

Safe: Outline Plans for specific
operations: Book IV

OUTLINE PLANS FOR
SPECIFIC OPERATIONS

BOOK IV

THE PRESIDENT
OF THE UNITED STATES

I N D E X

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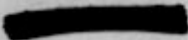
By RHP, NLR, Date FEB 19 1974

SUMATRA

 - SECURITY

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378-1
(J.C.S. 306)

15 May 1943

Pages 1 - 13 incl.

JOINT CHIEFS OF STAFF

OPERATIONS IN SUMATRA

Note by the Secretaries

The attached plan was prepared by the Joint War Plans Committee and is circulated for the consideration of the Joint Chiefs of Staff.

J. R. DEANE,
F. B. ROYAL,
Joint Secretariat.

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JCS memo, 1-4-74
By RHP, NLR, Date

FEB 19 1974

OPERATIONS IN SUMATRA

Report by Joint War Plans Committee

1. A study to determine the merits and possibilities of operations against all or part of SUMATRA is contained in Enclosure "A".

2. In view of physical limitations and enemy capabilities, it was concluded that the seizure and occupation of north SUMATRA offers the greatest chance of success.

3. Concept of the operation (See chart, Appendix "A" to Enclosure "A").

a. A landing on the north coast of SUMATRA in the vicinity of LHKSEUMAWE by amphibious forces under cover of carrier-based aircraft, for the purpose of establishing beachheads and securing the airfield in the vicinity. Simultaneously, a landing on WE Island (SEBANG) for the purpose of securing the harbor and airfield.

b. An extension of the bridgehead followed by an advance to the south to seize and hold the line NATAL - KOTAPINANG BAROE - LABOEHANBILIK.

4. Major forces required.

a. Ground.

3 Infantry Brigades, 2 Infantry Divisions, 2 Tank Regiments.

b. Air.

4 Fighter Groups, 5 Bomber Groups, 1 Observation Group, 1 Transport Group.

c. Naval.

4 BB, 9 CV, 4 CA, 8 CL, 75 DD.

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5. Pertinent factors.

The inherent weakness of this operation lies in the ability of the enemy to concentrate land-based aircraft against our amphibious task forces, and our own inability to provide any land-based air coverage therefor. Thus, during the assault and until landing fields can be made useable, air protection for our forces must be provided by carrier-based aircraft.

6. Strategic significance.

a. The capture of north SUMATRA would interfere with Japanese shipping in the STRAIT OF MALACCA. Air operations may be conducted against PALEMBANG oil refineries and other strategic targets (See Appendix "A").

b. The recapture of north SUMATRA is an essential part of operations to reopen the STRAIT OF MALACCA. The latter is a vital part of the strategic plan for the defeat of JAPAN. The opening of the Strait, however, comes in a phase subsequent to the recapture of BURMA and the opening of the BURMA ROAD. It is, therefore, not a substitute for ANAKIM.

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ENCLOSURE "A"

OPERATIONS IN SUMATRA

1. Problem.

To determine the merits and possibilities of operations against all or part of SUMATRA.

2. General.

a. SUMATRA is one of the bastions in the outer ring of JAPAN'S defenses. Its occupation, together with MALAYA, insures the control of the STRAIT OF MALACCA and protection to her shipping lanes from the Malay barrier to the SOUTH CHINA SEA. The island is an important source of petroleum and rubber for the support of JAPAN'S war economy. In 1940 SUMATRA produced 39,800,000 barrels of petroleum and 400,000 tons of rubber. Of this amount 7,500,000 barrels of petroleum and 200,000 tons of rubber were produced in northern SUMATRA.

b. A study of the physical characteristics of the island and the enemy capabilities in the area indicates that the northern part of the island is the most favorable for initial landings and occupation.

c. The poor communications between north and central SUMATRA makes the enemy reenforcement of ground defenses difficult.

d. The northern tip of SUMATRA lies some 300 miles west of the MALAY PENINSULA, thereby reducing to some extent the effectiveness of enemy air power against landings along the northern coast.

e. The capture of north SUMATRA would eventually be followed by the seizure of MALAYA and the capture of SINGAPORE to reopen the STRAIT OF MALACCA. Such an operation is in accordance with the strategic concept for the defeat of JAPAN.

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3. Geographical estimate.

a. SUMATRA

The island is about 1,000 miles long by 250 miles wide. A backbone of mountains extends down the west coast from end to end. The eastern lowlands, 100 to 200 miles wide, are primarily swampy.

The island is divided into three distinct sections by weather, native types, and communications -- the northern part extending south to NATAL, the central part from NATAL to below DJAMBI, and the southern part from below DJAMBI to SUNDA STRAIT.

SUMATRA has predominantly rugged or swampy terrain. The west coast mountain spine places all important communications on the east coast. A communications bottleneck effectively separates northern from central and southern SUMATRA.

b. North SUMATRA.

North SUMATRA is roughly 400 miles long and 125 miles wide. MEDAN, population 75,000, is the only city of consequence. The distance across the STRAIT OF MALACCA from north SUMATRA to the MALAY PENINSULA varies from 80 to 200 miles. The limited plains between the swamps along the coast and the forest covered mountain chain are the only areas suitable for cross-country operation of motor transport. Elsewhere traffic is limited to roads or navigable streams. Motor transport is not possible off the prepared roadbeds which follow the natural levees of the river. The climate is wet and tropical. Weather is most favorable in February and March. Malaria is prevalent.

c. Beaches.

Accurate information on beaches is not available. The best beach in the area is reported to be on the north coast at LHOKSEUMAWA, where 20 miles of hard surfaced beach is backed by roads and a railroad, and fronted by a good anchorage in a protected bay. In addition, there is reported

[REDACTED]

to be a suitable stretch of about 40 miles west of the LHKSEUMAWA area. No landing beaches with suitable exits to the interior exist along the east coast.

d. Sea approaches.

The hydrography of the area along the north coast will not present undue difficulties to landing operations. The west coast has numerous reefs and shoals; the east coast, in general, has too gradual a slope to permit the near approach of large vessels.

4. Mission.

To seize and hold north SUMATRA.

5. Concept of operations (See Appendix "B")

a. To assault beaches along the north coast of SUMATRA in the vicinity of LHKSEUMAWA with amphibious forces under cover of carrier-based aircraft, for the purpose of establishing beachheads and securing the airfield nearby. Simultaneously, to assault WE Island in order to secure the harbor and airfield thereon.

b. Assault phase.

(1) Two brigades land simultaneously on beach areas west of LHKSEUMAWA.

(a) One brigade (A)* captures the nearby airport and establishes a bridgehead through which the light infantry division (D)* can pass.

(b) The second brigade (B)* moves west on the KOETARADJA road to contain any Japanese forces in that area.

(2) A third brigade, (C)* assaults the beach area on WE Island to capture the harbor of SABANG and the airfield nearby.

*See Chart, Appendix "B".

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(3) A combat-loaded light infantry division (D)* forming the floating reserve, lands at the bridgehead secured by the first brigade; proceeds as rapidly as possible to MEDAN to capture the city, its airdrome, and the nearby port of BELAWAN.

c. Follow-up phase.

