams
SRD  Schéma de Développement Régional – Regional Development Scheme
US   United States of America
Key Insights

The future security environment is complex and fluid
We are moving towards a de-structured world of complexity and adversity. Grey Zone, economic, cyber, space and environmental threats will persist and pose cognitive, political, and resource challenges. The space between war and peace is complex and ambiguous, and actors must be agile and adaptive, learning to think strategically but also learn within this dynamic environment. Complexities also exist internally as militaries navigate more complicated relationships with the societies they serve.

Flexibility, agility, and adaptability will be required to rapidly respond to emerging peace and security threats
Agile responses to hybrid warfare threats have been slow as a result of the tradition-bound nature of our organizations. Adaptability must be possessed by soldiers and institutions. Adaptability requires partnering for preparedness prior to warning signs. In adapting, we must be cognisant of the danger of being overwhelmed by complexity and falling into a loop of reflection without making progress.

The Grey Zone will be a profound piece of the puzzle in how we consider operations
Describing - rather than defining – the Grey Zone is imperative to allow for flexibility of the term, as this complex conflict area is continuously changing.

We must change the way we teach, train, and employ leaders
Our ability to think critically, creatively, and have understanding of context - from senior leadership to individual soldiers - will lead to strategic success. Technology will be critical for education and adaptive training as it provides innovative and efficient cognitive and physical human performance optimization. The development and nurturing of strategic competencies within leadership provides a space for the integration of issues increasing in prevalence, such as gender, spirituality, and the environment.

A whole-of-government approach is necessary to adapt to the changing security environment
Adapting to emerging security challenges requires a broad, interdisciplinary approach that should not be left solely to the military. A collaborative effort involving civil society, military, law enforcement and political actors is required to approach security challenges. However, disconnections between military and political objectives prove to be a barrier to strategic success. Creating a culture of organizational, operational and institutional excellence requires the selection of personnel in key leadership positions that can build relationships with other whole of government partners.

A whole of partnership approach is desired, but faces operationalization challenges
A transnational, whole of partnership approach provides political balance at home and abroad, and is required to sustain mutual supports and interests. Defence and intelligence communities such as NATO and The Five Eyes face institutional adaptation challenges, such as being locked in reactive rather than proactive patterns. Adversaries are challenging the seams of these organizations, moving to areas where alliances do not wish to engage and concentrating on our perceived strengths to generate weaknesses.

We must think in terms of resiliency
Resiliency requires interagency cooperation that goes beyond peaceful coexistence. When we consider strategic success, we must think in terms of sustainable and resilient objectives. Proactive information sharing, strong economies, human capital investment, as well as the integration of cultures, personalities, communications and intellect will be the foundation of a resilient strategic future.
Day I: June 14, 2016

Conference Introductions

Dr. Stéfanie von Hlatky\textsuperscript{1} opened the conference by noting the professional diversity of the panels, highlighting that all sectors are represented by design. Dr. von Hlatky introduced the conference topic of hybrid conflict, noting that although hybrid conflict is not new, the ways in which information and technology are utilized for the coordination and dissemination of information results in actors who use a wide range of conventional and unconventional tactics. Hybrid conflict requires calibrating a response to threats through a multisector approach that does not impact collective norms and values, but which also requires resilience. This increasingly complex space – known as the grey zone of conflict – will require the building of adaptive professionals, emphasising in particular the importance of military education and training.

Challenge to the Conference

Major-General Jean-Marc Lanthier\textsuperscript{2} highlighted how the security environment is evolving quickly, defying trends, and is non-linear. In doing so, he provides examples of trends occurring across security domains, including consistent technological change. Major-General Lanthier highlighted the importance of tracking cyber-attacks as well as the increasing accessibility of and adaptation for unintended usage of technology. Other notable trends to monitor included the increased number of actors willing and able to use organized force, and rising inequality as intersecting factors. In discussing these trends, Major-General Lanthier highlighted how conventional warfare is back, but new and improved. He cautioned the audience that hybrid warfare is neither new nor modern, and to consider the ramifications of compartmentalizing problems as this does not find a solution.

As a result, close engagement through information gathering and collaboration with development agencies must be considered. Major General Lanthier challenged the conference to 1) define this increasingly complex and fluid security environment, noting that this fluidity of the security environment will require the flexibility and agility of armed forces to adapt rapidly to changing circumstances 2) consider gaps in professional development, how to educate for these “unknowns” and consider how this impacts institutions 3) question if we can learn differently, educate and employ leaders, and what strategies and policies are required to do so 4) consider how we approach these challenges globally and in a multi/transnational forum 5) consider how we improve our understanding our environment faster and ultimately, 6) considers ways we can adapt to be in advantageous positions.

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\textsuperscript{2} Commander, Canadian Army Doctrine and Training Centre
Opening Keynote Address

Lieutenant-General Guy Thibault\(^3\) began by acknowledging that we are not likely to find ourselves at peace or at war in the conventional meaning going forward. Rather, we are in a state of persistent conflict which influences how states will adapt. Lieutenant-General Thibault suggested that adaptation should not mean fundamentally changing the ethos or culture of the CAF, but rather adapting the way of thinking about the utility of military power, the capacity to deal with security environment, and adapting partnerships and alliances in order to be effective in the future. Stressing that the CAF culture cannot be static or unchanging, Lieutenant-General Thibault suggested considering the changing landscape of Canadian society.

In discussing the defence policy review, Lieutenant-General Thibault noted that defence policy must be credible, outline the key roles of the CAF, and suggest areas to improve upon. He continued by outlining the changing nature of operational arrangements. In particular, how the role of NATO and a commitment to alliances will frame an important part of continuing engagement for the CAF. In addition, the responsibilities of daily and persistent domestic challenges must be taken into consideration, which requires retaining capacity for other government priorities.

Lieutenant-General Thibault acknowledged that the operating environment is changing quickly, and the notion of clear winners and losers does not apply to the contemporary context. As a result, how we measure success is a challenge as we attempt to consolidate social, political, and economic factors. Despite the military having unique capabilities, it must adapt to understand that additional actors will be required for success. In particular, Lieutenant-General Thibault recommended an attentiveness to how we can orient ourselves to adapt towards increased involvement in conflict prevention, management, and termination. Although the prevention of conflict is the ideal, if we cannot wholly prevent conflict we must be able to better manage the effects. Lieutenant-General Thibault proposed a range of options, such as preventative actions, coalition building, and framing part of military thinking for governments to allow for appropriate engagement of military solutions. Lieutenant-General Thibault proposed that if horizontal coordination in the form of a whole-of-government approach is implemented, as well as alliance and coalition forces utilized, the CAF will be able to operate with anyone anywhere anytime.

