

# **The Inadequacy of Definition and the Utility of a Theory of Hybrid Conflict: Is the “Hybrid Threat” New?**

**A Monograph  
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## **Abstract**

The Inadequacy of Definition and the Utility of a Theory of Hybrid Conflict: Is the “Hybrid Threat” New? by MAJ Timothy B. McCulloh, US Army, 57 pages.

The US has formally identified “hybrid threats” as the likely future threat it will face. Descriptions and definitions abound that address form and function of a hybrid threat, but do not address logic. The resulting lack of understanding leaves military professionals without a practical method of understanding hybrid organizations and warfare. A remedy to this situation is in producing a theory of hybrid warfare with universal applicability. The monograph develops and presents a theory that builds upon the existing literature of modern combat and hybrid warfare. It proposes that hybrid warfare occurs when a combatant bases its optimized force structure on the combination of available resources – both conventional and unconventional – in a unique cultural context to produce specific, synergistic effects against conventionally-based opponents. The monograph relies on analyses of two case studies; through which historical trends emerge that confirm seven principles and a theory of hybrid warfare. Those principles concern the presence of: specific ideology, existential threat, capability overmatch, unique context, defensive tactics, strategies of attrition and combinations of conventional, unconventional, criminal, and terrorist elements. Two case studies validate the resultant theory – Israel-Lebanon 2006 War and the Soviet Partisan movement of 1941-1945. The monograph includes recommendations for application and research.

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## **The Inadequacy of Definition and the Utility of a Theory of Hybrid Conflict: Is the “Hybrid Threat” New?**

The most likely security threats that Army forces will encounter are best described as hybrid threats.<sup>1</sup>

This monograph will attempt to answer the question of why hybrid actors, or hybrid threats, function in the specific manner that they do. In doing so, it proposes a theory of hybrid warfare which will set forth a series of principles observable in historical trends that provide a unifying logic to hybrid behavior. As this monograph outlines a theory of hybrid warfare, it explores the contemporary relevance of hybrid military organizations, the existing body of literature referring to hybrid threats, and historical examples of hybrid threats as they exemplify the proposed theoretical principles. This monograph will then conclude with a discussion of the proposed theory and the potential applications of a theory of hybrid warfare within the United States military.

The United States military is an organization which exists to support and defend the Constitution of the United States against all enemies, foreign and domestic.<sup>2</sup> Within this broad charter, there exists a requirement to confront real and potential adversaries. In order to do this, the United States must identify and understand likely threats in order to best prepare for this confrontation. Typically, across the spectrum of armed conflict contemporary threats are placed in one of three different categories – conventional, hybrid, and unconventional.<sup>3</sup> Military planning documents and strategies further indicate that hybrid threats will likely define the Contemporary Operating Environment (COE) as the preponderance in number and type of

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<sup>1</sup> Headquarters, Department of the Army, *Army Doctrinal Publication 3-0: Unified Land Operations* (Washington, DC: Department of the Army, 2011), 4.

<sup>2</sup> *Oath of Office*, Title 10, US Code; Act of 5 May 1960.

<sup>3</sup> 2010 Quadrennial Defense Review Report, February 2010, 8.

security threats that will be faced in the future; however, definitions of hybrid threats and hybrid warfare vary and contradict each other.<sup>4</sup> This variance and contradiction stymie the ability of military planners to prepare specifically to meet this challenge. Thus, this monograph will seek to clarify the discussion of hybrid organizations and hybrid warfare through the formulation of a theory suggesting principles of hybrid warfare.

In order to establish parameters for the following theoretical discussion and to avoid confusion during the following discussion, this monograph defines certain terms regarding a theory of hybrid warfare. Throughout this paper, the term regular and conventional force will be used interchangeably to define military organizations whose behavior conforms to national or international laws, rules, norms, or customs; and whose weapon systems and equipment conform to a commonly accepted standard of capabilities.<sup>5</sup> The term irregular or unconventional force involves a military type organization that does not conform to commonly accepted standards in either equipment or behavior.<sup>6</sup> This paper discusses the ample definitions of a hybrid force during the literature review of this paper. However, for the purposes of initiating the discussion of hybrid warfare, a hybrid force is a military organization that employs a combination of conventional and unconventional organizations, equipment, and techniques in a unique environment designed to

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<sup>4</sup> *Hybrid Warfare*, Global Accountability Office, 10 September 2010. This report was initiated at Congressional request to clarify the multiple, conflicting Defense Service definitions, and descriptions of hybrid war, hybrid warfare, and hybrid threats. The 29 page study's official finding was that the existing descriptions of hybrid war were sufficient to the needs of each service and that in the absence of a solidly quantifiably need for a definition that each service be allowed to continue in this manner.

<sup>5</sup> Retrieved from <http://www.merriam-webster.com/netdict.htm> on 5 APR 2012. To further explain the definition of conventional military forces we will include the use of conventional weapons platforms such as tanks, jet fighters, and/or soldiers. This idea of conventional military forces emerged from the Treaty of Westphalia in 1648. This definition describes both form and function.

<sup>6</sup> Retrieved from <http://www.merriam-webster.com/netdict.htm> on 5 APR 2012. This definition will include the concepts of guerilla warfare, asymmetric insurgencies, and unregulated militant forces – all of which will often use low tech weapon systems.

achieve synergistic strategic effects.<sup>7</sup> This definition relies on previous research – and discussions by hybrid theorists – on hybrid warfare as useful starting points for thinking about hybrid warfare within the spectrum of modern conflicts so that this monograph can add to the working knowledge of hybrid warfare within the defense community.

