

Introduction

Hybrid Warfare in History

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In his magisterial work *On War*, Prussian military philosopher Carl von Clausewitz writes, “War is more than a true chameleon that slightly adapts its characteristics to the given case.”¹ He goes on to state that “war is a remarkable trinity” composed of violence and hatred, chance and probability, and political considerations – elements that play out through the interaction of people, military forces, and governments. These factors have been a part of war since the dawn of recorded history. Nevertheless, as war in the twenty-first century morphs into seemingly unfamiliar forms that combine regular and irregular forces on the same battlefields, some defense analysts have posited the emergence of a new type of war – hybrid war.

That buzz word has become fashionable among both civilian and military leaders in the Pentagon and elsewhere. However, as Clausewitz stated nearly two centuries ago, although war changes its characteristics in various circumstances, in whatever way it manifests itself, war is still war. War in the twenty-first century has been and will remain a complex phenomenon, but its essence has not and will not change. Through a careful examination of history, this study illustrates that although there is little new in hybrid war as a concept, it is a useful means of thinking about war’s past, present, and future.

The lines of warfare in the twenty-first century are becoming increasingly blurred. America’s security challenges include state-on-state wars, counterinsurgency conflicts, terrorism, and combinations thereof.

¹ Carl von Clausewitz, *On War*, ed. and trans. Michael Howard and Peter Paret (Princeton, 1976), p. 89; originally published as *Vom Kriege*, 1832.

U.S. conventional military superiority, at least for the immediate future, will force potential opponents to develop alternate means to achieve their goals and oppose American power. Increasingly, those means will include conventional as well as irregular – or hybrid – forces working in tandem.² Potential enemies will blend various approaches to war to fit them within their strategic cultures, historical legacies, geographic realities, and economic means. Against such enemies, technological superiority is useful but insufficient. As the wars in Iraq and Afghanistan have underlined, turning battlefield victories into long-term strategic gains also requires an understanding of history and culture, in other words “the other,” as well as adequate numbers of troops with the requisite military skills and cultural savvy to secure populations and deal with the root causes of societal violence.

Hybrid warfare will be a critical challenge to the United States and its allies in the twenty-first century, a challenge openly recognized by the U.S. defense establishment.³ To counter hybrid opponents, however, the United States and its allies must first understand the characteristics of hybrid warfare. Regrettably, the intellectual apparatus of the American military, namely the staff and war colleges, has on the whole failed to understand the future by reference not only to the distant past but to the immediate past as well. We have compiled this collection of essays, the result of a conference at the Mershon Center for International Security Studies at The Ohio State University in May 2010, because we believe that history has a great deal to say about hybrid warfare as well as other issues. The sooner not only historians but also the larger defense intellectual community examine past examples of hybrid warfare as well as present ones, the better will be the prospects for the future utilization of U.S. military power.

This collection of essays represents a first step toward examining the nature of hybrid conflicts more closely. We have defined hybrid warfare as conflict involving a combination of conventional military forces and irregulars (guerrillas, insurgents, and terrorists), which could include both state and nonstate actors, aimed at achieving a common political purpose. Irregular forces need not be centrally directed, although in many cases

² Frank G. Hoffman, “Hybrid Warfare and Challenges,” *Joint Forces Quarterly* 52, First Quarter 2009, pp. 34–39; Max Boot, *War Made New: Technology, Warfare, and the Course of History 1500 to Today* (New York, 2006), pp. 472–473.

³ “‘Hybrid War’ to Pull US Military in Two Directions, Flournoy Says,” *Defence Talk*, May 6, 2009, accessed at <http://www.defencetalk.com/hybrid-war-to-pull-us-military-18521/>.

they form part of a coherent strategy used to oppose an invader or occupation force.⁴ Hybrid warfare also plays out at all levels of war, from the tactical, to the operational, to the strategic. In particular, military organizations must not ignore the political framework and its narrative within which all wars occur. At the strategic level, nations might choose to support insurgent movements with conventional forces to weaken an adversary, much as the French did when they allied with the Americans in 1778 to weaken the British. At the operational level, a commander might use guerrilla forces to harass enemy lines of communication or prevent the enemy from massing forces, as General Nathanael Greene did in the Southern campaign in 1780–1781 in the American Revolution. Finally, regular and irregular forces might occasionally join tactically, as they did at the Battle of Cowpens in 1781.

“Hybrid threats,” writes Frank Hoffman, “blend the lethality of state conflict with the fanatical and protracted fervor of irregular warfare.”⁵ Hybrid war does not change the nature of war; it merely changes the way forces engage in its conduct. However it is waged, war is war. Much as the term “combined arms” describes the tactical combination of infantry, armor, artillery, engineers, and other branches of service in battle, the term “hybrid warfare” is a useful construct to analyze conflicts involving regular and irregular forces engaged in both symmetric and asymmetric combat. Although there may be some slight differences in how our authors define the term “hybrid warfare,” we have allowed them to pursue these scholarly variations because such an approach further underlines the complexity of the subject.