Lieutenant-General Thibault proposed adaptation in three key areas, namely: 1) interoperability and building links with all levels of government and allies, 2) better intelligence to understand and win during modern conflicts, 3) understanding conflict, and how and why players influence conflict, and 4) organizing our capabilities. Lieutenant-General Thibault noted that while the CAF has an important role, vulnerabilities in space and cyber domains are not solely effecting the military. As a result, a whole-of-government approach in conjunction with interoperability is essential.

\(^3\) Vice Chief of Defence Staff, Canadian Armed Forces
Panel I – The Evolving Security Environment: Threats and Strategies

The first panel provided a multi-sector assessment of how organizations respond to emerging security trends and threats. The panel was chaired by Dr. Alex Wilner, who opened the panel by providing a snapshot of the broadening security environment and how different organizations gauge their responses to these developments. Dr. Wilner highlighted four different directions of the panel, noting the nexus between counterterrorism and the international law of armed conflict; corporate security from Rio Tinto and how to mitigate security risks; the nature and tradition of separation between law enforcement and military in crisis response, and finally NATO’s role and member states’ economic strengths.

Andrew Carswell began by describing the International Committee of the Red Cross (ICRC), which focuses on the protection and assistance of humanitarian beneficiaries of armed conflict from a position of neutrality and impartiality. Mr. Carswell framed his presentation first on the rhetoric of Common Vulnerabilities Exposures (CVE) and counterterrorism and how this overlaps with protected person categories of the law of armed conflict. Mr. Carswell noted that discussions of counterterrorism and CVE are interspersed throughout the law of armed conflict and cautioned that with counterterrorism, a label is generally applied to a group, giving a title of criminality regardless of their actions. When speaking with key groups/parties, Mr. Carswell noted that the ICRC navigates several fundamental challenges which include state sovereignty, the issue of material support to terrorism, and the ownership of obligations and how this changes in non-international conflict. The ICRC as a result must consider legitimacy of groups while being non-partisan, in addition to amnesty for participation in hostilities.

In considering state’s adherence to the law of armed conflict, Mr. Carswell noted the practical issue of how to integrate the law into practice. He suggests this involves the whole system, including policy, education, field training, and justice. In consideration of Western counterterrorism, the ICRC takes issue with the growing tendency of armed forces to increase the ability of commanders to make the call as to who is a member in non-state armed groups. Additionally, the ICRC is concerned with non-refulment, which is refraining from releasing detainees to states that are likely to mistreat them. Canada was considered the model of practice of the ladder, following the conflict in Afghanistan. Acknowledging the tension between the scope of battlefields being largely non-international and the law of armed conflict which emphasizes territory, Mr. Carswell raised the issue of when a conflict becomes a local law enforcement problem. This leads to a grey area in which the circumstances must be considered. Mr. Carswell concluded by noting that there is a time and place for counterterrorism, but not during the discussion on the rights and obligations of individuals on the laws of armed conflict.

Almero Retief discussed security risk analysis and management in the mining sector, using the case study of Rio Tinto’s approach to security. The focus of Mr. Retief’s discussion was how Rio Tinto as a company approaches security risk analysis in the changing security environment in order to manage and mitigate risk, as people’s safety and the communities Rio Tinto engages

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4 Assistant Professor, Norman Paterson School of International Affairs, Carlton University  
5 Senior Delegate, International Committee of the Red Cross  
6 Group Security, Risk and Human Rights, Rio Tinto
with are the first concern. Mr. Retief noted the triggers for the requirement of a revised approach to security as a result of staff reductions in the group security team, and the Health, Safety and Environment Community (HSEC) requirement for a better alignment with a safety risk approach. Mr. Retief began by describing the roles of the different teams that constitute and operationalize the New Security Operating Model. The HSEC team protect people, assets, information (non digital), and reputation by applying expertise and business enabling solutions. Structured across three regions, the team addresses four areas of implementation which include investigations, business and recovery, intelligence, risk and human rights.

In describing Rio Tinto’s steps taken to address these challenges, Mr. Retief noted that implementation is dependent on three components, which include a site profile, risk analysis, and the compiling of a risk analysis management plan to help mitigate security incidents. This move from a people-centric to process-centric approach allows for a stronger emphasis on stakeholder and community engagements, and ensures Rio Tinto has the social licence to operate. In outlining the Security Risk Analysis and Management Cycle, Mr. Retief defined security risk as a criminal or malicious act against the business that may cause harm to people, or result in damage. Mr. Retief noted that implementation is dependent on support and synergies from private security and public security actors, and stressed the importance of stakeholder engagement and benchmarking with likeminded industries, engagement with private and public security agencies, sharing of internal lessons learned and working on a continuous improvement model. Mr. Retief noted the implementation of the Risk-Based Security Operating Model at the group level (strategic) and site level (operational), and emphasized that solutions must be driven by procedures, processes, risk definition, controls, tools, and training that allows for standardized, fit-for-purpose implementation, prevention and recovery.

Professor Bert Tussing\textsuperscript{7} focused his discussion on the relationship between military and law enforcement, differentiating where the relationship currently stands and how it will need to evolve in the future to address the changing security environment. Highlighting citizen’s expectations that there must be a distinction between the two roles, Professor Tussing argued that - as recognized in the ethos of the Magna Carta – the military seeks to be the servant of the people and never the over-seer. Although there have been instances where the military has served in a constabulary function, this often came at the behest of civil authorities. Using the example of the Los Angeles riots in 1992, Professor Tussing highlighted the military response to restore security at the beckon of the Governor of California, as well as the implementation of the easiest withdrawal possible through the planning of an exit strategy. Professor Tussing argued that considering future potential catastrophes will demand a re-examination of the roles of the military and law enforcement. Using a 2011 national-level exercise, the DOD considered the potential consequences of a major earthquake event in the US. Noting the high devastation that would occur as a result of diminished power, Professor Tussing provides recommendations to these potential catastrophic incidences. Despite being able to free passage of flow of information overseas, one of the main challenges facing the militaries in the US and Canada is the ethos not to constrain or compel citizenry.