From this brief, albeit broad, definition of hybrid warfare certain observations can be made. A hybrid threat uniquely focuses on organizational capability and generally attempts to gain an asymmetrical advantage over purely conventional opponents within a specific environment. This advantage not only asserts itself in the realm of pure military force, but also in a more holistic manner across all the elements of national power including diplomatic, informational, military, economic, financial, intelligence, and law enforcement / legal. The advantage generates the effect of transitioning the rules of the battlefield from those of a conventional fight to those realms of a hybrid's choosing; primarily in the categories of tempo, depth, and intensity. As a result, a weaker military opponent can stand against a stronger one for an indefinite period and continue to generate effects that a more conventional opponent could not generate in the same situation. This hybrid capability poses significant difficulties for large conventional military organizations such as the United States military because these large conventional structures are oriented primarily on symmetrical type adversaries or in the lesser case on asymmetrical type adversaries – never on an efficient combination of the two. Thoroughly understanding this capability can offer insight into methods of understanding and predicting hybrid organizations.

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<sup>7</sup> Within this monograph, hybrid organizations are those that engage in hybrid warfare and hybrid threats are hybrid organizations viewed as an adversary. Holistically these terms will be used somewhat interchangeably as they focus on the core concept of hybridity.

Historical examples of hybrid type warfare reach back to antiquity, even though the term hybrid threat is relatively recent.<sup>8</sup> In ancient Rome a hybrid force of criminal bandits, regular soldiers, and unregulated fighters employed tactics ranging from that of fixed battle, road-side ambush, and the employment of stolen siege engines against Vespasian's Roman Legions during the Jewish Rebellion of 66 AD.<sup>9</sup> In the Peninsular War of 1806, a hybrid force of Spanish guerillas combined with regular British and Portuguese forces to generate decisive military effects on Napoleon's Grand Arme'e.<sup>10</sup> During World War II, the Soviet Army on the Eastern Front integrated and synchronized an ill-equipped irregular force with its conventional military forces in order to generate multiple hybrid type effects from 1941 to 1945.<sup>11</sup> During the Vietnam War, the People's Army of Vietnam – the North Vietnamese Regular Army – synchronized its operations with the Viet Cong which was an irregular force in order to sustain a lengthy conflict against the superior conventional forces of two separate first world nations - France and the United States of America.<sup>12</sup> The non-state actor in the 2006 Israeli-Hezbollah War, Lebanese Hezbollah, combined the aspects of conventional and unconventional war to fight against the premier conventional military power in the Middle East, the Israeli Defense Forces.<sup>13</sup> In each of these historical cases, trends emerge which, arguably, suggest why and how hybrid forces exist – enabling observers and analysts to anticipate the manifestation of hybrid threats in the future.

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<sup>8</sup> As discussed in the literature review, the term “hybrid threat” emerged in US Defense circles following the 2006 Israel-Lebanese Hezbollah War.

<sup>9</sup> Fulvio Poli: *An Asymmetrical Symmetry: How Convention Has Become Innovative Military Thought* (master's thesis, US Army War College, 2010) 2.

<sup>10</sup> Phillipe Gennequin, *The Centurions versus The Hydra: French Counterinsurgency in The Peninsular War (1808-1812)* (master's thesis, US Army Command and General Staff College, 2011) 10.

<sup>11</sup> Matt M. Matthews, *We Were Caught Unprepared: The 2006 Hezbollah-Israeli War* (Fort Leavenworth, KS: Combat Studies Institute Press, 2008), 20.

<sup>12</sup> Frank Hoffman, *Conflict in the 21st Century: The Rise of Hybrid Wars* (Arlington, VA: Potomac Institute for Policy Studies, 2007). 4

<sup>13</sup> Matthews 2008, 20.

Regardless of the plentitude of historical examples, a persistent obstacle to understanding the hybrid threat has been a seeming inability to classify what a hybrid threat is and why a hybrid threat coalesces in the first place. The conflicting definitions for this age-old construct have stymied the ability of military theorists and planners to envision properly a common set of hybrid threat motivations and potential actions.<sup>14</sup> Fundamentally, the problem is the gap that exists between the cognitive logic of “definition” and the uniqueness of each context in which “hybrid” manifests itself. No definition can be adequate to multiple contexts that differ in time, space and logic. This indicates the need for a theory suggesting principles that shed light on the nature and manifestation of hybrid organizations in hybrid conflicts.

This problem of the shortcomings in current thinking about hybrid threats is particularly relevant now in a time of emerging non-state actors and changing state actor dynamics in the Middle East, Africa, and the Pacific. The exponential increases in the availability of information and communication technology and the proliferation of military tactics and weaponry enhance an already strong tendency for Western militaries to substitute information for understanding as well as identify technical solutions to discrete military problems. So this dearth of insight into the nature and potentialities of hybrid conflict becomes even more problematic and dangerous. General George Casey, former Chief of Staff of the Army, highlighted the importance to the US military of understanding hybrid threats when he stated that in the future the US Army must “prevail in protracted counterinsurgency campaigns; engage to help other nations build capacity and assure friends and allies; support civil authorities at home and abroad; [and] deter and defeat

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<sup>14</sup> This typically leads to the dismissal or irrelevance of certain elements in a conflict which may actually have an enormous effect – but don’t fit into a definition or understanding.

hybrid threats and hostile state actors.”<sup>15</sup> Casey’s comment was reinforced by the February 2011 version of the United States Army *Field Manual 3.0: Operations* which stated that:

The future operational environment will be characterized by hybrid threats: combinations of regular, irregular, terrorist, and criminal groups who decentralize and syndicate against us and who possess capabilities previously monopolized by nation states. These hybrid threats create a more competitive security environment, and it is for these threats we must prepare.<sup>16</sup>

As a result, from the Army Chief of Staff’s broad mandate to deter and defeat hybrid threats came the slightly more refined United States Army doctrinal response in the Unified Land Operations manual to use varying techniques to meet the different aspects of the hybrid threat. Specifically, the doctrine advises the utilization of “wide area security techniques in population-centric Counter-Insurgency operations [to] confront the unconventional portion of the Hybrid Threat, while [using] combined arms maneuver techniques [to] confront and defeat the conventional portions of the Hybrid Threat.”<sup>17</sup> Although this doctrinal approach offers a *way of responding* to hybrid threats, this prescription does not facilitate any understanding of the nature of the threat or a reference for anticipating contextually unique hybrid organizations – only a theoretical approach will enable this understanding and provide the potential for a relevant response. Therefore, in order to enable a more effective, useful method of responding to this identified threat a theory of hybrid warfare are proposed within this monograph.