(1) A light infantry division (E)* convoy-loaded, lands at BELAWAN, if the port is available, otherwise on the north of WE Island in the vicinity of SEBANG. After debarkation it proceeds to MEDAN to reinforce the first light infantry division (D)*.

(2) Brigade (B)* captures KOETARADJA and the nearby airfield and clears Japanese resistance on the northern and northeastern coasts, thus releasing Brigade (A)* to act as a general reserve for further offensive operations in the south.

(3) Light infantry division (D)* reinforced by light infantry division (E)* advances south and southeast to establish and defend the line NATAL - KOTAPINANG BAROE - LABOEHANBILIK.

6. Military estimate - enemy forces.

a. Ground.

It is estimated that one infantry division plus supporting troops (a total of 20,000 men) is in SUMATRA. One regimental combat team garrisons the northern section and is probably centered at MEDAN, with detachments in the vicinity of SABANG, (WE Island -KOETARADJA).

*See Chart, Appendix "B".

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b. Air.

It is estimated that JAPAN has the following aircraft in the area, MALAYA - SUMATRA - JAVA - ANDAMANS:

36 Fighters
57 Bombers
24 Observation
26 Float fighters

Total 143

c. Naval.

It is estimated that JAPAN has the following vessels based on MALAYA and JAVA:

<u>CL</u>	<u>ACV</u>	<u>SS</u>	<u>DD</u>
4	1	2	2

d. General.

No enemy combat forces are believed to be present in the NICOBARS or on the islands off the west coast of SUMATRA. No naval or air forces are believed to be in the ANDAMAN ISLANDS.

7. Capability of reinforcement.

a. Ground.

Reinforcements could be transported rapidly from SINGAPORE, JAVA, or by small native boats, from the MALAY PENINSULA. There is now one division (plus) in MALAYA and two in JAVA. In one month, JAPAN could reinforce SUMATRA with troops from INDO-CHINA, CHINA, or THAILAND.

Due to the capacity of port installations and the nature of the terrain, it is estimated that not more than five divisions could be profitably utilized on the island of SUMATRA.

Within 10 days the forces in north SUMATRA could be reinforced by one division from JAVA and one brigade from INDO-CHINA. Immediate reinforcement overland from central

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and southern SUMATRA is possible, but unlikely because of the requirements of local security and the great distances involved.

b. Air.

It is estimated that JAPAN can reinforce the area with aircraft as follows:

In 10 days -- 291 aircraft, making the total in the area 434.

In 14 days -- 168 aircraft making the total in the area 602.

A strength of at least 400 could be maintained indefinitely in this area provided JAPAN is not faced with a major demand in other areas.

c. Naval.

Small Japanese naval forces are available in adjacent areas for reinforcement. Since naval operations in the PACIFIC may be expected to force JAPAN to retain her major naval units there, her most likely action would be to send a task force into the INDIAN OCEAN.

8. Estimate of forces required.

(Since SUMATRA is in an area of British strategic responsibility the operation should be accomplished by British Commonwealth forces. The plan envisages mounting the operation from CEYLON and INDIA).

a. Ground.

(1) Assault forces:

One Infantry Division (Equivalent of 3 Brigades)	17,000
One Light Infantry Division	10,000
Two Armed Regiments	1,000

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(2) Follow-up force:

One Light Infantry Division 10,000

(3) Supporting troops:

Estimated at approximately 30% of strength
of other combat units 11,000
49,000

b. Air.

The following, or equivalents in British squadrons, are the air forces necessary to be allocated for the entire operation:

	<u>Personnel</u>
4 Fighter Groups	4,892
1 Light Bomber Group	1,247
2 Medium Bomber Groups	3,112
2 Heavy Bomber Groups	3,338
1 Observation Group	882
1 Transport Carrier Group	1,452
Supporting units	<u>7,283</u>
Total air personnel	22,216
Total aircraft	700

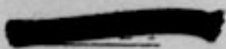
c. Naval.

	<u>Covering force</u>	<u>Escort and assault</u>
BB	4	
CV	3	6
CA	4	
CL		8
DD	27	48
Plus minesweepers, etc.		

9. Critical factors affecting success of operation.

a. Air.

JAPAN now has 11 landing fields and 5 airdromes within 350 miles of the initial area of operations. There are 3


landing fields and no airdromes within the area selected for the initial assault. The condition and capacity of the landing fields is unknown. It must be assumed that JAPAN has adequate facilities for operating all aircraft that she can make available in this area.

JAPAN'S capabilities to reinforce with aircraft will vary to a great extent, depending on the state of her air force and the state of activity in other areas.

Carriers must remain in the area until landing fields ashore have been seized and placed in operation. In the absence of more definite information, it is logical to assume that the three landing fields in the area, even though seized intact, would not accommodate a large number of airplanes. One fighter squadron and one bomber squadron each should be considered a reasonable estimate. This situation will require that some aircraft carriers remain in the area until landing fields can be built or enlarged. This would require 2 weeks to 2 months depending on the terrain and construction equipment available.

b. Naval.

Since no support from shore based aircraft will be available until airfields can be secured and made useable, the requirements for carrier based aircraft will be heavy. The use of ACV's in an assault operation is undesirable, but in view of the shortage of carriers some may have to be employed.

Due to losses during aerial reconnaissance and other operations prior to the actual landing, a superiority of three to one must be provided in order to insure a superiority of two to one at the beachhead.

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Due to lack of port facilities during the assault phase, the supply of the operations during this period should be facilitated by the provision of small coastal vessels and sea-going landing craft. Small vessels will also be required to supply the forces as they advance southward from the initial landing areas.

10. Advantages and disadvantages.

a. Advantages.

The establishment of UNITED NATIONS forces on the Island of SUMATRA would have the following advantages:

(1) Opens another front for the employment of UNITED NATIONS forces against JAPAN.

(2) Provides bases for air and submarines to operate against Japanese forces using the STRAIT OF MALACCA.

(3) Forces JAPAN to further disperse her ground, sea, and air forces and bring them within range of our attack.

(4) Furnishes a fertile field for attrition against Japanese air and naval forces, and shipping.

(5) Facilitates further UNITED NATIONS operations down the MALAY PENINSULA to SINGAPORE.

(6) Provides an air transport stop permitting the establishment of an air route between AUSTRALIA and INDIA. It would complete the last link in our air transport and ferry route around the world.

(7) Would deny to JAPAN and make available to the UNITED NATIONS appreciable amounts of rubber and oil.

b. Disadvantages.

(1) The operation cannot be supported initially by land-based aviation and is therefore likely to be very costly in shipping.

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(2) These operations may require the eventual occupation of the entire island and the MALAY PENINSULA. They may involve unusually heavy garrisoning of the occupied areas to insure maintaining our position, with consequent increased demands on shipping.

(3) The maintenance of the sea line of communications would require increased demands for escort vessels.