\textsuperscript{7} Director, Homeland Defence and Security, US Army War College
Professor Tussing’s proposed solution required the creation of a secure environment for restoration to occur, which would involve deliberative planning. The deliberate planning process would require taking into account our actions for events we would hope to never happen, but must be prepared for. Based on studies conducted, Professor Tussing has been able to outline what resources would be required at the time of catastrophes. These include the ability for the law to allow for joining jurisdictions, and for the core competencies of military to supplement current structures. Professor Tussing concluded by challenging the audience to look into our own communities and examine how well-prepared they are for a potential catastrophe.

Diego Ruiz-Palmer provided an overview of the security challenges for NATO in an age of asymmetry and rapidly evolving international environment. Noting that we cannot maintain enduring security without economic resilience, Mr. Ruiz-Palmer highlighted interconnected emerging asymmetries such as military, economic, and ideological. As a result of these asymmetries, one of the major issues facing NATO and the West is whether we are prepared for the move from a world of complexity to one of adversity. Using examples such as the Russian Periphery, Arab Spring, and the rise of ISIL, for military asymmetries, Mr. Ruiz-Palmer noted there is a new zone of risk called hybrid warfare. In highlighting growing adversity in economic terms, Mr. Ruiz-Palmer noted that we are still emerging from the worst economic crisis since the end of the war. Mr. Ruiz-Palmer reminded the audience that while the 2007 crisis was triggered by financial crisis in US, it exhibited and exposed vulnerabilities such as government’s increasing entrance into systematic deficits, and China’s declining growth. Mr. Ruiz-Palmer argued that diverging economic trends and negative feedback loops - between developed and emerging economies, across the Atlantic and within Europe – compromise enduring recovery and undermine alliance cohesion. In this, Mr. Ruiz-Palmer questioned whether affluence translates into influence in this rapidly evolving security environment.

The way forward, Mr. Ruiz-Palmer stressed the importance of Canada’s re-engagement in Europe and the desire to play distinct and recognizable role in Europe and NATO. As we are sitting on the cusp of a new strategic age, Mr. Ruiz-Palmer noted the importance of states reflecting on themselves and understanding our common resolve in military capacity. Mr. Ruiz-Palmer suggested that NATO armed forces will begin to transition from deployed to prepared, as the capacity to deploy large scale maneuvers has been lost due to two decades of operations and seven years of economic crisis. Mr. Ruiz-Palmer concluded by suggesting that NATO will remain an irreplaceable hub for lifting the defence capacity of all allies and for preparing them to act.

8 Special Advisor to the Secretary General for Economics and Security, NATO Headquarters

The second panel was chaired by Dr. Rachel Remington and provided a military perspective of security trends and emerging threats during different stages of conflict.

The panel opened with Nathan Freier and his presentation on how to regain strategic initiative in the grey zone. Mr. Freier began by acknowledging that the US has entered a period of persistent competition and conflict that will not decrease, and that his study sought to describe the primary characteristics of the grey zone, how it poses threats to interests, outline most the most disruptive emerging threats, and identify specific defence opportunities. In testing the hypothesis that the grey zone was becoming a pacer for defensive military strategy and that it would create wicked strategic planning dilemmas going forward, Mr. Freier highlighted implications for strategy plans and capabilities that we will continue to struggle with until militaries adapt. Three common characteristics of grey zone threats included hybridity, menacing threats that manifest in ways outside the standard, and risk confusion.

Mr. Freier then acknowledged the failed adaptive responses and assumptions of the US, and provided key solutions and considerations moving forward. These included the necessity to describe, rather than define the grey zone; dispensing of old assumptions that hinders US ability to cope; that paralyzing risk sensitivity and inaction is the highest-risk option; and the need for the DOD to adapt against grey zone challenges. Mr. Freier noted that adaptation and activism are primary in the grey zone, and that combatant commanders must be empowered to operate against a challenge.

Heather Hrychuk followed with her presentation on the challenges of aligning political and military objectives. Ms. Hrychuk acknowledged that the threats we are facing are lending themselves to cataclysmic wins and losses, and that the core problem that will continue are the challenges inherent with aligning political and military strategies and objectives. These objectives are unique in that political objectives involve the, “where we want to go,” the desire to protect the nation, and deliberates in terms of costs and risks. Ms. Hrychuk noted that these political objectives are critical to establish, and that since the object of war will not be concrete, these circumstances demand political intent and objectives which are ambiguous and allow for movement. In comparison, military objectives involve planning within this complexity and ambiguity. The military must accomplish the, “where we want to be,” and is based on specificity and consistency. Ms. Hrychuk posits that these inherent differences between specificity are difficult, and that actors are not able to set out clear political goals without military ones, but also that lacking precise political goals may result in military drift.

Ultimately, the reconciliation of objectives and the acknowledgement of differences between political and military objectives are essential. Ms. Hrychuk’s proposed solutions to addressing this challenge include providing a clear definition of political constraints and a clear assessment

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9 Directors for Transnational and Regional Intelligence, Canadian Forces Intelligence Command
10 Associate Professor, National Security Studies, US Army War College
11 Sponsored by the Army Capability Integration Centre.
12 Defence Scientist/Strategic Analyst, Defence Research and Development Canada
of military objectives; greater consideration of the military in short-term political desires; a nuanced understanding of threats; and that the military must be able to understand its role in a specific overarching strategy. Ms. Hrychuk noted that reassessment must occur often and regularly.

The panel was concluded with a presentation by Rear-Admiral Darren Hawco, who presented on Canada and the future security environment. Rear-Admiral Hawco first acknowledged that Canada’s most credible allies understand the context within which they do defence and security planning, and that Canada must emulate this practice. Noting the importance of foresight in Canadian defence planning, Rear-Admiral Hawco discussed the probabilistic future we face in terms of geopolitical, economic, and social trends and how military deductions are derived from these trends in the form of a Capability-Based Planning Process. In the Canadian context, Rear-Admiral Hawco stressed that Canada must consider relationships with the US, NORAD, NATO, and the Five Eyes partnership as enduring geopolitical concerns, as well as economic and social trends that can be themselves drivers of instability. Noting in particular the potential impact of technology in reducing our technological advantage, Rear-Admiral Hawco stressed this is a serious factor to plan for.