Despite its prominence as the latest buzz word in Washington, hybrid warfare is not new. Its historical pedigree goes back at least as far as the Peloponnesian War in the fifth century BC. During the conflict between Athens and Sparta, the Spartans recognized they needed to keep significant forces in Laconia and Messenia to prevent an uprising by the Helots, upon whose backs their agricultural and military systems rested. Athenian stratagems such as the move to build an expeditionary base at Pylos rested in part on the aim of creating the conditions for a Helot

⁴ Some historians and analysts create a distinction between “hybrid” and “compound wars,” stating that the latter involve regular and irregular forces fighting under unified strategic direction, whereas the former is a special case in which regular and irregular capabilities are fused into a single force. See Frank G. Hoffman, “Hybrid vs. Compound War,” *Armed Forces Journal*, October 2009. For this study, we make no such distinction between hybrid and compound war.

⁵ Hoffman, “Hybrid Threats,” p. 5.

uprising, which would then add an irregular dimension to the conventional conflict. After Athenian forces fortified Pylos on the southwest coast of the Peloponnese in 425 BC, they garrisoned the outpost with Messenians of Naupactus, whose ancestors the Spartans had expelled from the area after the great Helot uprising of 464 BC. The Messenians began a series of incursions into Laconia, aided by their ability to speak the local dialect. Helots soon began to desert to Pylos, thereby creating a national emergency in Sparta. This insurgency represented a form of war for which the exceptional Spartan phalanxes were ill suited. The Athenian historian Thucydides records, “The Spartans, hitherto without experience of incursions or a warfare of the kind, finding the Helots deserting, and fearing the march of revolution in their country, began to be seriously uneasy, and in spite of their unwillingness to betray this to the Athenians began to send envoys to Athens, and tried to recover Pylos and the prisoners.”⁶ The mere threat of hybrid war had brought the Spartans to terms.⁷

As examples throughout history suggest, hybrid opponents form a difficult and often powerful combination. Simply put, the existence of conventional forces requires a military force to mass against them, but doing so makes logistical lifelines and contested areas vulnerable to insurgents, guerrillas, and other irregular forces. The German Army on the Eastern Front during World War II suffered continual disruptions to its lines of communication as a result of the activity of tens of thousands of Soviet partisans and other irregulars, many remnants of conventional forces bypassed during the opening phases of Operation Barbarossa. The brutality of German *Einsatzgruppen*, SS police units, and other security forces could not suppress the partisans, despite the mass murder of hundreds of thousands of Soviet citizens in attempts to do so. Moreover, because of the strength of Soviet conventional forces, the Wehrmacht could not afford to release units from the front to deal with the threat to its rear.⁸

Prime Minister Winston Churchill also recognized the power of using irregular forces to combat the Wehrmacht in conjunction with regular military operations. In July 1940, he charged a new organization, the

⁶ *The Landmark Thucydides*, ed. Robert B. Strassler (New York, 1996), pp. 245–246.

⁷ Regrettably, the Athenian assembly refused the Spartan peace overture and the war continued. Thebes eventually ended Spartan hegemony over Greece after the Battle of Leuctra (371 BC) by reestablishing the independence of Messenia, thereby freeing the Helots and devastating the Spartan economy.

⁸ Leonid Grenkevich, *The Soviet Partisan Movement, 1941–1944: A Critical Historiographical Analysis* (London, 1999).

Special Operations Executive (SOE), with the mission to “set Europe ablaze.”⁹ For the next several years, British agents assisted local resistance movements, British aircraft delivered arms and ammunition to partisan forces, and SOE operatives engaged in sabotage of Nazi facilities throughout Western Europe and the Balkans. In the end, Britain could not have won the war by using only a combination of strategic bombing, naval blockade, and the encouragement of revolts in Europe. Nonetheless, resistance movements provided a boost to Allied forces when they returned to Europe after D-Day, and they proved especially useful in delaying German reinforcements headed to the Normandy battlefield.¹⁰

Hybrid warfare is not just a Western phenomenon, as the Second Sino-Japanese War from 1937 to 1945 shows. Mao Tse Tung and his generals became experts on mixing regular and irregular forces to attack the enemy in both a symmetric and asymmetric manner. Indeed, Mao clearly viewed guerrilla and conventional forces as existing on the same continuum. After the Japanese surrender, his Communist forces used the techniques of hybrid warfare against their Nationalist enemies. Regular Communist divisions were very good, as they demonstrated in battle not just against the Nationalist forces of Chiang Kai-shek in China but also against U.S. forces in Korea in 1950. Nationalist forces actually outnumbered the Communists, but harassment by hundreds of thousands of guerrillas led to the dispersal of much of the Nationalist strength. Hybrid warfare enabled Mao’s forces to gain superiority at critical points in China during the campaigns of 1948–1949, which ended with the ejection of the Nationalists from the mainland to Formosa (Taiwan). Communist victory in the Chinese Civil War further validated the effectiveness of hybrid warfare in the right geographic, historical, and cultural circumstances.¹¹

There are also cases in which both sides in a conflict used hybrid warfare against their adversary. Perhaps the prime example of this was the French and Indian War in North America from 1755 to 1763. Initially, the French held the edge because of their use of Indian auxiliaries and

⁹ Gerhard L. Weinberg, *A World at Arms: A Global History of World War II* (Cambridge, 1994), p. 150.