(4) As long as the enemy occupies the MALAY PENINSULA, its land based aircraft exposes UNITED NATIONS convoys to air attack.

11. Seizure of northern SUMATRA versus ANAKIM.

a. Our strategic concept for the defeat of JAPAN requires opening a supply route to CHINA and is based on keeping CHINA in the war. This supply route must be opened as quickly as possible, and an operation to open the Burma Road is the only operation which will accomplish this in any reasonable time. The accomplishment of ANAKIM is urgent.

b. Although a campaign to open the STRAIT OF MALACCA is also an essential part of our strategic plan, the opening of this Strait is not urgent. Furthermore, the capture of north SUMATRA is not the first step in opening the STRAIT OF MALACCA. The first step is the reconquest of BURMA.

c. UNITED NATIONS forces in the FAR EAST are not sufficient to mount ANAKIM and recapture north SUMATRA simultaneously. Furthermore, the urgency of ANAKIM will not permit its delay until the fall of 1944. This would be the earliest date that it could be mounted, if the north SUMATRA operation is initiated first. The recapture of north SUMATRA has many strategic advantages, but under the present concept for the defeat of JAPAN, it is not a matter of urgency. Its advantages may be reaped after the conquest of BURMA.

12. Conclusions.

a. The results that may be expected from the seizure of north SUMATRA when compared to those which may be obtained by a successful ANAKIM makes the north SUMATRA operation unacceptable as a substitute for ANAKIM.

b. Considering the relation of the north SUMATRA operation to other operations to open the STRAIT OF MALACCA the sequence should be

(1) Reconquest of BURMA

(2) Advance down MALAY PENINSULA to capture SINGAPORE with forces based in southern BURMA.

(3) Recapture of northern SUMATRA closely coordinated with (2) above.

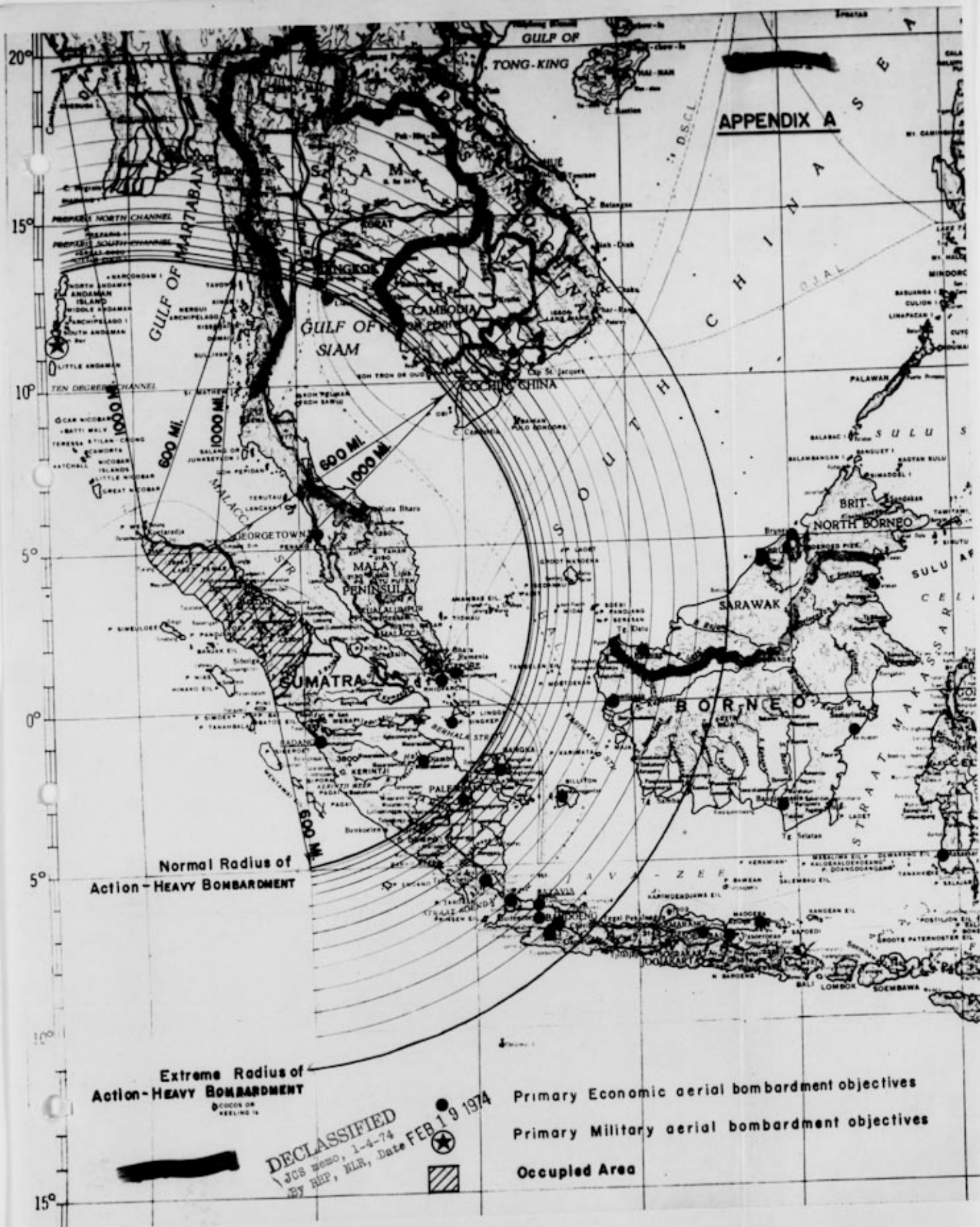
c. The inherent weakness of this operation lies in the ability of the enemy to concentrate land based aircraft against our forces during the assault. It is therefore essential that the operation be coordinated with naval and air offensive operations in the PACIFIC and ASIATIC theatres which would prevent the transfer of enemy air forces to the SUMATRA area.

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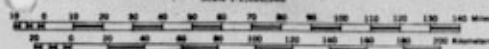
APPENDIX B

CONCEPT OF OPERATIONS and INSTALLATIONS

SUMATRA (NORTH)