The comprehensive analysis of historical examples of hybrid conflict indicates that certain enduring principles of hybrid organizations and hybrid warfare exist. For example, under close observation repetitive patterns of institutional motivation and tactical application emerge. Elucidation of these repetitive patterns may then offer insight into the underlying logic in a

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<sup>15</sup> George W. Casey, *The Army of the 21st Century*. Washington, DC: Army Magazine 59 (10), October 2009.

<sup>16</sup>Headquarters, Department of the Army, *Army Field Manual 3-0: Operations* (Washington, DC: Department of the Army, 2011), 14.

<sup>17</sup>ADP 3-0, 2011, 4.

system of hybrid warfare and allow for the formulation of a theory. Such theory, then, could explain the logic of these repetitive patterns and in doing so enable political and military practitioners to anticipate the manifestation and nature of future hybrid behaviors.

Historical analysis, taken together with military professionals' and analysts' predictions, indicate that hybrid organizations will likely comprise the preponderance of future challenges the United States military will face. Therefore, developing a theory of hybrid warfare and an understanding of the components of the hybrid threat will facilitates the training and development of future strategies against these potential threats in the future – from both the conventional and unconventional viewpoint of military force.<sup>18</sup> Understanding how a hybrid military force would likely form and operate in a given environment will offer clear insight into the effectiveness of elements of this strategy. This understanding could then enable the internal optimization of the United States military regular and special operations forces in terms of equipping and training. A theory would also assist in both the strategic and operational application of military force by the United States government and in the refined application of operational art by military leaders against these potential hybrid threats in context.

## **The Lack of Consensual Understanding: A Review of Existing Hybrid Warfare Thinking and Doctrine**

A watershed moment came in the 2006 QDR when its authors formally recognized the existence of hybrid type threat – the ideas represented in the volume constituted a paradigm shift. This newly emergent thinking was closely following by Frank Hoffman's work on hybrid organizations. Although Western defense establishments – primarily in the United States, the United Kingdom, and Israel – recognized both of these conceptual events their thoughts did not represent a consensus in understanding. They assigned many definitions to hybrid scenarios, and

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<sup>18</sup> Hoffman 2007, 1-72.

provided as many descriptions of them, but each scenario was uniquely tied to both the perspective of the author and the specific milieu of the hybrid organization. As a result, no one single definition or description could be universally applied, or was universally relevant, to any and all potential hybrid scenarios. As a result each scenario required some manipulation in order to fit the model. This lack of consensus and understanding constrained the ability of military professionals in the application of operational art in hybrid situations. This review highlights the evolution and the breadth of the discussion of hybrid warfare to propose a theory that enables the required understanding.

A review of the literature that addresses the fusion of conventional and unconventional warfare and the emergence of the idea of hybrid warfare begin to present principles that can inform a theory of hybrid war. Perhaps one of the useful ways to discuss this emergent theory is to capture it as a point on the evolutionary spectrum of theories of warfare. Based on literature as diverse as western military theory, historical narratives, and national policy statements, this monograph defines war as an organized conflict carried on between armed states, nations, or other parties over a certain period in order achieve a desired political/ideological end state.<sup>19</sup> According to existing theories of modern warfare, war can then be broken into the categories of conventional and unconventional warfare. Historically, theorists may then further analyze warfare as an evolutionary process not only defined by both technology and the employment of forces, but also by social pressures. The dual understanding of warfare as both an evolutionary process and as an activity with many forms sets the stage for greater understanding of hybrid warfare as a sum of many evolving parts whose optimized synergy make hybrid organizations much more than this sum total of form.

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<sup>19</sup> Retrieved from <http://www.merriam-webster.com/netdict.htm> on 5 APR 2012.

This review presents the existing literature focused on hybrid warfare as it developed chronologically in order to demonstrate the steady evolution of the accepted ideas about modern warfare. Following a discussion of existing military theory relevant to thinking about hybrid organizations in relation to war, the monograph will examine existing military doctrine that has emerged because of the hybrid warfare dialogue. This close examination of the evolution of the existing thinking and the resultant military doctrine relevant to hybrid conflict will serve to highlight how the idea and the premise of application work together – and to identify potential gaps between the theory and doctrine that warrant further investigation.

A useful start point on this evolutionary analysis is the generational theory of modern warfare which has been proposed by military theorist Dr. Thomas X. Hammes – COL ret, USMC – in his book, *The Sling and the Stone: On War in the 21<sup>st</sup> Century*.<sup>20</sup> Generally, the generational war concept hinges on transformational military technology and its effects on the tactics, strategy and social effects in a wartime setting. Hammes argued that the first generation of modern warfare was a nation state dominated activity that used the tactics of line and column in close order battle that relied on the technological advantage of rifle and machine gun and which prominent primarily in the 18<sup>th</sup> and early 19<sup>th</sup> century.<sup>21</sup> Thus, the generations of warfare construct began with the establishment of the Treaty of Westphalia that legitimized the inherent rights of nations to maintain and use military force – thereby essentially discriminating between

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<sup>20</sup> Thomas X. Hammes, *The Sling and the Stone: On War, in the 21st Century* (St. Paul, MN: MBI Publishing, 2004), 1-321. In no way does Dr. Hammes literature state that the generations of modern warfare that he observes are the first and only examples of the types of warfare that occur. Rather, he attempts to identify the preponderant trends in warfare. For example, guerilla warfare and information warfare existed millennia ago, but were not the preponderant forms or combinations of modern warfare until a certain time in his generational model.