¹⁰ Max Hastings, *Das Reich: The March of the 2nd SS Panzer Division Through France* (New York, 1981).

¹¹ Gary J. Bjorge, “Compound Warfare in the Military Thought and Practice of Mao Zedong and the Chinese People’s Liberation Army’s Huai Hai Campaign (November 1948 – January 1949),” in *Compound Warfare: That Fatal Knot*, ed. Thomas M. Huber (Leavenworth, KS, 2002), pp. 169–219.

unconventional methods, but by 1759, both sides were using a combination of regular military forces, colonial militias, and native irregulars to contend for mastery of the North American continent. British adaptation to French-Canadian methods doomed France to defeat as Indian scouts, American rangers, and British light infantry took their place alongside conventional Redcoat battalions. British commanders such as James Wolfe and Jeffrey Amherst even went so far as to use light infantry and rangers to raid French-Canadian settlements, thereby wreaking havoc on morale and causing desertions as militiamen left the ranks to protect their families.¹²

The French commander, the Marquis de Montcalm, actually degraded the capabilities of his forces by shunning the type of warfare practiced so successfully by the natives and French Canadians in earlier decades. Instead, he offered the British an opportunity to engage in a conventional war in which the side with the bigger battalions held all of the advantages. No longer possessing a conceptual or tactical advantage over their opponents, the 6,000 French soldiers in Canada and the Ohio River Valley had no hope of defeating 44,000 British and Colonial soldiers and sailors arrayed against them.¹³ The British seizure of Quebec in 1759 and Montreal the next year sealed the French defeat.

Western militaries have occasionally used hybrid warfare to their advantage in the modern era. The British campaign against Ottoman Turkey during World War I benefited from an uprising of Arab tribes led by Grand Sherif Hussein bin Ali and aided by the talents of Captain T. E. Lawrence (“Lawrence of Arabia”). Arab irregular forces tied down thousands of Ottoman troops through continual attacks against the Hejaz railway and on occasion defeated Turkish forces in battle. Arab guerrillas provided intelligence on Ottoman positions and disrupted Turkish supply columns. The Turks struggled to come to grips with this seemingly invisible foe. “It seemed a regular soldier might be helpless without a target,” wrote Lawrence, “owning only what he sat on, and subjugating only what, by order, he could poke his rifle at.”¹⁴ By spreading Turkish forces thin across Arabia, these activities materially aided General Edmund Allenby’s campaign against Turkish forces in Palestine,

¹² Michael D. Pearlman, “The Wars of Colonial North America, 1690–1763,” in *Compound Warfare*, p. 35.

¹³ *Ibid.*, 12. For the most outstanding discussion of the conflict for North America during the Seven Years War, see Fred Anderson, *Crucible of War: The Seven Years War and the Fate of Empire in British North America, 1754–1766* (New York, 2001).

¹⁴ T. E. Lawrence, *Seven Pillars of Wisdom* (London, 1962), p. 198.

which climaxed in the crushing British victory at Megiddo in September 1918.

Throughout history, hybrid adversaries have been willing and able to extend wars in time and space to achieve their goals over the long run. Unless great powers possess a deep commitment, time is on the side of their hybrid opponents. If the clock runs out, the side that possesses the ground wins by default. This temporal aspect has represented a major challenge to militaries engaged in conflict outside their homelands against hybrid adversaries, a point made by T. E. Lawrence when he wrote of the Arab revolt, "Final victory seemed certain, if the war lasted long enough for us to work it out."¹⁵ Hybrid adversaries test the strategic patience of their opponents.

Despite the success of Allenby's campaign in the Middle East during World War I, hybrid war usually worked against Western military powers in the twentieth century, as the wars of colonial devolution attest. France's attempt to retain its empire after its resurrection after World War II illustrates the difficulty that Western powers have experienced in defeating hybrid adversaries willing to wait out the clock. In Indochina, the Viet Minh, under the political leadership of Ho Chi Minh, contested French control after the Japanese surrender in September 1945. Initially, French military forces outclassed their Vietnamese adversaries. For several years, Viet Minh guerrillas harassed French occupation troops, but lack of arms and ammunition limited their efforts. The victory of the Communists in the Chinese Civil War in 1949 dramatically altered the strategic balance. Chinese advisers, weapons, and training transformed the Viet Minh into a hybrid military force. With Chinese assistance, General Vo Nguyen Giap reorganized part of the Viet Minh irregular forces into five conventional infantry divisions (he would later add an artillery division to the mix). With this retooled force, the Viet Minh soon contested French control of the border region between Vietnam and China, while Viet Minh guerrillas harassed the French in the Red River Delta.¹⁶

The French, under the leadership of General Jean de Lattre de Tassigny, created a series of fortifications (the De Lattre Line) to shield the delta from the Viet Minh. For a time, the line held as Viet Minh divisions took heavy losses in efforts to breach the perimeter. Giap then withdrew his

¹⁵ *Ibid.*, p. 202.