SPECIAL STRATEGIC MAP

Scale 1:2,000,000



Mercator Projection

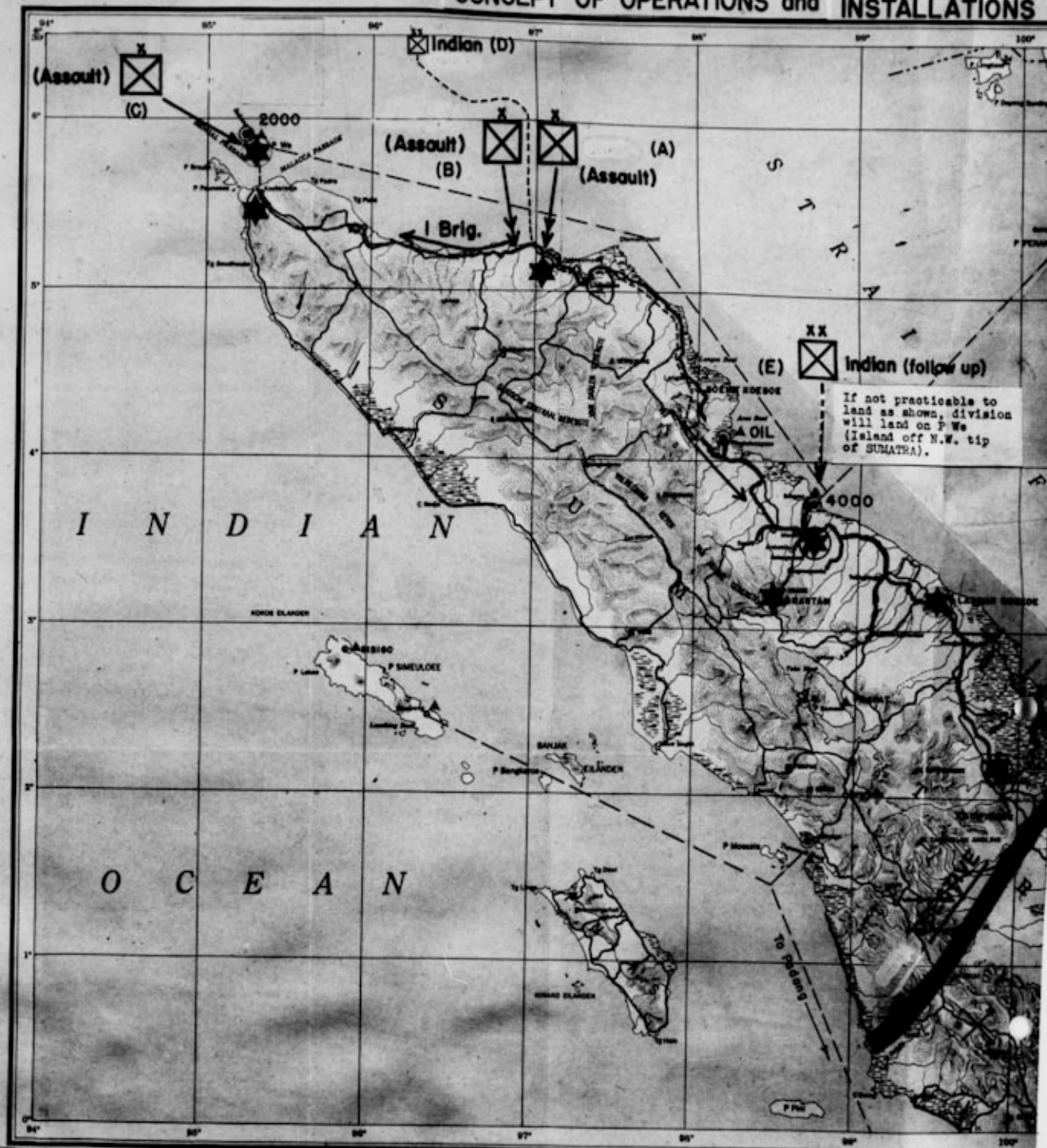
True Scale at 0° North

HEIGHTS IN METERS

LEGEND

- Towns of first importance: Roads: 1st class: Roads: 2nd class: Third: Fourth: Railroads: Narrow Gauge (NG): Operational boundaries:

- Road Bottleneck
 Airfield
 Airdrome
 Seaplane Anchorage
 Submarine Cable
 Port and Port Capacity (DWT/Day)



DODECANESE

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(LIMITED DISTRIBUTION)

14 May 1943

JOINT CHIEFS OF STAFF

OPERATIONS SUBSEQUENT TO THE
SEIZURE OF THE DODECANESE

Note by the Secretaries

The attached plan, prepared by the Joint War Plans Committee, is presented to the Joint Chiefs of Staff for consideration.

J. R. DEANE,

F. B. ROYAL,

Joint Secretariat

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BRIEF
OF
OPERATIONS SUBSEQUENT TO THE SEIZURE OF THE DODECANESE

Report by Joint War Plans Committee

1. A study of the merits and possibilities of operations against other AEGEAN ISLANDS subsequent to the seizure and occupation of the DODECANESE, in order to open a sea route to SMYRNA and to improve the UNITED NATIONS position in the AEGEAN, is contained in Enclosure "A."

2. Operation to open a sea route to SMYRNA. (See Chart, Appendix "A" to Enclosure "A")

a. Concept.

An amphibious assault, against IKARIA, KHIOS, and MYTILENE, launched from bases in the eastern MEDITERRANEAN.

Phase I. The gaining and maintaining of air superiority northward from the DODECANESE over IKARIA and KHIOS.

Phase II. Amphibious and airborne landing operations to seize and occupy IKARIA and KHIOS.

Phase III. The gaining and maintaining of air superiority over MYTILENE.

Phase IV. Amphibious and airborne operations to seize and occupy MYTILENE.

b. UNITED NATIONS forces required.

(1) Air. 1559 aircraft.

798 bombers, 525 fighters, 208 troop carriers, 28 miscellaneous aircraft.

(2) Ground.

1 infantry division, 1 regimental combat team, 1 parachute regiment, 1 parachute battalion.

(3) Naval.

Covering force (IONIAN SEA): 4BB, 2CV, 8 CA and CL, 20 DD.

Assault force: 2 HQS, 18 DD, 24 PC, 20 APA, 7AKA,
smaller craft as required.

3. Operation to improve the UNITED NATIONS position in the
AEGEAN. (See Chart, Appendix "B" to Enclosure "A")

a. Concept.

An amphibious and airborne operation launched from bases
in the DODECANESE to seize and occupy the islands of NAXOS,
PAROS, and MELOS.

Phase I. The gaining and maintaining of air superiority
over NAXOS and PAROS.

Phase II. Amphibious and airborne landing operations
to seize and occupy the islands of NAXOS and PAROS.

Phase III. The occupation of MELOS.

b. UNITED NATIONS forces required.

(1) Air.

1559 aircraft, as for the operations to open a sea
route to SMYRNA. (Paragraph 1).

(2) Ground.

2 regimental combat teams, 1 parachute battalion.

(3) Naval.

Covering force (IONIAN SEA): 4 BB, 2 CV, 8 CA and
CL, 20 DD.

Assault force: 18 DD, 24 PC and SC, landing craft
and smaller craft as required.

4. Conclusions.

a. One of the main objects of operations in the AEGEAN would
be to persuade TURKEY to enter the war as an active ally. If
this has not been accomplished by the capture of the DODECANESE,
it is unlikely that further operations against the AEGEAN
islands will cause TURKEY to abandon her neutral position.

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b. As it will be logistically most difficult to make the decisive reentry into the continent through the BALKANS, operations in the AEGEAN can only be regarded as secondary. Therefore, any operations that are undertaken in this theater must be judged primarily in the light of their value as diversions.

c. In order to open the sea route to SMYRNA it will be necessary to seize and occupy the islands of IKARIA, KHIOS, and MYTILENE. Once TURKEY has entered the war on the side of the UNITED NATIONS, the use of this sea route will be essential.

d. The most acceptable operation to improve the UNITED NATIONS position in the AEGEAN is to seize and occupy the islands of NAXOS, PAROS, and MELOS. The advantages to be gained, however, are not commensurate with the cost unless further operations in this area are envisaged.