<sup>21</sup> A good example of first generation warfare is that of the Napoleonic Wars.

state and non-state actors.<sup>22</sup> The second generation of warfare built upon the first by utilizing the tactics of linear fire and movement with a focus on indirect fire via artillery that was prominent in the mid-to-late 19<sup>th</sup> century and early 20<sup>th</sup> century.<sup>23</sup>

Thomas Hammes characterized the third generation of warfare as an emphasis on the tactics of speed, maneuver, and depth to collapse enemy forces by attacking their rear areas, both military and civilian – with the addition of military air forces. This form of warfare was prominent during the 20<sup>th</sup> century.<sup>24</sup> Finally, Hammes proposed a fourth generation of warfare which emerged in the mid to late 20<sup>th</sup> century where state and non-state actors used influencing tactics in addition to military tactics to offset technological capabilities.<sup>25</sup> In this fourth generation of warfare, the ideas of guerilla warfare, insurgency, people’s war, and the long war fit to describe a mode of warfare where conventional military advantages offset by unconventional means of warfare coupled with some unifying thought process that establishes the desired military / political end state. Actors in fourth generation warfare use military influencing operations (MISO) and strategic communications (STRATCOM) in conjunction with the unconventional methods to both prolong the conflict and attrite the conventional force’s political and military support base. As a relevant contribution to theories of modern warfare, Dr. Hammes made a highly useful contribution to theories of modern warfare in that he established commonly

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<sup>22</sup> The historical idea of orderly battle predates the modern timeframe extending back into ancient times with the use of loosely organized armed parties clashing together, followed by the evolving use of the phalanx, sea power, animal domestication, and war machines such as siege engines. Hammes generational narrative best describes modern warfare following the Treaty of Westphalia and using all organizational and tactical precursors. In 4<sup>th</sup> Gen. War, Hammes highlights the loss of a state actor’s monopoly on the organized use of force/violence. This generational construct is heavily influenced by the military theories of Antoine Jomini and Carl von Clausewitz following Napoleon Bonaparte’s campaigns at the turn of the 18<sup>th</sup> century.

<sup>23</sup> An example of second generation warfare is World War I.

<sup>24</sup> Examples of third generation warfare are World War II and the Korean War.

<sup>25</sup> Examples of fourth generation warfare are Vietnam, the Iraq War (2003-2011), and the War in Afghanistan (2001).

accepted ideas regarding the likely type of warfare that occurred in a certain timeframe and identified the logic of combination in the evolution of modern war.

Mr. Thomas Huber also contributed to this conceptual discussion when he coined the phrase “compound warfare” in his discussion of hybrid-like conflict in his book *Compound Warfare: That Fatal Knot*.<sup>26</sup> He defined compound war simply as the simultaneous use of conventional and unconventional forces.<sup>27</sup> Under this rubric, actors use two types of forces separately under a unifying leadership structure to produce complementary advantages. In this construct, regular forces gain tactical and operational benefits from the intelligence, counter-intelligence, speed, logistics support, and defensive nature of irregular forces. In turn, irregular forces reap the benefits of regular force strategic intelligence assets, military logistics structure, and the operational pressure of conventional force operations that force an enemy to operate in a consolidated manner. In essence, the idea of compound warfare builds upon the fourth generation warfare construct to highlight the effectiveness of unconventional forces and to emphasize the complementary nature of regular and irregular forces when they are used in conjunction with each other.<sup>28</sup> However, this idea exists in contrast to the idea of hybrid warfare – which includes conventional, unconventional, criminal, and terrorist aspects. As such, compound warfare exists as a precursor to current thoughts on hybrid warfare and is qualitatively different from hybrid warfare.

The US Department of Defense incorporated the concepts of fourth generation warfare and compound warfare in the *2006 Quadrennial Defense Review (QDR)*.<sup>29</sup> The 2006 QDR

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<sup>26</sup> Thomas Huber, “Compound Warfare: A Conceptual Framework,” in *Compound Warfare: That Fatal Knot*, ed. Thomas M. Huber (Fort Leavenworth, KS: US Army Command and General Staff College Press, 2002) 1-317.

<sup>27</sup> *Ibid.*, 10.

<sup>28</sup> *Ibid.*, 311.

<sup>29</sup> Quadrennial Defense Review, 2006.

espoused the threat categories of irregular, traditional (conventional), catastrophic (high-end / WMD threat), and disruptive (criminal / terrorist) challenges in contrasting the likelihood and impact of potential threats to the United States. A quad chart listed the threat categories in terms of frequency and catastrophic effect, enabling a level of prediction regarding enemy threats for the US Military. This separate identification of threat elements reflected the idea of compound warfare in which different types of forces could co-exist and complement each other on the future battlefield, but it also implied the idea that these categories could hypothetically blur and even fuse together.<sup>30</sup> In doing so, the 2006 QDR opened the door to a spectrum of war that required military planners to think about mixed forces in complex environments – an explicit change from Cold War and Peace Dividend military policies that had laid the essential groundwork for the recognition of hybrid war as a fusion of capabilities. In terms of US defense theories, this action represented a paradigm shift from the Cold War policies that oriented on large scale, symmetrical, state actor threats and Peace Dividend policies that projected limited scope asymmetric threats. In doing so, the Department of Defense formally began a dialogue that would eventually lead to theorizations about hybrid warfare.