Going forward for the military, Rear-Admiral Hawco suggested the CAF will be called upon to be an enabler. He suggested the CAF must be imminently flexible and deployable, which can be constructed through army direct ordering (ADO). In addition, we must utilize our advanced capabilities of space and strengths with our allies, using a whole-of-government approach. Rear-Admiral Hawco recommended also utilizing the Integrated Capstone Concept which has been rewritten as the Joint Capstone Concept. Rear-Admiral Hawco cautioned against imposing changes on service cultures, but instead ensure service cultures create and reinforce joint capability.

Panel III – The Soldier: Defining and Generating Competencies

Chaired by Dr. Craig Stone, this panel considered personnel development through skill building, competencies, emphasis on the soul, and cultural and gender awareness required to adapt to the changing security environment.

The panel began with a presentation by Dr. Ann-Renée Blais on the topic of values congruence on early career attrition research. Noting that early attrition has been increasing - particularly in non-commissioned members – Dr. Blais sought to identify key causes of attrition in light of the considerable resources currently allocated to training. As a result, Dr. Blais’ research considered values congruence and the workplace and how these values are linked to attrition and identified the key drivers of early career attrition in CAF non-commissioned recruits. Dr. Blais’ methods included 1216 participants (largely male) completing electronic surveys in mass testing sessions at the CAF leadership recruit school during a thirteen-week
basic military qualification (BMQ). Key findings from Dr. Blais research include how relationships to attrition are driven by a lack of perceived value congruence. Using a person-centered analysis, Dr. Blais found that predictors of attrition included achievement, stimulation, universalism, benevolence, tradition, and conformity. The more likely participants were to endorse these values, the less likely they were to quit BMQ and were more likely to display greater affective commitment.

Dr. Blais concluded by highlighting that the CAF seems to be attracting recruits who perceive their values to be in line with the organization. In the early stages of recruit framing, low endorsement of the above noted social values is a red flag for attrition. Moving forward, Dr. Blais recommended the exploration of which values are crucial in light of future security environment. Additionally, Dr. Blais suggested that utilizing tactics such as clear expectations and positive support from experienced members could help promote values of the CAF and enhance values congruence. Ultimately, understanding prospective recruit’s goals and motivations allows the CAF to target their recruitment strategies and attract the most suitable candidate in light of the changing security environment.

**Dr. Anna Sackett**\(^{16}\) presented on leadership and critical skills development as skills needed to solve increasingly complex security issues. With the growing requirement to be agile and adaptive, Dr. Sackett suggested that maintaining readiness of the force can be attained by determining what army leaders do in their jobs that require them to use strategic thinking, competencies needed to solve the task, and how leaders were developed to become strategic thinkers. Dr. Sackett noted that strategic thinking is used at tactical and operational levels as well to solve strategic level problems. By considering the current leader development framework of the US and how army leaders are developed to be strategic thinkers, Dr. Sackett outlines four approaches used to develop leaders: personal growth, conceptual understanding, feedback, and skill building. However, Dr. Sackett noted that there may be development outside of professional military education (PME), during experiences that are not always given the credit they deserve because of army culture and barriers that may be present.

Proposed solutions to this challenge include talent management; the development of a shared lexicon; the development of strategic thinking skills earlier in the military career; the inclusion of a comprehensive leader development framework which includes understanding, skill building, feedback and personal growth through reflection; and the creation of a climate that promotes strategic thinking. Dr. Sackett recommended talent management development through the creation of incentives to promote strategic thinking can be attained by ensuring selection boards that value important strategic thinking and developmental experiences are available.

The panel continued with a presentation by **Colonel Jonathan Shaw**,\(^{17}\) who considered the integration of the soul in war and peace. Colonel Shaw noted that the functional and social imperatives of the soldier are always in tension and officers need to balance both. Colonel Shaw suggested that during war in the grey zone of conflict where soldiers must coerce or kill, we run

\(^{16}\) Research Psychologist, US Army Research Institute for Behavioural and Social Sciences  
\(^{17}\) Command Chaplain, US Army Europe
into the problem of the soldier’s soul. Colonel Shaw suggested that Just War provides the criteria for the state to rightly go to war, and the military to rightly prosecute, but does not address how a soldier justifies their actions to themselves or to God. Where the soldier and peacemaker find peace is what Colonel Shaw posits is a strategic requirement, because with peace both functional and social imperatives will be enforced. Colonel Shaw continued to discuss the connection between PTSD and moral injury, noting that moral injury is an event which violates deeply held moral values. The standard PTSD treatment, which targets trauma to the mind, currently bypasses moral and spiritual injury. As a result, moral injury treatment must be addressed, which Colonel Shaw suggests is problematic for military, whose resilience, fitness and medical concepts focus almost exclusively on the neurobiological. Colonel Shaw noted that this moral injury is often connected to anxiety of nonbeing, emptiness, and guilt often seen by veterans. Colonel Shaw called for a greater understanding of what it means to be human in the development of “human performance optimization,” and that the AOC can extend the idea of faith farther.

Colonel Shaw provided recommendations such as adjusting army ethic to include soldier’s foundational moral and spiritual values; adjusting doctrinal terms throughout the army lexicon to honor moral injury; providing chaplains at every location to strengthen the soul; and education on the benefits of religious practice. Policy recommendations influence the DOD’s official recognition of religious treatment by including spiritual and moral elements within medical treatment protocols to ensure holistic care.

Professor Stéfanie von Hlatky concluded the panel with her presentation on gender and cultural awareness in the CAF. Noting that culture and gender are identified as one of the key skills or competencies in hybrid conflict and grey zone warfare, Dr. von Hlatky probed the development of gender as a tool by both military and non-state actors. Highlighting at the outset that our assumptions of women as targets is being utilized by adversaries as they play into gender bias and underestimate the extent to which women participate in war, Dr. von Hlatky continued by highlighting key challenges with how norms are articulated and operationalized in efforts such as the UNSCR 1325 and the Bi-Strategic Command Directive 40-1. The creation of Gender Advisors are proposed to be a necessary first step, however the diffusion of knowledge is stunted to these gender experts. A second challenge is recognizing what actors are involved, where Dr. von Hlatky emphasizes the importance of incorporating women and their participation in the peace processes, while also noting the role of men and commanders as actors imperative to achieve success. Acknowledging the advantages of women in Western armed forces, Dr. von Hlatky highlights examples such as public diplomacy, comparative advantages of men and women, and that a diverse force performs better.