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ENCLOSURE "A"

OPERATIONS SUBSEQUENT TO THE SEIZURE OF THE DODECANESE

1. Assumptions.

- a. HUSKY was successfully completed by mid-August, 1943.
- b. ITALY has not collapsed.
- c. The bomber offensive against AXIS installations on the continent is increasing in intensity and will seriously reduce the AXIS war potential.
- d. GERMANY's operations against RUSSIA in 1943 will not be decisive, and RUSSIA will remain an important factor in the war.
- e. An invasion of the BRITISH ISLES or of TURKEY is not considered an AXIS capability. An AXIS invasion of the IBERIAN PENINSULA is improbable. SPAIN, PORTUGAL, and TURKEY remain neutral.
- f. The Battle of the ATLANTIC remains serious in its shipping implications.
- g. UNITED NATIONS commitments in the PACIFIC and Asiatic areas and to RUSSIA remain substantially as now planned.
- h. The DODECANESE islands and the Greek island of SAMOS are in the hands of the UNITED NATIONS forces.

2. General discussion.

a. Terrain estimate.

(1) The islands in the AEGEAN are mainly the tops of mountains projecting above the surface of the sea. MELOS, PAROS, NAXOS, ANDROS, LEMNOS, MYTILENE, KHIOS, and IKARIA are among the few known to contain areas suitable for the construction of fighter strips or airdromes.

(2) It is known that the enemy has airdromes on MYTILENE and LEMNOS. Fighter strips and emergency landing fields have been put in on almost all of the larger islands throughout the AEGEAN. There are in

addition several large seaplane bases. These islands are generally of limestone formation so that the ground dries rapidly after even a heavy shower, and fighter strips are usable within a short time.

(3) Landing beaches on the islands throughout the AEGEAN are generally limited in extent making it difficult to mount a large assault against the majority of the islands. It becomes advisable therefore that combined amphibious and airborne assaults be made upon whatever islands it is intended to seize.

(4) The climate is Mediterranean and is characterized by mild, intermittently rainy winters and hot, dry summers. During the winter there may be occasional winds of sufficient strength to create heavy seas; these winds are generally from the north.

b. Enemy capabilities.

(1) Air.

It was estimated that the AXIS could, by reductions in other areas, reinforce the 333 planes in the area by 1300 of all types to oppose UNITED NATIONS operations in the DODECANESE. If operations are conducted in the AEGEAN by the UNITED NATIONS subsequent to the seizure of the DODECANESE, it is assumed that the AXIS can maintain this air strength by replacement of losses.

The known and possible airdromes in GREECE, CRETE, and the AEGEAN islands will support any force the AXIS can deploy. The size of the force that will actually be employed will depend upon the importance the AXIS attaches to this area.

(2) Ground.

The Germans are reported to have one reserve infantry division and miscellaneous non-divisional

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units in the PELOPONNESUS and the Greek Islands. There are reported to be about 3500 Germans on MYTILENE, 800 on LEMNOS, and 500 on KHIOS. These units are principally anti-aircraft and internal security troops. The Germans have on CRETE from 20,000 to 50,000 men. The Italians have 40,000 men in the Greek Islands, including CRETE, and eight infantry divisions on the Greek mainland. As of this date (12 May 1943) the Italian garrisons in the AEGEAN islands are estimated as follows:

300 men	THERA
800	NAXOS
800	PAROS
3,000	SYROS
600	ANDROS

It is probable that some of these smaller garrisons will be concentrated in the larger AEGEAN islands, CRETE, and the PELOPONNESUS upon the fall of the DODECANESE.

Although the AXIS would probably defend CRETE strongly, a stubborn defense is not expected throughout the rest of the islands. At the present time it is considered improbable that the AXIS will substantially reinforce the ground forces in the area.

(3) Naval.

It can be expected that miscellaneous local defense craft and submarines will be encountered.

c. Political and economic factors.

The Greek Islands are under Military rule. An invading force can expect aid from the population.

The islands are barely able to sustain their normal population. Any UNITED NATIONS invading force must be prepared to carry all of its supplies with it.

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On the larger islands there are ordinarily sufficient springs and wells to furnish the necessary water. Water on the smaller islands is extremely scarce during the summer drought.

3. a. Air - general.

The proximity of islands with existing airdromes or terrain suitable for the construction of fighter strips makes the maintenance of fighter cover by the UNITED NATIONS throughout the operation a fairly easy task. This is true in an advance either north or west from our present position in the DODECANESE.

b. Naval - general.

With air bases on IKARIA, KHIOS, and MYTILENE the Port of SMYRNA will be open to UNITED NATIONS shipping. This shipping should be routed from the east to the northward of RHODES, and eastward of KOS, SAMOS, KHIOS, and thence through the GULF OF SMYRNA.

With the above localities in the hands of the UNITED NATIONS it would be feasible to operate destroyers and smaller naval craft within range of shore-based aircraft in daylight and would be further possible to make sweeps through the AEGEAN SEA during the hours of darkness.

4. Discussion of operations to open a sea route to SMYRNA.

a. Examination of possible operations.

(1) A sea route to SMYRNA may be opened by a further advance northward to occupy the islands of IKARIA, KHIOS, and MYTILENE. With these islands in UNITED NATIONS hands it will be possible to furnish adequate air and naval protection to convoys proceeding into SMYRNA.

(2) While a further advance to LEMNOS would make

the route more secure, the cost of such an operation would not be commensurate with the results to be obtained, particularly since the airdromes on the island could be neutralized by UNITED NATIONS bombing operations.

b. Concept of the operation. (See Chart, Appendix "A")

An amphibious assault against IKARIA, KHIOS and MYTILENE launched from bases in the eastern MEDITERRANEAN.

Phase I. The gaining and maintaining of air superiority northward from the DODECANESE over IKARIA and KHIOS.

Phase II. Amphibious and airborne landing operations to seize and occupy IKARIA and KHIOS.

Phase III. The gaining and maintaining of air superiority over MYTILENE.

Phase IV. Amphibious and airborne operations to seize and occupy MYTILENE.

c. Forces required.

(1) Air.

Bombers (Medium)	10 groups	570 a/c
Bombers (L/D)	4 "	228 a/c
Fighters	7 "	525 a/c
Troop Carriers	4 "	208 a/c
Photo Reconnaissance		4 a/c
Observation	1 squadron	24 a/c

Note: (a) It is assumed that 75% of the above aircraft will be operational.

(b) The aircraft employed in the static defense of the DODECANESE are not included in these figures.

(2) Ground.

(a) To seize and occupy IKARIA and KHIOS, it is estimated that the following forces will be required:

One Regimental Combat Team
(amphibiously trained)

One Parachute Battalion

(b) To seize and occupy MYTILENE, it is estimated that the following forces will be required:

One Infantry Division (amphibiously trained)

One Parachute Regiment

(3) Naval.