¹⁶ Bernard B. Fall, *Street Without Joy: The French Debacle in Indochina* (Harrisburg, PA, 1961).

divisions into the jungle and contested the Red River Delta by means of guerrilla operations. In an attempt to draw Viet Minh formations into a conventional battle, in 1952 the French began to deploy their formations in fortified positions beyond the De Lattre Line. French forces enjoyed some success during Operation Lorraine and the Battle of Na San (23 November to 4 December 1952), inflicting several thousand casualties on Giap's forces. He countered by expanding the war into Laos in 1953. To thwart the Viet Minh move, the new French commander, General Henri Navarre, created an air-land base at Dien Bien Phu, 175 miles west of Hanoi. Giap responded by moving several divisions to the area, where they seized the high ground surrounding the airstrip and systematically overran the French forces hilltop by hilltop. On 8 May 1954, the final French position, Strongpoint Isabelle, fell to Viet Minh forces and the remaining French forces entered captivity.¹⁷

The Viet Minh victory at Dien Bien Phu was a stunning blow to the French position in Indochina, but the fact is that the French still held Hanoi, the Red River Delta, and most of the southern part of Vietnam. The will of the French to continue the fight, however, had collapsed. They could not contest the Viet Minh in the battle of narratives that shaped the perceptions of the Vietnamese that this was a fight for their nation against foreign occupiers. Nor did the French create a satisfactory political alternative to the Viet Minh. The Vietnamese rejected efforts to empower the former Vietnamese Emperor Bao Dai, correctly sensing he was little more than a French puppet. Thus, when French political will collapsed, the Viet Minh emerged victorious. The best the French could do was to agree to a compromise peace that left the Viet Minh in possession of the northern part of the country, with vague promises of later nationwide elections. These never took place.

As the French experience in Indochina suggests, political will is a crucial component of hybrid warfare – as it is in all wars. Even had the French won at Dien Bien Phu, chances are that the Viet Minh would still have emerged victorious. One need look no further than Algeria, which most Frenchmen agreed in 1954 was an integral part of their country. Having learned its lessons from the Vietnam debacle, the French Army performed much better in a military sense in combating Algerian insurgents. Indeed, by the end of the decade, the Algerian insurgency was on the ropes. By then, however, the French will to continue the struggle

¹⁷ Bernard B. Fall, *Hell in a Very Small Place: The Siege of Dien Bien Phu* (New York, 1966).

had evaporated. In 1962, President Charles De Gaulle granted Algeria its independence.¹⁸

By extending conventional war to include the people, hybrid forces amplify their otherwise limited power and extend the conflict in both time and space, thereby providing a chance to win a protracted contest of wills when they could not otherwise achieve a conventional military victory. While regular military forces conduct conventional operations against the armed forces of their opponent, irregular forces work to achieve control over the population. This dichotomy is why the French failed so disastrously in Indochina; although they could defeat Viet Minh conventional divisions in most circumstances, they could not simultaneously control the Vietnamese people. In the end, the lack of a stable indigenous partner and sufficient local forces to assist in securing and stabilizing the population doomed the French effort.

The French lost the battle of narratives with their Vietnamese and Algerian opponents. To a certain extent, all war includes a battle of narratives, namely which side possesses the moral high ground or can convince the people of the justice of its cause. By bringing the population into the conflict, hybrid warfare magnifies the importance of perceptions. Although wartime propaganda is a time-honored tradition as far back as the ancient world, modern communications systems such as the Internet, satellite television, and radio radically amplify the transmission rates of propaganda and public information. Insurgents realize that military actions are but a supplement to the information war, by which they try to sway perceptions of both their own people and the enemy's population.

As counterinsurgency expert John McCuen points out, the battle over competing narratives plays out among three audiences: the indigenous population, the home front of the great power, and the wider international community.¹⁹ Great powers risk losing conflicts in which they fail to understand either the human terrain or the "decisive battlegrounds of public opinion at home and abroad."²⁰ In hybrid wars, conventional military forces conduct operations to defeat their regular opponents, while other military forces and interagency assets must work to clear areas of irregular forces, to control those areas over the long term, and to counter-organize the population in order to pacify it. Military success and the establishment of legitimacy among the population will lead to increased

¹⁸ Alistair Horne, *A Savage War of Peace: Algeria, 1954–1962* (London, 1977).