Key recommendations include the incorporation of gender analysis at each phase of conflict to address slow changing assumptions; self-reflection about personal biases and how these can be exploited by adversaries; practical tools to increase gender proficiency and highlight the operational necessity of a gender approach; and working towards a critical mass of 15% representation of women to benefit from the advantages highlighted.

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18 Director, Centre for International and Defence Policy, Queen’s University
Interviewer Nathan Freier\(^{19}\) sat down with Jill Sinclair\(^{20}\) and Loren DeJong Schulman\(^{21}\) to explore the grey zone between peace and war in an informal setting. The following considers the challenges that allied leaders face while operating and succeeding in this space by addressing three questions:

1) what is new, different, or confounding about security challenges that are now commonly referred to as “grey”?
2) how can we expect these challenges to manifest over time?
3) How should allied institutions adapt to grey zone competition and conflict in order to prevail over time?

Mr. Freier began the discussion by acknowledging the challenge for contemporary national security leaders and strategists to navigate through this new grey zone security environment that does not neatly conform to standard or conventional models. Once mapped, grey zone conflicts morph into new more complex strains. Competing definitions of the grey zone exist, however Mr. Freier posed the definition that the grey zone is resurging great power competition. Additionally, grey zone challenges are sinister, war-like actions determined to undermine competitors.

Jill Sinclair responded to the three posed questions at the outset with: 1) everything and nothing 2) in every way imaginable, and accept that in any way we expect, we will be wrong 3) brace yourself and get on with it. Adding to the posed definitions of the grey zone, Ms. Sinclair suggested the grey zone is a set of disruptive actions designed to generate opportunities which results in confusion and hesitancy for our own templates. Ms. Sinclair noted that challenges and challengers are fluid, agile, and resilient, and that we cannot always prevent these threats. What we can do to challenge this is dispersed but deliberate deterrence. This would require the utilization of all instruments of national power in a coherent way. Ms. Sinclair also suggested utilizing a broad concept of security, such as human security, which leads to earlier and preventive action.

Key recommendations proposed include removing the terms “prevail” or “succeed” from the dialogue, as this results in an oversimplification of the issue and is tempting for governments; assisting governments in preparing for ambiguous outcomes; and overcoming the “adaptation fetish” in the grey zone, as adaptation alone is insufficient. Rather, Ms. Sinclair suggests we must find the right combination of tools for the creation of small, effective solutions that may be non-military. We must consider the “how” rather than the “what,” in combination with a deliberate approach and interoperability. Ms. Sinclair concluded by proposing the utilization of C\(^2\)s: collaboration and compromise, challenge and context, critical and creative.

\(^{19}\) Associate Professor, National Security Studies, US Army War College
\(^{20}\) External Engagement & Partnerships, Canadian Defence Academy
\(^{21}\) Center for a New American Security
Loren DeJong Schulman discussed grey zone challenges from a perspective that focused on civilian/military dynamics that impact our ability to respond particularly at the senior decision-making level. From a US perspective, Ms. DeJong Schulman posited that ambiguity and a lack of mutual understanding of risk exasperates grey zone challenges and stressors. As a result, she proposed three “bad habits” from the US which results in a lack of comfort for both military and civilian decision makers and their distinct perceptions of risk, a lack of familiarity with grey zone challenges, and different perceptions of what an appropriate toolkit to deal with grey zone challenges would look like. Ms. DeJong Schulman suggested that micromanagement, provision of military advice, and a lack of understanding of civilian tools from the military perspective all retard response time and adaptability.

In an informal question and answer discussion, Mr. Freier probed about the asymmetry of risk perception within the US between civilian and military leadership. Ms. Sinclair noted there is indeed a challenge when comparing military training and education whereas civilian leaders generally do not have a reference point to determine whether military response is appropriate. Ms. DeJong Schulman recommended exercises not only at the military and operational level, but at a senior policy making level in order to address this asymmetry.

Mr. Freier then questioned whether it is possible to create a “playbook” for grey zone problems. Ms. Sinclair expressed her aversion to labels, and suggested rather the use of a wide inventory of tools that can be combined to generate a desired effect. Ms. DeJong Schulman suggested a comfort level with risk, along with the requirement for a shared vocabulary of how to discuss these risks. Ms. DeJong Schulman cautioned that at the senior decision making level, a playbook is not a viable suggestion.
Day II: June 15, 2016

Panel IV – Educating for the Unknown

Chaired by Professor William G. Braun, this panel considered institutional adaptation and how we can approach this new transition space of hybrid conflict by considering the institution’s way of instilling skill sets in soldiers. Professor Braun noted that although the soldier is the target audience for many of our discussions, adaptation from institutions are essential. As a result, this panel transitions from individual adaptation to institutional adaptation in the training and education domain.

The panel began with Major-General Eric Tremblay’s presentation on PME. Major-General Tremblay began by noting the operational environment of adversity and economic uncertainty, institutional challenges and resources challenges. He continued by emphasising the necessity for political balance within the domestic agenda and abroad that is required to sustain military supports and interests, and particularly cautioned against the hybrid trap. Major-General Tremblay noted that despite strengths at the tactical level, there are major gaps at the Development Period 2 (DP2) level in terms of critical thinking, as well as gaps in oversight of actors in Ottawa and strategic headquarters. Major-General Tremblay noted that these actors are competent and knowledgeable, but they have been put into environments that the CAF do not train officers for such as operating at strategic level and advising and supporting strategic leadership. Major-General Tremblay highlighted that this oversight in training comes at a great economic cost.

As a result, Major-General Tremblay proposes we must create a culture of institutional excellence, not just operational success. As a solution, Major-General Tremblay noted the Leadership Development Model, which moves beyond education and emphasises competencies in terms of aptitude knowledge, skills, attitudes, and training experience which will create institutional leaders.