(a) Covering force (IONIAN SEA)

4 Battleships

2 Aircraft Carriers

8 Cruisers

20 Destroyers

(b) Assault force.

20 APA's

7 AKA's

2 Headquarters Ships

18 Destroyers

24 PC's

Minesweepers, tugs, and miscellaneous craft as required.

d. Advantages.

(1) Has a beneficial moral effect on TURKEY.

(2) Acquires further air bases for strategic bombing operations into the BALKANS.

(3) Encourages subversive activities in the BALKANS.

(4) Contains present German air forces in the BALKANS and might cause a limited additional diversion of units from the Russian Front.

(5) Interdicts the AXIS lines of communication through the AEGEAN.

(6) Opens the Port of SMYRNA to UNITED NATIONS shipping.

e. Disadvantages.

(1) Is a difficult amphibious operation moving directly into strong AXIS air defensive installations.

(2) Is not suitable as a route of advance into the BALKANS because additional amphibious operations in the face of strong AXIS opposition are a necessary prelude thereto.

(3) Does not contribute materially to the collapse of ITALY.

(4) Will not seriously dislocate German strategic plans nor provide any substantial diversion of strength from the Russian Front.

(5) Is an unjustified diversion of UNITED NATIONS resources if no decisive operations are envisaged in this area.

(6) Imposes a greater strain on UNITED NATIONS shipping to maintain the position than that imposed by any other operation on the continent.

5. Discussion of operations to improve the UNITED NATIONS position in the AEGEAN.

a. Examination of possible operations.

(1) The UNITED NATIONS position in the AEGEAN SEA can be improved by advancing westward from the DODECANESE to the island of MELOS. This operation will furnish additional areas from which aircraft can be operated. It will place the UNITED NATIONS forces across the AEGEAN line of supply to CRETE and the BLACK SEA.

(2) The UNITED NATIONS position in the AEGEAN could also be improved by advancing northward to LEMNOS. Occupation of this island would place the UNITED NATIONS across the line of communications through the DARDANELLES. Even though the UNITED NATIONS succeeded in occupying LEMNOS, it could at any time be made untenable by AXIS

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air action. Possession of LEMNOS would also provide a forward base for air support of an amphibious attack on SALONIKA. Such an attack, however, should not be launched prior to TURKEY's entry into the war, and in that event a land advance from TURKEY in EUROPE is more acceptable. The improvement of the UNITED NATIONS position resulting from an advance northward to LEMNOS would not be commensurate with the cost of the operation.

b. Concept of the operation. (See Chart, Appendix "B")

An amphibious and airborne operation launched from bases in the DODECANESE to seize and occupy the islands of NAXOS, PAROS, and MELOS.

Phase I. The gaining and maintaining of air superiority over NAXOS and PAROS.

Phase II. Amphibious and airborne landing operations to seize and occupy the islands of NAXOS and PAROS.

Phase III. The occupation of MELOS.

c. Forces required.

(1) Air.

Bombers (Medium)	10 groups	570 a/c
Bombers (L/D)	4 "	228 a/c
Fighters	7 "	525 a/c
Troop Carriers	4 "	208 a/c
Photo Reconnaissance		4 a/c
Observation	1 squadron	24 a/c

Note: (a) It is assumed that 75% of the above aircraft will be operational.

(b) The aircraft employed in the static defense of the DODECANESE are not included in these figures.

(2) Ground.

Two Regimental Combat Teams
(amphibiously trained)

One Parachute Battalion

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(3) Naval.

(a) Covering force (IONIAN SEA)

- 4 Battleships
- 2 Aircraft Carriers
- 8 Cruisers
- 20 Destroyers

(b) Assault force.

- 35 LST
- 35 LCI(L)
- 35 LCT
- 18 Destroyers
- 24 PC's and SC's

Minesweepers, tugs, and miscellaneous craft as required.

d. Advantages.

(1) Will interdict AXIS supply routes through the AEGEAN to CRETE and the BLACK SEA.

(2) Will secure an advanced air base for a possible attack upon PELOPONNESUS and an additional base for an attack on CRETE.

e. Disadvantages.

(1) May prove a difficult position to seize and occupy and be a very costly air base from which to operate against CRETE and the PELOPONNESUS.

(2) Is a difficult amphibious operation moving directly into strong AXIS air defensive installations.

(3) Does not contribute materially to the collapse of ITALY.

(4) Will not seriously dislocate German strategic plans nor provide any substantial diversion of strength from the Russian Front.

(5) Is an unjustified diversion of UNITED NATIONS resources if no decisive operations are envisaged in this area.

(6) Imposes a greater strain on UNITED NATIONS shipping to maintain the position than that imposed by any other operation on the continent.

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NORTH J-35



AZORES

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(J.C.S. 319)

16 May 1943

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JOINT CHIEFS OF STAFF

SEIZURE OR PEACEFUL OCCUPATION OF THE AZORES

Note by the Secretaries

The attached study prepared by the Joint War Plans Committee is circulated for the consideration of the Joint Chiefs of Staff.

J. R. DEANE,

F. B. ROYAL,

Joint Secretariat.

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J.C.S. Regrading Memo 12-73

By Rt Date MAY 21 1973

SEIZURE OR PEACEFUL OCCUPATION OF THE AZORESReport by Joint War Plans Committee

1. A study to determine the merits and possibilities of a seizure of the AZORES either peacefully or by an occupation through force is contained in Enclosure "A." A brief thereof is set forth below.
2. The utilization of air and naval bases in the AZORES will contribute materially to meeting the U-boat threat by providing VLR land-based aircraft cover for the presently uncovered areas of the central North ATLANTIC.
3. The AZORES consist of a group of 9 islands. The three most important, SAN MIGUEL, TERCEIRA, and FAYAL, contain the majority of the population of 260,000. Level stretches of land are the exception. Landing beaches are scarce. The islands all have circumferential road systems but movement over the interior in most areas must be on foot.
4. There are two artificial harbors, PONTA DELGADA on SAN MIGUEL ISLAND, and HORTA on FAYAL ISLAND, which accommodate a limited number of vessels. Anchorage, exposed to the seaward, for large vessels can be found at PONTA DELGADA, HORTA, and ANGRA. It is estimated that the addition of the necessary floating maintenance and repair facilities sufficient to support 20 DE's would tax all port capacities to the maximum.
5. Two military airfields now exist on the islands, which should be capable of supporting VLR aircraft operations within 15 days of occupation. Additional sites are available for development.
6. Average weather conditions present no bar to the operation of land-based aircraft from the AZORES.
7. Portuguese armed forces in the AZORES are the best of the nation, but are lightly armed and equipped with obsolete aircraft. It is felt that their resistance to a well-balanced aggressive

force would be ineffective. They consist of:

Ground: 25,700 troops.
Air: 41 obsolete aircraft.
Naval: 2 DD's.

8. A peaceful utilization of the AZORES as an air and naval base would be preferable to an occupation by force. If peaceful negotiations should fail, preparations must be complete for an immediate occupation by force.