Mr. Frank Hoffman continued the theoretical evolution of warfare through the contribution of his ideas about hybrid warfare. Hybrid warfare emerged as a military term in the 2007 US Maritime strategy – describing the convergence of regular and irregular threats using simple and sophisticated technology via decentralized planning/execution.<sup>31</sup> Hoffman built this

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<sup>30</sup> Quadrennial Defense Review, 2006; Nathan Frier, “Hybrid Threats: Describe...Don’t Define,” *Small Wars Journal* (2009): 5. Of note, this author’s conversations with Hybrid Theorist Frank Hoffman (Washington, DC, February 2012) included a conversation on the emergence of this quad chart concept and the idea that the original concept was more oriented towards dashed rather than solid lines separating the chart – enabling threats to move or blend from one category to another. Hybrid threats in particular are best understood if considered from this position of quantified movement.

<sup>31</sup> Headquarters, Department of the Navy, *A Cooperative Strategy for 21<sup>st</sup> Century Seapower* (Washington, DC: Department of the Navy, 2007).

idea by positing hybrid warfare as the synergistic fusion of conventional and unconventional forces in conjunction with terrorism and criminal behavior.<sup>32</sup> This fusion is oriented towards a desired objective through a political narrative, which simultaneously and adaptively unifies all the elements of the force. Additionally, he explained that either a state or a non-state actor at the tactical, operational, or strategic level could conduct this form of warfare.<sup>33</sup> Hoffman's blending effect is the combination; or rather optimization, of not only regular and irregular generational forms of warfare but also the effects of socially disruptive actions of crime and terrorism, and the resultant strategic messaging effect.<sup>34</sup> In essence, Hoffman's ideas of hybrid warfare build upon the construct of compound warfare to include a synergistic fusion of the elements with the inclusion of terrorism and criminal behavior. His revolutionary approach not only introduced the concept of hybrid war, but also enabled a new dialogue between the conventionally and unconventionally oriented portions of the United States defense establishment.<sup>35</sup>

In the terms of hybrid warfare, Frank Hoffman's work from 2006 until the present became the gold standard for understanding the concept of hybrid forces and the synergistic effects that they could produce. Hybrid warfare theorists writing after 2006 – working in the United States, the United Kingdom, or Israel – have used Hoffman's benchmark to orient their work in order to agree, disagree, or attempt to expand on his concepts. However, for our

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<sup>32</sup> Hoffman 2007, 301.

<sup>33</sup> Ibid., 301.

<sup>34</sup> Frank Hoffman, "Hybrid vs. Compound War," *Armed Forces Journal* (2009); Nathan Frier, "Hybrid Threats: Describe...Don't Define," *Small Wars Journal* (2009): 5; and Biddle, Stephen, and Jeffrey A. Friedman. *The 2006 Lebanon Campaign and the Future of Warfare: Implications for Army and Defense Policy*, Carlisle Barracks, PA: Strategic Studies Institute, 2008.

<sup>35</sup> Often times, military forces are divided between two mind-sets – those who see only the conventional threat (or at the least its primacy) and those who see only the unconventional or irregular threat. This is often a matter of institutional placement (e.g. Tank Commanders that train extensively for tank battles versus Special Forces that typically operate in insurgent type situations).

discussion of theory, this work is not sufficient as it is primarily descriptive and does not capture a concise form, function, and logic that explains a hybrid organization that conducts hybrid warfare. A better explanation of hybrid organizations will come from a theory comprised of principles that enable a broad understanding or rationale for hybrid organizations existence. Much of the following professional literature on hybrid warfare builds or contrasts with Hoffman's work.

British military doctrine, in contrast to Hoffman's premise, captures hybrid warfare as an aspect of irregular warfare. No true distinction is made between an irregular or guerilla force and any type of a better equipped force that uses a variation of asymmetric tactics.

Hybrid warfare is conducted by irregular forces that have access to the more sophisticated weapons and systems normally fielded by regular forces. Hybrid warfare may morph and adapt throughout an individual campaign, as circumstances and resources allow. It is anticipated that irregular groups will continue to acquire sophisticated weapons and technologies and that intervention forces will need to confront a variety of threats that have in the past been associated primarily with the regular Armed Forces of states.<sup>36</sup>

As a result, the British do not consider a differing logic regarding the formation or utilization of a hybrid threat – exposing a gap in common understanding between the United States and its closest military ally.

Israeli military theorists describe hybrid threats and hybrid warfare as a method of social warfare which is unbounded by social constraints. Therefore, hybrid threats not only gain a physical advantage through the combination of conventional technology and organization with unconventional tactics and applications; but also gain a cognitive advantage by the very lack of social restrictions that conventional state forces must adhere to such as the Law of Land Warfare, Geneva Convention, and Rules of Engagement. Added to this dual advantage is the idea that

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<sup>36</sup> Ministry of Defense, The United Kingdom Joint Doctrinal Note 2/07 *Countering Irregular Activity Within A Comprehensive Approach* (Shrivenham Defence Academy, Shrivenham, Wiltshire, UK, March 2007).

hybrid forces operate as a networked system that is much quicker than a conventional force in utilizing and responding to popular opinion, its support base, and internal feedback or learning. This orientation towards systems thinking renders the placement of hybrid warfare on an evolutionary scale irrelevant because it only requires a cognitive basis rather than a material one normally ascribed to either a conventional or an unconventional military force. The Israeli view also points towards an effects based understanding of the hybrid threat versus a functionally based understanding – which leads to a universal vice a tailored approach in responding to hybrid warfare. As a result, the Israeli description ultimately disagrees with US points of view by focusing more on the synergy of hybrid components – to include the cognitive – in producing a military effect rather than on the differences in functional capability within the hybrid force itself.<sup>37</sup> This disagreement allows a useful counterpoint in the dialogue and again questions the utility and accuracy of a description, or definition, of hybrid warfare – pointing to a need for an understanding of the logic or theoretical nature of hybrid warfare rather than an overarching description that fails to transition from one case study to another.<sup>38</sup>

Hoffman’s ideas about hybrid warfare gained traction within the US defense community and several other military theorists expounded upon these ideas. COL Jeffrey Cowan continues the discussion in his monograph *A Full Spectrum Air Force* in which he outlines the spectrum of conflict as envisioned by the defense analyst Shawn Brimley.<sup>39</sup> Brimley’s model includes low-end insurgent tactics and limited technology on one end and large conventional armies with high-

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<sup>37</sup> Author’s discussion with retired IDF Generals and current Israeli military theorists in Tel Aviv, Israel, March 2012.