Major General William Rapp began by outlining a number of trends that will affect the military in the coming decades, which include but are not limited to the diffusion of state control, demographics, big data, and nuclear proliferation. Major General Rapp cautioned that competition in the grey zone creates strategic paradoxes and daunting cognitive, political, and resource challenges. In discussing factors which confound strategy making, Major General Rapp noted that the military element of national power is rarely sufficient in itself, but that political objectives are consistently changing and attention is episodic, resulting in war as a series of small decisions. As a result, policy objectives are rarely fixed nor are the decisions timely. Major Rapp then questioned how we adapt our institutions to facilitate strategic objectives.

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22 Professor of Practice, Strategic Studies Institute, US Army War College
23 Commander, Canadian Defence Academy
24 Commandant, US Army War College
Solutions posed include the development of strategic skills such as curiosity, scepticism, and mental agility, while focusing on important (not just urgent) issues. Major General Rapp suggested that these traits and strategic-mindedness must exist by military and civilian leaders and those that advise them. As a result, the solution is one of talent management that allows for the development of adaptability and candor to assist political leaders. Four elements to this talent management include operations assignments, broadening assignments, PME, and disciplined self-study in the form of an individualized plan. Major General Rapp suggests that this development of critical thinking skills will avoid biases and traps that capture officers that only practice at military level. Acknowledging that the development of strategy making is difficult to “get right” in this new paradigm of the grey zone, Major General Rapp suggested that major challenges include the tensions between military planning processes not leading to lasting political outcomes sought by national decision makers, and the lack of insolvency of ends being attainable by available means.

Dr. Guillaume Lasconjarias concluded the panel by discussing the implications of technology on military training and PME. Beginning with a discussion drawing a distinction between what we have imagined the future would look like and what we’ve been faced with, Dr. Lasconjarias questioned how the military could adapt with new technology during a time of consistent surprise and within this new character of war. As a result, the military must be adaptive and leaders must be able to cope to this increasing complexity, which challenges the way the military currently trains and educates personnel. Dr. Lasconjarias suggested that PME must be seamless, continuous, and available on demand. However, challenges for the military include a lack of immunity to technological change inside PME, education is not safeguarded against resource availability, the need to identify educational tools, and how to educate without increasing costs. Dr. Lasconjarias noted that technology provides competitive advantage over our adversaries, but it must be used in a greater capacity such as education. In bridging the gap between the use of technology and the culture of learning, Dr. Lasconjarias justifies the use of technology by arguing that it is cost-effective, and allows us to educate every soldier at any time. Dr. Lasconjarias cautions that technology is not a panacea, but a tool that requires commitment to development and addressing hurdles such as “one size fits all” education, and the quality and relevancy of courseware. Dr. Lasconjarias concluded by noting that adaptation requires the understanding that technology has a role to play in how we train personnel, however increased technology does not necessarily equate to more effective learning.

25 Research Advisor, NATO Defense College
Panel V – Institutional Learning and Adaptation

Dr. Jeffrey Larsen26 chaired the fifth panel of the conference. This panel provided four case studies on organizational and institutional adaptation and learning.

Commencing with a presentation by Dr. Bastian Giegerich,27 the focus of this presentation was NATO and the EU as multinational foils. Dr. Giegerich clarified that these institutions are not a straightforward process of translating external pressure into new institutional policy or strategy, but best thought of as a multinational strategy and bargaining process filtered by domestic preferences. As a result, outcomes are often suboptimal; a theme Dr. Giegerich suggests we must become accustomed to. In acknowledging the need to understand the international environment, Dr. Giegerich stressed that resources must be invested to understand partners and allies due to the little knowledge of what individual nations are capable of. Particular challenges for institutions include recognizing the degraded security environment following a long cycle of defence cuts. In addition, issues of concurrency (the over-taxing of our systems due to wide spread instability), and alternative perceptions of threats challenge adaptation of institutions.

Dr. Giegerich noted that both NATO and the EU have developed action plans on the topic of defence and readiness. Dr. Giegerich suggested that NATO has been locked in a reactive pattern, and must relearn skills that have faded such as exercising at larger scales and across international spaces. Failure to do so is an institutional adaptation challenge. The EU, in comparison, is still searching for its role. However, Dr. Giegerich cautions that although adaptation is about defining roles, it runs the risk of being overwhelmed by complexity and falling into a loop of reflection without making progress. Dr. Giegerich concluded by acknowledging that the success of multinational efforts are only part of the puzzle; the challenge is to translate these into national actions as this is where capabilities lie.

Caroline Leprince28 questioned whether cultural differences had an impact on interagency collaboration. Ms. Leprince proposed her hypothesis that the greater the contradiction in organizational culture, the more challenges were apparent for collaboration. In applying organizational culture theory to Canadian agencies and departments, Ms. Leprince explained her methodology which would allow her to compare the cultures of 3D partners in Provincial Reconstruction Teams (PRTs), as well as the main criteria analyzed. These criteria included (but were not limited to) public documents, perception of failure, roles in the war zone, and styles of leadership and decision making. Ultimately, misunderstandings across these criteria led to tension in the field. Ms. Leprince continued by discussing the whole-of-government subgroups involved in PRTs, which included soldiers, uniformed services, and civilians. Her findings suggest that there were no affinities between the 3D partners, and that when contradictions were prevalent between organizational cultures, it was more difficult to collaborate. Despite success and collaboration for PRTs in Afghanistan, Ms. Leprince stressed that determination made this successful.

26 Director of Research Division, NATO Defence College
27 Director of Defence and Military Analysis, The International Institute for Strategic Studies
28 Policy Analyst, Raoul-Dandurand Chair of Strategic and Diplomatic Studies, Université du Québec à Montréal
Key recommendations include the selection of personnel in key leadership positions who will possess and support strong interpersonal skills for relationships with other whole of government partners. In addition, integrated planning principles that would outline goals, implementation strategies, roles and responsibilities are recommended. Finally, predeployment training prior to theatre is recommended.

**Friedrich Schröder** continued the panel with his presentation on the German experience of the interagency process in Afghanistan. Acknowledging that his findings mirror those of Caroline Leprince (see above), Mr. Schröder outlined the comprehensive and multiagency approach which was coordinated, coherent and sustained, as well as the numerous instruments utilized such as diplomatic, humanitarian aid, and military actors. Mr. Schröder outlined key processes taken, such as the transfer of PRTs to civilian leadership prior to transferring to Afghanistan partners, interagency cooperation through monthly/bimonthly meetings between senior officials and working level personnel, the post-ISAF development and emphasis on stabilization, and a progression from humanitarian aid to stabilization efforts.

