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978-1-107-02608-7 - Hybrid Warfare: Fighting Complex Opponents from the Ancient World to the Present

Edited by Williamson Murray and Peter R. Mansoor

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I

Introduction

Hybrid Warfare in History

Peter R. Mansoor

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.

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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/>.

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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.

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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 Historical Analysis* (London, 1999).

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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.

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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.

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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).

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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).

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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.

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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.