¹⁹ John J. McCuen, "Hybrid Wars," *Military Review*, March–April 2008, pp. 107–113.

²⁰ *Ibid.*, p. 107.

home-front and international support, without which great powers risk defeat.²¹

Sadly, America's enemies have, more often than not, proved more adept than the United States at harnessing the power of propaganda and influencing public perceptions. The land of Madison Avenue and Wall Street has found itself consistently outmaneuvered in the media space by al Qaeda operatives working with a laptop computer and an Internet connection. In the modern information environment of instantaneous communications and 24/7 news coverage, the United States must become more adept at engaging in the battle of narratives that can determine the difference between victory and defeat. Even when military forces of a great power enjoy enormous success, as U.S. forces did in destroying the bulk of the Viet Cong during the Tet Offensive in 1968, failure to win the battle for public perception will lead to defeat. In the world of hybrid war, it is not enough to destroy the enemy's armed forces; to win, the indigenous, home-front, and international audiences must believe that the war is over. In other words, military success must lead to a commensurate political outcome as perceived by the affected populations.

As these examples have illustrated, a foreign power rarely can generate the military forces, financial wherewithal, and political commitment required to prosecute a hybrid war to an acceptable conclusion. Overlapping conflicts and interests in these wars often create "wicked problems" that cannot be solved, only managed. Historians who in retrospect posit facile solutions to these conflicts misread their complexity. In the quest for decisive outcomes, great powers all too often have succeeded only in miring themselves in quagmires.

The recent history of the wars in Afghanistan and Iraq attest to the validity of this statement. After the terrorist attacks on the World Trade Center in New York and the Pentagon in Washington, DC, on 11 September 2001, U.S. forces attacked the Taliban regime and al Qaeda terrorist bases in Afghanistan by using hybrid means. U.S. Special Forces and Central Intelligence Agency operatives teamed up with indigenous Afghan irregular forces of the Northern Alliance to battle Taliban militia. The U.S. military bolstered the war effort with heavy doses of air power and a conventional infantry unit, the 10th Mountain Division. This hybrid combination proved extremely effective at destroying Taliban formations when they stood their ground, but it was less adept at pursuing fleeing al Qaeda remnants into the mountains or in the

²¹ *Ibid.*, p. 111.

conduct of counterinsurgency operations since 2002. In December 2001, in a mountainous area of eastern Afghanistan known as Tora Bora, American commanders failed to deploy sufficient conventional military assets and instead relied on Afghan irregulars and air power to finish off al Qaeda. This decision doomed the mission to failure and allowed the escape of Osama bin Laden and his allies across the border into Pakistan. This was perhaps the most serious strategic and political error the United States made in the war against al Qaeda, only partially rectified by the 2011 raid that killed Osama bin Laden at a safe house in Pakistan. The insistence of Secretary of Defense Donald Rumsfeld on validating his “light footprint” approach to warfare allowed America’s greatest enemy to escape to fight another day.²²

In Iraq, too, the U.S. military has learned about hybrid war the hard way. In just three weeks of combat in March and April 2003, the U.S. military and its coalition partners destroyed the armed forces of Iraq and toppled the regime of Saddam Hussein. For President George W. Bush, Secretary of Defense Donald Rumsfeld, and all too many defense analysts, the results of the war seemed to validate their vision of high-tech armed forces capable of engaging in rapid, decisive operations to achieve quick victories in conventional warfare.²³ Advocates of defense transformation rooted that vision in the American military’s experiences from the end of the Vietnam War to the Iraq War – that is, a period of barely three decades, dominated by the end of the Cold War and the unipolar moment of U.S. superiority that followed. However, in the months after the seizure of Baghdad, the United States struggled to solidify its occupation of Iraq, an effort made more difficult by a growing insurgency that destabilized large portions of the country.²⁴ U.S. armed forces, organized, trained, and equipped to fight conventional enemies, were unprepared to counter a growing insurgency that by 2006 had pushed Iraq over the brink of civil war.

To understand why this happened, one needs to trace the history of doctrinal development in the U.S. Army from defeat in Vietnam to the

²² U.S. Senate Committee on Foreign Relations, *Tora Bora Revisited: How We Failed to Get Bin Laden and Why It Matters Today*, 111th Congress, 1st session, 30 November 2009, pp. 13–17, accessed at foreign.senate.gov/imo/media/doc/Tora_Bora_Report.pdf.

²³ United States Joint Forces Command, J9 Joint Futures Lab, “A Concept for Rapid, Decisive Operations,” 9 August 2001.