In outlining lessons learned and the way forward, Mr. Schröder emphasized the institutional learning that occurred. Noting that interagency cooperation must be more than mere peaceful coexistence, he stressed a comprehensive approach while acknowledging that to overcome the grey zone, we need to use grey matter. Mr. Schröder suggested the importance of joint staff, joint databases, and potentially a joint budget. Future cooperation is suggested to follow the process of Clear, Hold, Stabilize, and Develop. Finally, Mr. Schröder noted that stabilization is here to stay, and that we must take lessons learned from Afghanistan and apply to emerging challenges. As a new strategic concept is created for NATO, Mr. Schröder suggested that stabilization will play a key role.

**Colonel Scott Kendrick** concluded the panel with his presentation on aspects of dispute, how they coincide with reality, and considerations regarding campaign design in the future. Colonel Kendrick suggested that aspirational uses of military such as phase zero, lockstep approach, and decisive winners result in the development of models that are symptoms of this view, and reflect how we would prefer conflict to unfold. This aspirational view insists on clarity of aim, centres on the elements of operational design, and suggest the desired outcomes naturally follow military victory. Noting in particular a 1978 study by Blackman and Caplan, Colonel Kendrick noted that the study’s context and analysis are worth considering for how military situations might adapt to current environment.

Colonel Kendrick proposed reservations about some elements of aspirational design and how to counteract this design with an alternative framework. Key challenges included the notion of a military end state, which can lead to flawed expectations. Colonel Kendrick suggested that first, we must recognize there are no formulas for certainty. An alternative campaign framework would 1) seek to contribute to the discussion, revise aims and have realistic assumptions, and 2) provide elements of operational design that are well-suited to craft solutions to defeat adversaries

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29 Civilian Reconstruction and Development for Afghanistan, Iran, and Pakistan, German Federal Foreign Office
30 Armor Officer, Army Capabilities and Integration Centre, US Army
war making capabilities. In pursuing outcomes as per the aspirational model, termination never really occurs. An alternative framework would include useful and relevant array of factors that connect with the strategic discussion. Colonel Kendrick suggests that an alternative framework should establish clear terms, create interagency-friendly definitions, and highlight best practices. Finally, Colonel Kendrick proposed that an alternative framework would account for alternative narratives that orient on outcomes, unmasking and delegitimizing the adversary. In conclusion, Colonel Kendrick recommended considering the past, as we have a rich history of competing in this grey space. Colonel Kendrick also noted that consolidating gains in conjunction with methodological transitions is essential.

Keynote Address

General Sir Richard Barrons\textsuperscript{31} presented his keynote address on the topic of the rapidly changing world and the profound implications of the information age. In suggesting that the legacy of the Post-Cold War period has been about peace and stability as well as freedom from existential fear of war, General Barrons questioned whether this is self-sustaining or guaranteed. Acknowledging the current framework of partial recovery while being locked into economies of perpetually slow growth (China), General Barrons proposed that Western supremacy has been declining, particularly for European members in NATO as well as Canada. In this period of persistent competition and conflict, General Barrons suggested military forces in the future acknowledge Canada has had an “easy ride.” In acknowledging we are currently at a strategic inflection point that requires different policy and resource choices, General Barrons alluded to numerous complex and concurrent challenges such as the risk of increased balkanization in Europe, the impact of falling oil prices, and increased migration. General Barrons suggested we cannot presume the future will be as stable nor can we be naïve to forecast what the terrain will look like.

General Barrons continued by considering these risks and challenges to Canada, in particular suggesting that our old models of planning, preparing, and training must be updated. Noting that war is unchanging and will continue to be ruthless, General Barrons acknowledged that the character of conflict is always changing, and proposed that conflict between advanced states in the future will be based on an attack on international infrastructure such as water, power, and cyber. As a result, we must consider changes in methods and acknowledging adversaries’ planning to attack these areas; however General Barrons cautions that we have not done so. We must re-evaluate our place in the changing world, acknowledge that many platforms cannot easily fight in the conditions of advanced A2AD we currently face. In proposing how the information age will change society, economics, and how we fight, General Barrons argued that we must align with the information age. In particular, General Barrons emphasized big data and how winners will be able to successful exploit this resource.

In considering the adaptation of the military, General Barrons provided concrete areas we must be on the front edge of in order to remain resilient and competitive. First, we must recognize and accept the peril we are in, and how changes in military and science have converged on our

\textsuperscript{31} Former Commander, Joint Forces Command, British Army
adversaries. Second, we must recognize the mobilization gap. Third, harnessing the intellectual power of Western militaries will be able to restore resilience. This can occur through intelligence and operating within closed secret intelligence systems such as the Five Eyes, in addition to utilizing social media and the internet. Fourth, utilizing combat estimates allows for a leaner, faster, more agile military. Fifth, we must move from a federative comprehensive approach to a better integration of national and international power. Sixth, full integration of offensive and defensive cyber capability, which will require different structures and processes in governments. To conclude, General Barrons suggested taking rigorous consideration of the changing geostrategic context and add this to the full implications of the intelligence age. General Barrons proposed we must shed the idea of a comfortable past in order to be the early, successful adaptors of the information age.

Panel VI - The Political Dimension

Dr. Kim Nossal32 chaired the final panel of the conference. Introducing the panelists, Dr. Nossal noted that over the course of the conference, policy implications and recommendations have been drawn by three individuals who have considerable experience and are well-placed to offer reflections, suggestions, and policy recommendations.