<sup>38</sup> *Hybrid Warfare*, Global Accountability Office, 10 September 2010. As discussed in previous footnotes, there is no universal consensus on either the existence of hybrid warfare or on its definition – this contention is global, not simply focusing on US theorists, but extending through the UK, Israel, and beyond.

<sup>39</sup> Jeffrey L. Cowan, *A Full Spectrum Air Force* (master’s thesis, Air War College, 2009) and Shawn Brimley; *Crafting Strategy in an Age of Transition* (Carlisle Barracks, PA: Parameters, US Army War College Press, 2009), 28.

level technology such as nuclear weapons, bombers, and aircraft carriers on the other end. In this model, modern conventional militaries attempt to cover the middle and higher end of the spectrum to guard against “most likely threats.”<sup>40</sup> In the case of the United States military, the preponderance of the military forces straddle the middle portion of the model and technological applications are used to control the higher end capabilities such as Intelligence, Surveillance, and Reconnaissance (ISR) platforms and paired high-end technology such as nuclear weapons and precision strike capabilities.

Cowan explains the model in terms of hybrid warfare by arguing that the pressures of the globalization allow potential hybrid threats to gain access to conventional military capability that normally resides closer to the middle of the spectrum through the use of global finance and the available proliferation of information and technology. Examples include air defense systems such as the Rocket Propelled Grenade -7 (RPG-7) and the Kornet Anti-tank Missile (9M133) – both used by Lebanese Hezbollah in the 2006 War against Israeli Defense Forces.<sup>41</sup> He then explains that the globalization and the proliferation of Weapons of Mass Destruction (WMD) technology – defined as nuclear, biological, chemical, radiological, and high explosive – have bent high end of the spectrum towards the middle as non-state actors such as terrorists and hybrid threats compete with some 2<sup>nd</sup> and 3<sup>rd</sup> world nations to gain access to this end of the spectrum through the use of money and acquisition of available means such as technical knowledge and equipment. This idea is useful toward helping to explain the existence of hybrid warfare because of the dual pressures of globalization pressure and technological/information availability that have allowed low-end opponents to access both ends of the spectrum and to ignore the costly middle section. As a result, hybrid threats can potentially use depth to engage in conflict at almost any point on the

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<sup>40</sup> Ibid., 28.

<sup>41</sup> Matthews 2008, 1-96.

spectrum. Cowan's assertions are useful to an initial consideration the underlying logic of the hybrid threat and enquiry into the factors that motivate and enable the formations of hybrids.

In his monograph, *Strategic Implications of Hybrid War: A Theory of Victory*, Lt. Col. Daniel Lasica posits that hybrid force actors attempt to combine internal tactical success and information effects regarding enemy mistakes through the deliberate exploitation of the cognitive and moral domains.<sup>42</sup> In this manner, he describes hybrid warfare simultaneously as a strategy and a tactic – because of the blending of conventional, unconventional, criminal, and terrorist means and methods. A hybrid force is thus able to compress the levels of war and thereby accelerate tempo at both the strategic and tactical level – in a method faster than a more conventional actor is able to do. In this theoretical model, the hybrid actor will always gain a perceived strategic advantage over the conventional actor regardless of tactical results.<sup>43</sup> Again, this effort to understand the logic of a hybrid force enables a glimpse of the motivating factors which drive a hybrid threat and how it forms.

David Sadowski and Jeff Becker, in their article *Beyond the "Hybrid" Threat: Asserting the Essential Unity of Warfare*, expand the discussion by decrying the "quad-chart approach" which put each type of threat category in its own simple, separate "box."<sup>44</sup> They assert, in contrast to Brimley, that the idea of simply seeing hybrid warfare as a combination of threat

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<sup>42</sup> Daniel T. Lasica, *Strategic Implications of Hybrid War: A Theory of Victory* (master's thesis, School of Advanced Military Studies, 2009), 1-62.

<sup>43</sup> In the context of the 2006 War, Lebanese Hezbollah (LH) is defeated at the tactical level, arguably losing the majority of its tactical engagements with the IDF, however in a strategic sense LH is seen to have emerged from the conflict as a victor. Although this perception is adroitly put forward by LH information type operations, there is a ring of truth in the sentiment – gaining even IDF agreement as to LH's strategic victory. Discussions with US and IDF military analysts confirm this finding – although in retrospect, each notes that a type of "mutual" deterrence was effected following the conflict with neither side being willing to unnecessarily return to any type of military confrontation.

<sup>44</sup> David Sadowski and Jeff Becker, "Beyond the "Hybrid" Threat: Asserting the Essential Unity of Warfare," *Small Wars Journal* January 7, 2010, 1-13.

categories or capabilities fails to appreciate the complexity of the hybrid approach to warfare.<sup>45</sup> Rather, they argue that the essential aspect of hybrid warfare is the underlying unity of cognitive and material approach in generating effects. Such a unity of cognitive and material domains allow for flexibility in a strategic context in which social “rules” can be redefined in an iterative process to the hybrid’s advantage in terms of legality and military norms.<sup>46</sup> The resulting flexibility facilitates iterative adaptation that allows the hybrid to quickly take advantage of opportunities – both in terms of material equipping and in terms of cognitively influencing the environment. This combination of the cognitive and material domains in understanding is important in that it bridges the gap between US and Israeli ideas – and served to expand the existing conceptions of hybrid warfare.