²⁴ Tom Ricks, *Fiasco: The American Military Adventure in Iraq, 2003 to 2005* (New York, 2007); Peter R. Mansoor, *Baghdad at Sunrise: A Brigade Commander’s War in Iraq* (New Haven, CT, 2008).

beginning of the Iraq War in 2003. In the wake of defeat in Vietnam, the U.S. Army entered a period during which it almost totally ignored the lessons of the counterinsurgency war it had waged during the previous decade and instead turned its attention to the high-tech, conventional war it potentially faced against the Red Army in Europe.²⁵ Senior officers concluded that Vietnam represented an exception to the conflicts that U.S. forces would wage in the future. Moreover, they argued that the United States should avoid such conflicts. For its part, the institutional army did its best to forget Vietnam by ridding itself of material associated with the conflict and disregarding lessons learned in waging counterinsurgency in Southeast Asia.²⁶

For a time, events proved them correct. The army experienced a doctrinal renaissance in the late 1970s and 1980s, embodied first in the theory of active defense and later in the more successful concept of air–land battle. Army and marine forces fought mock conventional battles at combat training centers in California, Arkansas, Louisiana, and Germany that superbly prepared them for the realities of conventional combat. The stunning victory in the Gulf War of 1991 emboldened President George H. W. Bush to declare, “By God, we’ve kicked the Vietnam syndrome once and for all!”²⁷

Of course, part of the Vietnam syndrome was the avoidance of counterinsurgencies, and the Gulf War did nothing to convince the American military to abandon that attitude. During the 1980s, the United States had successfully supported a counterinsurgency campaign in El Salvador with just 55 military advisers – a light footprint of Special Forces replicated in the U.S. support of the Northern Alliance in Afghanistan in 2001. The lack of activity in this realm after the Cold War convinced one strategic analyst to write in 1995 that “the insurgents of the world are sleeping.”²⁸

The lack of insurgent threats to national security convinced most military analysts to focus their thinking on great power confrontation and a coming revolution in military affairs, the latter a reflection of the lopsided

²⁵ Many U.S. Army leaders never really understood counterinsurgency warfare, even after years of conflict in Vietnam. They preferred to treat the war as a conventional military operation rather than as a hybrid conflict with multiple dimensions. See Andrew F. Krepinevich, Jr., *The Army and Vietnam* (Baltimore, MD, 1986).

²⁶ Conrad C. Crane, *Avoiding Vietnam: The U.S. Army’s Response to Defeat in Southeast Asia* (Carlisle, PA, 2002).

²⁷ George C. Herring, “America and Vietnam: The Unending War,” *Foreign Affairs*, Winter 1991/1992.

²⁸ Steven Metz, *Counterinsurgency: Strategy and the Phoenix of American Capability* (Carlisle, PA, 1995), p. 1.

victory of the United States and its allies in the Gulf War. The combination of advanced intelligence, surveillance, and reconnaissance systems and precision-guided munitions would supposedly provide the American military a decisive edge in future conventional warfare. The key, these analysts believed, was to perfect the information-precision revolution in military affairs to ensure that the United States retained a decided advantage over potential conventional adversaries. Who those potential adversaries were, however, was an open question. No other nation in the world had developed conventional capabilities even approximating those of U.S. forces, nor were they likely to do so in the foreseeable future. Concepts such as network-centric warfare, therefore, aimed at destroying mirror-imaged enemies. By the turn of the millennium, the U.S. military was well on its way to developing a system perfectly suited to fight itself.²⁹

The descent of the U.S. Army and Marine Corps in Iraq between 2003 and 2006 into a morass partly of their own making convinced some to rethink the doctrinal basis for counterinsurgency operations. A number of mid-grade officers in Iraq instituted counterinsurgency tactics and procedures to guide the operations of their units, most notably Colonel H. R. McMaster in Tal Afar in 2005 and Colonel Sean MacFarland in Ramadi in 2006.³⁰ Under the leadership of Lieutenant General David Petraeus and Lieutenant General James Mattis, the two services produced an updated doctrinal manual for counterinsurgency warfare, Field Manual 3-24, in December 2006.³¹ Despite the success of this doctrine during the surge of U.S. forces to Iraq in 2007–2008, some analysts worry that the doctrinal pendulum has swung too far away from conventional warfare and that the American military is in danger of losing critical war-fighting capabilities. Yet, the debate should not be an either–or proposition.³² Future wars

²⁹ For proponents of network-centric warfare, see Admiral William A. Owens, *The Emerging U.S. System-of-Systems* (Washington, DC, 1996); Vice Admiral Arthur Cebrowski and John Gartska, “Network-Centric Warfare: Its Origin and Future,” *Naval Institute Proceedings*, January 1998; and David S. Alberts, John Gartska, and Frederick P. Stein, *Network Centric Warfare: Developing and Leveraging Information Superiority* (Washington, DC, 1999). For some critiques, see Milan Vego, “Net-Centric Is Not Decisive,” *Proceedings*, January 2003; and H. R. McMaster, “Learning from Contemporary Conflicts to Prepare for Future War,” *Orbis*, Fall 2008, pp. 564–584.