Dr. Paula Thornhill33 provided reflections and recommendations surrounding what she coined as Guardian Forces. Acknowledging the number of militaries mentioned, the variety of military individuals addressed, civilian roles, and international organizations, Dr. Thornhill questioned if all these actors are able to co-exist. Dr. Thornhill highlighted that we are less comfortable in the grey war arena than we’d like to admit. As a result, several defining parameters were outlined, which included how militaries are created to expand or defend geographic spaces, and that the actors and organizational cultures involved in this process have a proximity to violence. Dr. Thornhill suggested that the concepts of the military and defence have been eroded, especially if we accept the concept of the grey zone. Proposing we consider the issue of who is “in,” and who is “out” in the military, Dr. Thornhill argued that within the military, everyone is in, and nobody is out. This results in a policy dilemma for both civilian leadership and institutionally for the military: the military may be too eager to embrace any mission, as missions bring purpose and resources. In the US, this has resulted in an unhealthy feedback loop, where issues are more frequently utilizing the military as a proxy for government action. This militarization is juxtaposed to Canada and Europe, were Dr. Thornhill proposes we have removed violence from an organization that is traditionally asked to manage this violence on behalf of the state. These actors are what Dr. Thornhill referred to as the Guardian Forces; individuals who occupy the grey space between civilian and military policy execution, forces who are essential to defence of the nation but not tied to organized violence.

As a result of these already prevalent Guardian Forces, Dr. Thornhill challenged the group to consider whether the values of these Guardian Forces are who we are as a military, and if so, why? One important theme to the week was identifying and understanding we are creating a

32 Queen’s University
33 Director, AIR FORCE Strategy and Doctrine Program, RAND Corporation
new security force that is not military or civilian, but crucial to defence. Dr. Thornhill offered three recommendations, which included always questioning the myths we tell ourselves and why; cautioned us from backing into a Guardian Force construct; and for Canada to beware of demilitarizing our military.

Vice Admiral Kevin Green provided his recommendations in the form of a policy paper for new administration coming into office. Vice Admiral Green suggested the policy paper should begin with a description of the multilayered strategic environment. This description included the recommendation for new leaders to find a way to create shared understanding of needs, resources, and capabilities and shape appropriate processes against these competing domains. Vice Admiral Green then recommended focusing on civilian and military relationships, emphasizing the importance of responsibility through whole-of-government collaboration. This collaboration includes a close relationship with the private sector, as well as leader’s understanding their ability to manifest and leverage institutional cultures that have a stake in the defence of the nation. Vice Admiral Green then recommended that concepts of the grey zone and hybrid conflict will demand a robust reconsideration of resources, noting that this is not solely a military issue, but that new civilian leadership will need to lead, not just participate in. The tension between action and inaction in the grey zone was also a point of emphasis for this policy paper, where careful consideration of the consequences of action (or inaction) are essential.

Vice Admiral Green also emphasized the importance of how foresight, futures planning, and capabilities based planning must focus on how best to respond to the challenges we cannot see or appreciate at the present time. Vice Admiral Green suggested ensuring budgeting is directed by strategy and informed by resource constrains, where danger is, and opportunities. It was also suggested that new administration must account for the characteristics of military personnel and institutions for which they are responsible. Vice Admiral Green noted that critical skills including agility and adaptive thinking are essential to success. Finally, the policy paper would recommend approaching the private sector to learn skills regarding urgency and the need to measure success and benefits.

The panel concluded with a presentation by Lieutenant-General (R) Stuart Beare. Lieutenant-General Beare structured his presentation by first considering that the proceedings from the conference were aligned with “how-tos;” how to think about the job to be done, how to act before doing the business of operations (pre-crisis), and how to behave in operations in the grey zone that allows us to stay resilient and adapt. Lieutenant-General Beare considered what the CAF is doing to anticipate and prepare for emerging challenges. As trends are all increasing in terms of volatility, instability, and uncertainty, Lieutenant-General Beare suggested that investing in understanding, partnering and preparedness is essential for those not deployed, particularly in the grey zone. Upon outlining the five phases of the Canadian military doctrine, Lieutenant-General Beare highlighted that there is no doctrine for what precedes the first phase of the doctrine. This is where understanding, partnering, and preparing pre-warning are essential. In particular, Lieutenant-General Beare suggested that preparedness is the sum of all monitoring

34 Consultant Practice Leader, Robertson Blodgett Consulting
35 Tri-Leaf Insights Inc.
and understanding, partnering, and planning. This planning phase should be completed in a prescriptive way, which builds relationships.

Lieutenant-General Beare stressed that partnerships need to exist pre-crisis, with a mutual understanding and reciprocal acceptance of the structure and rules of partnership. When considering agility and the ability to adapt, a clear desire to enter into theater, with clear strategic goals set by politicians and operation goals set by strategic leaders is required. In addition, the monitoring of all operational campaigns in the pursuit of shared goals is essential. Lieutenant-General Bear concluded by questioning whether the CAF as a profession recognizes the capacity and structure required to complete these functions. In response, he acknowledged that the CAF are not yet solidified as a profession in understanding the lens through which agility is realized for operations pre-crisis and the conduct of missions itself. As a result, Lieutenant-General Beare recommended and challenged the CAF to adapt to this type of thinking. Ultimately, in order to be prepared to execute military objectives full, partners are essential especially in the grey zone.

Closing Remarks

Professor Douglas Lovelace\textsuperscript{36} provided the closing remarks from this year’s conference. Professor Lovelace began by acknowledging that general warfare has returned. Noting that grey zone operations are nothing new, Professor Lovelace juxtaposed this position by drawing attention to the new actors operating in the grey zone. Highlighting the importance of reconciling political and military objectives, he suggested that the ability to give military advice effectively is required but will challenge the ability to remain a-political. In particular, Professor Lovelace likened the success of military forces to the game of Go. In this game, there are no winners or losers, but rather the emphasis is on gaining and maintaining strategic advantage to subordinate your adversary. As a result, Professor Lovelace recommended that in military operations, we must consider whether our strategic position is improved by our most recent operation. Professor Lovelace also suggested that law enforcement agencies could benefit from stronger deliberative planning and crisis action planning, however questioned their ability to implement this recommendation.

Professor Lovelace also stressed how ideological adaptation must be integrated to address grey zone challenges, and acknowledged that the ideal time to create this change and promote strategic thinking is within the current information age. Regarding civil/military relations when providing military advice, military leaders must take into account what is politically astute but also feasible from an armed forces and society perspective. Professor Lovelace also questioned the notion of an overly militarized society and proposed an alternative perspective. Acknowledging that the military is now a first resort as a topic alluded to in the conference, Professor Lovelace proposed the reasons as to why this may be the case, namely; the armed forces can be timely in a way departments cannot, and the deployment of armed forces by presidential decision without the consideration of congress.

\textsuperscript{36} Director, Strategic Studies Institute, US Army War College