9. SPAIN'S reaction to either a peaceful or forced occupation of the AZORES would probably be the same, in either case reflecting apprehension for her position in the CANARY ISLANDS and resulting in diplomatic protests.

10. AXIS reaction to either a peaceful or forced occupation of the AZORES would probably result in strong blasts of propaganda pointing to our violation of the precepts of the ATLANTIC Charter. The likelihood of air attacks on PORTUGAL and attacks on Portuguese shipping would be less if the occupation were forced.

11. PORTUGAL'S price for a peaceful entry to the AZORES might consist of requests for additional economic aid, military supplies, and equipment, as well as protection by UNITED NATIONS armed forces. In the event of a forced occupation, she might seek reparation in terms of such aid, supplies, and protection. No full break with the UNITED NATIONS is anticipated.

12. It is estimated that the following would be required for an occupation by force:

Ground: 1 Division, Reinforced (Amphibiously trained).
Air: 1 Carrier Group, 36 F and 36 DB.
Naval: 2 BB, 1 CV, 2 CA or CL, 23 DD, 15 APA, 5 AKA.

This force to effect landings on FAYAL and TERCEIRA ISLANDS simultaneously, and subsequently to reduce SAN MIGUEL ISLAND.

13. The advantages to be obtained in utilizing the AZORES as an air base from which to combat the submarine menace, greatly outweigh the disadvantages which would accrue to their occupation.

ENCLOSURE "A"

SEIZURE OR PEACEFUL OCCUPATION
OF THE AZORES

STRATEGIC CONSIDERATIONS

1. Anti-submarine campaign.

An important weapon in the anti-submarine campaign is the VLR aircraft. The operation of this type of airplane from presently available bases should become highly effective late in the summer of 1943, and force the U-boat to areas that are out of range of bases now at our disposal. If the AZORES could be used as a base for VLR aircraft, the UNITED STATES-UNITED KINGDOM convoys could be re-routed through areas with more desirable flying weather, thus obtaining improved coverage. The UNITED STATES-NORTH AFRICA, and TRINIDAD-UNITED KINGDOM convoys could also follow routes along which they would receive complete cover. (See Appendix "A"). A considerable time would be required to place the AZORES bases in full operation after they are obtained. Therefore, early action is necessary if these bases are to be used during the critical periods in 1943.

2. Use of AZORES as aircraft ferrying staging point.

The possible use of air base facilities in the AZORES as a staging point for ferrying of long range aircraft to the UNITED KINGDOM, NORTH AFRICA, INDIA, and the FAR EAST should be borne in mind. The following comparative distances are significant:

MIAMI-NATAL-CASABLANCA 7,213 statute miles

NEW YORK-BOTWOOD-AZORES-CASABLANCA 3,881 statute miles

- a saving of 46%.

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ESTIMATE

3. General

a. The AZORES are a group of 9 islands with a distance of about 400 miles between the extreme islands, SANTA MARIA and FLORES. (See Appendix "B"). The largest island of the group is SAN MIGUEL, 40 miles long and 10 miles in width at the widest part. The islands have a population of approximately 260,000, congregated mostly on the only islands of importance in the group, SAN MIGUEL, TERCEIRA, and FAYAL. There are reputed to be more AZOREANS in the UNITED STATES than there are in the AZORES, as a result of which the people of the islands have strong economic and blood ties with their people who have emigrated to this country. However, the military forces in the AZORES come from PORTUGAL, so that bonds of understanding which exist between the people of the UNITED STATES and the AZORES do not extend to the armed forces of the islands.

b. The islands are volcanic in origin. All are rugged and hilly, with deep, narrow valleys. The maximum elevation throughout the islands is 7600 feet. Level stretches of land are the exception rather than the rule. Landing beaches are scarce. Movement over most of the interior of the islands must be on foot, although all of the islands have circumferential road systems capable of handling two-way normal traffic. Most of the roads, due to numerous defiles and a few bridges, could be blocked temporarily. Water is abundant in the coastal areas of the islands except on FAYAL where, during the summer, it is scarce and at all times is sufficient only for the local population. At HORTA is situated the principal cable station of the mid-Atlantic. SAN MIGUEL is served by an indifferent telephone system.

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4. Ports

There are only two all-weather ports in the AZORES, PONTA DELGADA on SAN MIGUEL ISLAND, and HORTA on FAYAL ISLAND. Both are artificial harbors, accommodating a limited number of vessels. Anchorage for large vessels at PONTA DELGADA, HORTA, and ANGRA is ample in size for all practicable purposes, but exposed to seaward. Total cargo capacity of all ports is about 1750 tons daily, mostly by lighter. Existing repair facilities are based entirely on local needs. It is estimated that no operating naval vessels of DE size or larger could base on the AZORES without adding to existing maintenance and repair facilities, and that the addition of floating maintenance and repair facilities sufficient to support 20 DE's would tax all port capacities to the maximum.

5. Airfields

a. An analysis of suitable air field sites follows:

<u>Island</u>	FAYAL	TERCEIRA	SAN MIGUEL	SAN MARIA
<u>Location</u>	FETEIRAS	LAGENS	SANTA ANA (RABO de PEIXE)	AREIAS
<u>Status</u>	Projected	Operational	Operational	Projected
<u>Class</u>	Emergency	Military	Military	Military

Runways

NW-SE:6000'x600'
NNW-SSE:4800'x400' NW-SE:4900'x300'
WNW-ESE:4500'x250' E-W:3900'x300'
NW-SE:3900'x300' NE-SW: 3700'x300'
NNE-SSW:2500'x210' N-S:2800'x300'

Now suitable
for the type
indicated

B(M),B(C), F, B(M), B(L), F,
C/T C/T

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	FAYAL	TERCEIRA	SAN MIGUEL	SAN MARIA
Can be made suitable for the types indicated in the number of days shown, by the work noted.	Utilities Aircraft 60 days Continued grading, construction of base facilities, graveling, metalling or steel matting surface.	All types 30 days Construction of hard standings, taxi ways, additional base facilities and extension and surfacing of existing runways.	Unknown ----- Some additional construction probably required.	All types 120 days Complete construction required. Reputed to be best site in Islands.

b. The above analysis indicates that initial operations of VLR aircraft from LAGENS air field in TERCEIRA ISLAND may be expected about 15 days after occupation. One squadron of 12 VLR aircraft can be accommodated initially. Estimated maximum capacity is 3 to 4 squadrons in 90 days with 1/2 fighter squadron. The capacity of SANTA ANA field (RABO de PEIXE) on SAN MIGUEL ISLAND for VLR aircraft is undetermined pending a definite survey of expansion possibilities.

6. Weather

The average temperature varies from 73° F. during the summer to about 58° F. in the winter. Fogs are infrequent, although there is sometimes a haze which reduces visibility. There is much cloudy weather from November to April. During this period the clouds form and persist mostly on the windward side of the islands. There are no indications that any weather conditions, except gales which may be expected occasionally, would interfere with the operation of land-based planes.