The *2010 Quadrennial Defense Review (QDR)* follows these ideas by expressing hybrid warfare as:

the seemingly increased complexity of war, the multiplicity of actors involved, and the blurring between traditional categories of conflict. While the existence of innovative adversaries is not new, today’s hybrid approaches demand that U.S. forces prepare for a range of conflicts. These may involve state adversaries that employ protracted forms of warfare, possibly using proxy forces to coerce and intimidate, or non-state actors using operational concepts and high-end capabilities traditionally associated with states.<sup>47</sup>

The review continues with a discussion of the multiple challenges and complex combinations of approaches and capabilities that will likely emerge from a hybrid threat. It then directs that US forces must tailor themselves to react flexibly across a varied range of potential conflicts. As a formal strategic document, the QDR not only offers a mandate to explore the potentials of a

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<sup>45</sup> *2010 Quadrennial Defense Review*, February 2010 and Michelle Flournoy, *Contested Commons: The Future of American Power in a Multipolar World* (Washington, DC – Center for a New American Security, 2010).

<sup>46</sup> These social rules exist to constrain both the conceptual and the material understanding of a situation and any resulting action that takes place within a system.

<sup>47</sup> *2010 Quadrennial Defense Review*, February 2010, 8, 15.

hybrid threat, but in directing a response from the military force – the QDR makes understanding the logic of a hybrid threat an imperative.

Defense theorists then couple the strategic QDR language with the *United States Army Capstone Doctrine for 2009–2025*, which attempts to translate and outline the future threats that the United States military will face in this period. The Capstone Doctrine paints a threat picture in which “Army forces must be prepared to defeat what some have described as hybrid enemies: both hostile states and non-state enemies that combine a broad range of weapons capabilities and regular, irregular, and terrorist tactics; and continuously adapt to avoid U.S. strengths and attack what they perceive as weaknesses.”<sup>48</sup> This functional language endeavors to create a functional definition that users can then capture within operational and tactical doctrine that US Army ground forces can employ. This offers some benefit in adding to the discourse a formal definition of hybrid threats. However, an understanding of the underlying logic is still missing – ultimately requiring a predictive theory that sets out principles that can act as a guide to explain the behavior of hybrid actors.

The military doctrine resulting from this strategic conception of hybrid organizations, *US Army Field Manual 5-0: The Operations Process*, defines a hybrid threat as dynamic combinations of conventional, irregular, terrorist, and criminal capabilities adapting to counter traditional advantages.<sup>49</sup> *US Army Field Manual 3-0: Operations* then describes hybrid threats functionally as “a diverse and dynamic combination of regular forces, irregular forces, criminal elements, or a combination of these forces and elements all unified to achieve mutually benefitting effects. Such forces combine their abilities to use and transition between regular and

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<sup>48</sup> Headquarters, Department of the Army, *Army CAPSTONE Concept 525-3-0* (Washington, DC: Department of the Army, 2009), 15, 47.

<sup>49</sup> Headquarters, Department of the Army, *The Operations Process 5-0* (Washington, DC: Department of the Army, 2008), 3, 4.

irregular tactics and weapons.”<sup>50</sup> FM 3-0 also says, “These forces may cooperate in the context of pursuing their own organizational objectives. Hybrid threats may use the media, technology, and their position within a state’s political, military, and social infrastructures to their advantage. Hybrid threats creatively adapt, combining sophisticated weapons, command and control, cyber activities, and combined arms tactics to engage U.S. forces when conditions are favorable.”<sup>51</sup> As functional definitions, these documents describe a hybrid threat as a mix of military capabilities, but do not facilitate any comprehension of an underlying logic that drives a hybrid forces to manifest in a certain way. In this manner, the FM describes the symptoms of the threat, but the disease remains a mystery. As such, this monograph attempts to remedy this situation by providing a theory of hybrid warfare that will enable prediction of hybrid behavior.

### **A Theory of Hybrid War: New Ways of Explaining Hybrid Behavior**

What follows is a proposed theory of hybrid warfare. Such a theory will provide for the elucidation of the formation and behavior of hybrid organizations. The principles which serve as the architecture of this theory will also be derived from historical trends. The resulting theory will then be explored and validated through an analysis of two case studies which represent examples of hybrid warfare. This logic will be shown through several principals derived from historical trends. The monograph then explores and validates the resulting theory through analysis of two hybrid warfare case studies.

Following the review of available military theories on the different forms of warfare, it is appropriate to return to one of the most respected military theorists on war to construct a theory

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<sup>50</sup> Headquarters, Department of the Army, *Operations 3-0* (Washington, DC: Department of the Army, 2011), 1-5.

<sup>51</sup> *Ibid.* 1-23 For example, criminal elements may steal parts for a profit while at the same time compromising the readiness of an adversary’s combat systems. Militia forces may defend their town with exceptional vigor as a part of a complex defensive network. Additionally, hybrid threats use global networks to influence perceptions of the conflict and shape global opinion.

of hybrid warfare. Clausewitz defined war as “...an act of force to compel our enemy to do our will.”<sup>52</sup> He theorized that the ultimate expression of war is “ideal” or “absolute” war where all available resources and assets are applied to achieve the desired end state of the war. However, Clausewitz stated that this ultimate expression of war would often be counter to the desired political ends of a war thereby making it unrealistic, so he outlined the concept of “limited war” in which militaries optimize available means to meet limited political goals. As a result, the generalized categories of “ideal” or total war, “limited war,” and military operations that occur underneath a level of declared war have come to be accepted generalizations regarding warfare. This idea of “limited war” with its inherent ideas of social constraint and thresholds of military potential has the most contemporary significance in the construction and employment of military organizations.<sup>53</sup>