³⁰ George Packer, “The Lesson of Tal Afar,” *New Yorker*, April 10, 2006; Jim Michaels, *A Chance in Hell* (London, 2010).

³¹ Field Manual 3-24, “Counterinsurgency,” Department of the Army, December 2006.

³² The either–or nature of the debate on force structure and doctrine is exemplified by John A. Nagl, “Let’s Win the Wars We’re In,” and the response by Gian P. Gentile, “Let’s Build an Army to Win All Wars,” *Joint Force Quarterly* 52, First Quarter 2009, pp. 20–33.

will likely entail an increasingly vague distinction between the conventional and the irregular; indeed, these forms will meld into one, thereby creating a hybrid form of war that takes advantage of the most effective parts of conventional and irregular operations.³³

Hybrid warfare in the twenty-first century will prove to be even more dangerous as a result of the proliferation of advanced weaponry. Irregular forces are increasingly armed with the latest weapons and technology, making them more difficult to combat. In the Iraq War, Shi'a militias used Iranian-made rockets and explosively formed projectiles to battle American forces equipped with the latest military technologies.³⁴ Explosively formed projectiles have proven capable of destroying the most advanced armored vehicles, such as the M1A1 tank. Other nonstate groups in the Middle East are armed with advanced anti-tank missiles, rockets, cruise missiles, and unmanned aerial vehicles. Even this aspect of hybrid warfare, however, is not new. More than a century ago in the Boer War, Boer forces used 75-mm and 155-mm Creusot guns, 120-mm Krupp mortars, 37-mm Vickers-Maxim automatic "pompom" guns, Mauser rifles, and Maxim machine guns to outclass (or at least equal) their British opponents.³⁵

Informed observers should not have been surprised, then, by Hezbollah's use of advanced anti-tank missiles to destroy Merkava tanks during the Israeli invasion of southern Lebanon in 2006. Indeed, Israel's war against Hezbollah and its more successful operations against Hamas in 2008 in Gaza demonstrate some of the difficult challenges faced by conventional armed forces in combating hybrid adversaries. Responding to the kidnapping of an Israeli soldier in northern Israel on 12 July 2006, Israeli Prime Minister Ehud Olmert authorized military operations against Hezbollah targets in Lebanon. The Israeli Air Force pounded Hezbollah positions and command and control centers, but Hezbollah fighters responded by firing large numbers of rockets into northern Israel. When the Israeli Defense Forces (IDF) attacked into southern Lebanon to clear the area of Hezbollah rocket teams, they came up against well-armed and trained militia, which inflicted stinging losses against their Israeli

³³ Frank Hoffman, "Hybrid Threats: Reconceptualizing the Evolving Character of Modern Conflict," *Institute for National Strategic Studies Strategic Forum* 240, April 2009, pp. 5–6.

³⁴ Richard Esposito and Maddy Sauer, "Iranian-Made IEDs Are the Most Deadly U.S. Forces Have Seen, and Their Use Is on the Rise," ABC News online, 30 January 2007, accessed at http://blogs.abcnews.com/theblotter/2007/01/iranianmade_ied.html.

³⁵ Byron Farwell, *The Great Anglo-Boer War* (New York, 1976), pp. 43–45.

opponents. Hezbollah fighters used advanced weaponry such as anti-tank missiles, anti-ship cruise missiles, rockets, and unmanned aerial vehicles to counter Israeli attacks. Meanwhile, Hezbollah skillfully employed the Internet and other media for its propaganda and to build a narrative that Hezbollah fighters were standing toe to toe against the IDF and winning.

The IDF, well trained for counterinsurgency operations on the West Bank and in the Gaza Strip, was not ready for the conventional fighting it encountered south of the Litani River. Theoretical concepts such as systemic operational design, developed over the preceding decade to guide Israeli doctrinal thinking, confused more than they clarified. For its part, the Israeli Air Force's reliance on the equally opaque effects-based operations – a concept developed by the U.S. Air Force and at the time fully embraced by transformation advocates in the United States – proved ill suited to achieving Israeli goals. Precision munitions directed by high-tech sensors proved useless without adequate intelligence with which to target the enemy, as Hezbollah forces camouflaged themselves exceptionally well. High-tech Israeli forces were often unable to locate their targets, and their operations failed to break Hezbollah's will to fight. In the event, precision munitions were not an effective substitute for sufficient numbers of well-trained infantry and effective combined-arms teams. At the strategic level, Hezbollah's adroit use of information and propaganda swayed world opinion from the early days of the conflict. After three weeks, Israel, commonly understood to have the most capable conventional armed forces in the Middle East, agreed to a cease fire without having achieved its objectives.³⁶

The Israeli military learned from its mistakes in Lebanon. Over the next two years, the IDF revisited its intellectual understanding of warfare and retrained its active and reserve forces to fight on both conventional and irregular battlefields. The Israelis rejected the use of effects-based operations that aimed to pound enemy targets with precision-guided munitions, while eschewing seemingly messy ground operations. Instead, the IDF sought ways to conduct combined-arms operations within the constraints of the hybrid battlefield. The Israelis also learned to compete in the realm of information warfare.