7. Enemy forces

a. Ground forces in the AZORES total 25,700, distributed as follows (See Appendix "B"):

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(1) SAN MIGUEL ISLAND - 15,900, consisting of 3 infantry regiments, a total of 12,500 men, plus various artillery, engineer, and service units, totaling 3,400 men. Artillery consists of 3-6" coast defense guns, 10 French 75's, 5 - 120 mm.'s in emplacements, 12-105 mm. howitzers, and 8 Vickers 3.7 in.

(2) FAYAL ISLAND - 4,000 troops, consisting of 1 infantry regiment, 1 artillery regiment, plus engineer and service units. Artillery consists of 2 - 6" coast defense guns, 4 French 75's, 2 - 75 mm. field guns, and 4 Vickers 3.7 in.

(3) TERCEIRA ISLAND - 5,800 troops, consisting of 1 infantry and 1 artillery regiment, plus engineer and service units. Artillery consists of 3 French 75's, 4 other field guns, probably 75's, and 6 Vickers 3.7 in.

b. Aircraft in the AZORES total 41 obsolete planes. On SAN MIGUEL there are 13 Gladiator fighters, 2 Grumman amphibians, and 12 Grumman G44's. on TERCEIRA there are 14 Gladiators.

c. Naval forces on the AZORES total 2 destroyers, based at PONTA DELGADA.

PEACEFUL OCCUPATION BY NEGOTIATION

8. It is preferable to secure the use of the airfields and harbors of the AZORES by negotiation rather than by seizure. Nevertheless, all preparations necessary for Military occupation should be complete when negotiations are initiated so that occupation may follow immediately if negotiations fail.

9. Granting Portuguese acquiescence to an occupation, it is believed that SPAIN would register a protest and would become apprehensive of her position in the CANARY ISLANDS. Assurances on the part of GREAT BRITAIN and the UNITED STATES, given simultaneously with the occupation, should assist in countering these fears. It is believed that no overt act on the part of SPAIN need be anticipated. Any negotiations which would involve the employment of UNITED NATIONS forces in PORTUGAL would be unacceptable.

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10. The AXIS probably would react by propaganda, devoted to the theme that the Portuguese consent was forced, together with comments on the violation of weaker nations in direct contradiction to the precepts of the ATLANTIC Charter. Reprisals against the Portuguese in the form of bombing raids on PORTUGAL and attacks on shipping are considered to be the maximum measures which the AXIS can take. These are unlikely as they would tend to drive the Portuguese further into the UNITED NATIONS camp. Such reprisals, or their threat would, however, undoubtedly result in demands by PORTUGAL upon the UNITED NATIONS for anti-submarine and anti-aircraft protection and materiel.

11. The garrison required for a peaceful entry of the AZORES should consist of troops to operate the air bases and radar installations plus the necessary airdrome defense battalions. These units would be augmented initially by the construction units.

OCCUPATION BY FORCE

12. General.

a. The Military occupation of the AZORES, as an alternative to acquiring the desired bases by negotiations, will require that an amphibious force be in readiness for an immediate seizure. This step will require a larger garrison force than would a peaceful entry.

b. The traditional British friendship and alliance with PORTUGAL might be severed if British forces were employed in the seizure of the AZORES. The UNITED NATIONS will desire to retain certain privileges in PORTUGAL. To insure the retention of diplomatic relations with at least one member of the UNITED NATIONS it would seem desirable for an occupation in force to be made by the UNITED STATES. The use of Brazilian troops with the UNITED STATES forces does not appear sound. The ethnological ties between BRAZIL and PORTUGAL might

jeopardize the negotiations and the operation; some Brazilians would undoubtedly inform the Portuguese. In view of these considerations, it appears that only UNITED STATES forces should be employed in the seizure of the AZORES.

c. The Portuguese forces in the AZORES probably would offer only slight resistance, and although PORTUGAL would make strong protests against our action, a break with all the UNITED NATIONS or adherence to the AXIS, is considered unlikely.

d. The Spanish and AXIS reactions would probably be identical to those which would occur as a result of a peaceful occupation. There would be less likelihood of AXIS reprisals.

13. Concept of the Operation.

a. Simultaneous ship-to-shore landings under carrier-based air cover with naval gun support to be effected on FAYAL and TERCEIRA ISLANDS with objectives as follows (See Appendix "B"):

(1) On FAYAL:

To seize the cable and radio facilities and secure the harbor at HORTA.

(2) On TERCEIRA:

To seize, secure, and place in operation the airfield at LAGENS.

b. Subsequent to the above, to eliminate resistance on and occupy SAN MIGUEL ISLAND, to secure and place in operation the airfield at RABO de PEIXE, and the harbor at PONTA DELGADA.

14. Forces required.

a. It is estimated that the following will be required for an occupation of the AZORES by force:

Ground:	1 Division, Reinforced (amphibiously trained).
Air:	1 Carrier Group, 36 fighters, 36 dive bombers.
Naval:	2 BB, 1 CV, 2 CA or CL, 23 DD, 15 APA, 5 AKA.

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The above force may appear to be excessive but it is felt that such a show of strength will induce the defenders to offer limited resistance only, and that the provision of the force listed will permit occupation with the minimum loss of life and materiel.

b. It is estimated that the force indicated below should be available initially for a garrison:

Ground: 1 Division, Reinforced.

Air: 1 Fighter Squadron.

1 A/S Squadron (VLR).

Naval: 6 173' PC's.

Local HD craft as required.

c. After the situation has been clarified, it is believed that the ground force garrison could be reduced to the equivalent of a reinforced regimental combat team.

ADVANTAGES

15. The UNITED NATIONS will have a base from which anti-submarine air protection can be provided for the remaining portions of the presently unprotected areas of the principal ATLANTIC convoy routes.

16. The occupation by the UNITED NATIONS will deny the islands to the enemy as possible minor clandestine submarine refueling stations.

DISADVANTAGES

17. Reaction to the occupation of the AZORES without PORTUGAL'S consent will possibly result in unfavorable political repercussions in that country and in SPAIN.

18. Occupation of the AZORES with PORTUGAL'S consent might invite AXIS reprisals resulting in demands by PORTUGAL upon the UNITED NATIONS for anti-submarine and anti-aircraft protective measures and materiel.

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19. Occupation of the AZORES with PORTUGAL's consent will probably invite unfavorable political repercussions in SPAIN.

CONCLUSIONS

20. The utilization of air and naval bases in the AZORES will contribute materially to meeting the U-boat threat by providing VLR land-based aircraft cover for the presently uncovered areas of the central north ATLANTIC.

21. The UNITED STATES should proceed immediately to prepare a force to seize the AZORES in the face of armed resistance.

22. If the negotiations for a peaceful entry fail, the UNITED STATES should proceed at once to occupy the AZORES and establish air and naval bases thereon required to meet the submarine menace.

23. If permission is granted for a peaceful occupation, the required construction and garrison forces should be immediately dispatched to prepare and secure the necessary air and naval bases in the AZORES.

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APPENDIX A