Thus, when the IDF invaded the Gaza Strip to combat Hamas fighters in January 2009 during Operation "Cast Lead," the Israeli forces

³⁶ Matt M. Matthews, *We Were Caught Unprepared: The 2006 Hezbollah-Israeli War* (Leavenworth, KS, 2008); Andrew Exum, *Hizballah at War: A Military Assessment*, Policy Focus #63 (Washington, DC, 2006).

were much better prepared to cope with hybrid challenges. They enjoyed improved intelligence and a better understanding of how the enemy would fight. Despite the profusion of mines, improvised explosive devices, tunnels, and other obstacles and fortifications, the IDF effectively used fire and maneuver to attain its objectives. It was particularly effective when fighting at night. Precision air strikes complemented but did not replace ground maneuver. Palestinian fighters attempted to replicate the success of Hezbollah militia in Lebanon and managed to fire dozens of rockets into Israel. Nevertheless, on every level, the Israelis decisively defeated Hamas in just under three weeks.³⁷

As this discussion and the following essays show, as the United States military prepares for the future, it would be a serious mistake to disregard the lessons of several thousand years of recorded history. The United States cannot merely focus on the wars it wants to fight and ignore the rest, for messy small wars have a way of challenging America despite U.S. conventional military superiority.³⁸ Indeed, as Williamson Murray notes in the chapter on the American Revolution, the United States was birthed in a hybrid war. It is all the more astonishing, then, that some policy makers in Washington look on the wars in which America is engaged today as something new. They are not.

American military forces must possess a wide range of means to combat hybrid opponents, from conventional power to counterinsurgency and counterterrorism capabilities. Combat power in hybrid war consists of more than just the tanks, artillery, infantry, aircraft, ships, and other weapons that a military force possesses. Intelligence, civil affairs, psychological operations, and interagency civilian capabilities are necessary to fight hybrid wars. A military force cannot fight one element of the enemy while ignoring the remainder. In this regard, the U.S. Army has acknowledged the simultaneity of combat and stability operations in its most current doctrine. Doctrine writers did well to eliminate the phased approach to combat and postcombat operations, for in the real world, they blur together.³⁹ The problem with the phased approach in Iraq in 2003, for instance, was a nearly singular focus on combat operations at the expense of so-called Phase IV stability operations. In the future, the U.S. military needs to prepare more effectively to fight irregular adversaries from the

³⁷ Scott C. Farquhar, *Back to Basics: A Study of the Second Lebanon War and Operations CAST LEAD* (Leavenworth, KS, May 2009).

³⁸ Max Boot, *The Savage Wars of Peace: Small Wars and the Rise of American Power* (New York, 2002).

³⁹ U.S. Army Field Manual 3-0, "Operations," Department of the Army, February 2008.

beginning, not just after a period of adjustment and adaptation. As the invasion of Afghanistan in 2001 underlined, the United States should also be ready to engage in hybrid warfare when conditions allow.

As the following chapters illustrate, effective political and military leadership is essential to victory in hybrid warfare. Political leaders set national objectives, work to bolster national will, and build and keep intact international coalitions to share resource burdens. They develop and explain the strategic narrative that maintains popular support for the war effort. Above all, they must understand the nature of their opponent as well as the extent of the commitment necessary to win the war. Military leaders must adjust existing doctrine to take into account the kind of war in which their forces engage, as well as to counter enemy strengths and exploit enemy weaknesses. Senior leaders must create viable operational concepts that link strategy to tactical actions. Leaders at all levels must gather lessons learned from ongoing military operations and alter doctrine, operational concepts, and strategy to meet unexpected challenges and opportunities. In a nutshell, leadership matters.⁴⁰

The nine case studies in this book are representative of the history of hybrid warfare from ancient times to the present. They span the ages from the Roman experience in Germania early in the first century AD, to the Nine Years' War in Ireland at the turn of the seventeenth century, to the American Revolutionary War, to Napoleon's war in Spain, to the U.S. Civil War, to the Franco-Prussian War, to the Boer War and the larger British experience with hybrid warfare over the centuries, to the Second Sino-Japanese War, and to America's hybrid struggle in the Vietnam War. This examination highlights the continuities of the historical experience; examines the changes wrought by new technology and doctrine; and analyzes the impact of geography, history, culture, religion, and other factors on hybrid warfare over the past two millennia. By shedding light on the past, we believe that this study will help as well to illuminate the future of warfare in the twenty-first century.

⁴⁰ For an examination of the crucial contribution of good leadership to success in counterinsurgency warfare, see Mark Moyar, *A Question of Command: Counterinsurgency from the Civil War to Iraq* (New Haven, CT, 2009).