In war, a state actor will generally match available means – defined by a portion of gross domestic product matched to technological capability – to projected political end-states – contingency requirements planned against potential adversaries in a multitude of contexts. As a result, the typical military organization will be optimized for a broad range of potential scenarios based on likely political temperament. In a large, resource rich country such as the United States, China or Russia this results in a broad force which is prepared for offense, defense, and stability type operations across a varying scale. In reality, this “optimized” force is not prepared for a

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<sup>52</sup> Carl von Clausewitz, *On War*, trans. and ed. Michael Howard and Peter Paret (Princeton, NJ: Princeton University Press, 1976), 24–25, 65–67;

<sup>53</sup> Specifically, the idea of limited war refers to the historical observation that war as a social construct is self-regulating to a certain degree. It requires the acquiescence of its participants and supporters to escalate from one level to another and as such will meet certain thresholds of either military capability or resource availability. These thresholds will in effect limit the scope of the war. Most state actors or non-state actors will recognize some of these thresholds and attempt to optimize their behavior and organizations within these constraints (laws, budgets, popular support, international opinions, etc).

specific employment context, but rather optimizes to best meet a broad array of scenarios for employment – resulting in less optimization for a unique context.

However, not all military organizations develop or are employed in this manner. Nations constrained by a lack of resources or technological capability must make decisions as to the breadth and depth of their “optimization.” This practice can then lead to a number of variations in military organization from broad, flat armies of primarily light infantry designed for specific functions such as population control and internal regime survival, to small or medium sized forces with combined arms depth to confront specific external threats such as tanks, missiles, and aircraft. Generally, these less resourced organizations will conform to a conventional model of a large full spectrum military on a smaller scale as in the example of the 1973 era Egyptian Army based on a Soviet-type organizational model.<sup>54</sup>

In some cases, organizations will develop optimized military structures outside of conventional models. These unconventional structures will be optimized to a specific, contextual purpose but utilize resources and capabilities that are not contained in a conventional military force. Observers often refer to these unconventional organizations as asymmetric or hybrid threats that offer certain advantages to automatically alter the battlefield calculus when confronting a more conventional force. These observers then often refer to the resulting conflict as hybrid war. In other words, a hybrid war can best be described as an optimized form of warfare that allows a combatant to attempt to utilize all available resources – both conventional and

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<sup>54</sup> George W. Gawrych, *The 1973 Arab-Israeli War: The Albatross of Decisive Victory* (Fort Leavenworth, KS: Combat Studies Institute Press, 1996). In the buildup to the 1973 Arab-Israeli War, Egypt was able to look at Israel previous air and land power success and was able to optimize the Egyptian Army and its war plan for the 1973 war. In doing so, the Egyptians maximized their anti-tank and anti-air capabilities using Soviet supplied arms and then operationalized that capability in limited advances under the protection of these weapon systems. The result was shocking to the military world in that the relatively advanced Israeli Defense Force was beaten by the sub-par Egyptian Army that the Israelis had resoundingly beaten in 1967.

unconventional – in a unique cultural context to produce specific effects against a conventional opponent.

In order to begin to understand hybrid warfare it is necessary to engage in a deeper enquiry into the reasons a hybrid force forms, or is formed. Logic would seem to indicate that a hybrid force is formed to generate specific effects upon a battlefield or directly on an enemy combatant. The formation of this force would be constrained by both the available means at its disposal and envisioned in ways that those means could be applied to achieve desired ends<sup>55</sup>. For the hybrid force, this process of formation is different from conventional and irregular warfare in that the constraints and motivations that drive the hybrid force do so with a unique logic – as explained in the theories principles. Historically, the hybrid formation process has resulted in several commonalities in terms of composition and effects, which in turn can be generalized into seven principles to describe hybrid war in its totality.

The first principle of hybrid war proposed here is that a hybrid force's composition, capabilities, and effects are unique to the force's own specific context. This context relates to the temporal, geographic, socio-cultural, and historical setting in which the given conflict take place.

The second principle is that there exists a specific ideology within the hybrid force that creates an internal narrative to the organization. This ideology is inherently linked to the strategic context and is grounded within the socio-cultural, religious identity of the hybrid force. The resulting narrative serves to redefine the extant rules within the strategic context.

The third principle is that a hybrid force perceives an existential threat by a potential adversary. This perceived threat drives the hybrid force to abandon conventional military wisdom to achieve long-term survival.

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<sup>55</sup> The desired ends of a hybrid organization are often political in nature – relating to the popular motivations both within the organization itself and in the populace that exists around the hybrid organization.

The fourth principle is that a capability overmatch between the hybrid force and a potential adversary exists. The hybrid force contains less conventional military capability in comparison to its adversary and therefore must seek a way to offset this apparent advantage in military capability.

The fifth principle is that a hybrid force contains both conventional and unconventional elements. These elements often comprise “accepted” military technology and non-military, guerrilla type technology. The elements may also include the use of terrorist or other criminal tactics. These combined capabilities create an asymmetric advantage for the hybrid force.

The sixth principle proposes that hybrid organizations rely on inherently defensive type operations. The hybrid force seeks to defend its existence and employs an overall strategy of defensive operations. These operations will often include offensive components, but the overarching intent is still one of defense.

The seventh principle is that hybrid organizations use attritional tactics in the employment of the hybrid force. These tactics manifest in both the physical and the cognitive domains in order to continually whittle away the adversary’s forces and his will to use them.

Therefore, hybrid war theory may be best summarized as a form of warfare in which one of the combatants bases its optimized force structure on the combination of all available resources – both conventional and unconventional – in a unique cultural context to produce specific, synergistic effects against a conventionally-based opponent.

## **Analysis Methodology**

What follows is a historical analysis of selected case studies that is both qualitative and deductive. This analysis will provide additional insights that will contribute to the development and refinement of the theory of hybrid warfare proposed in this work. The case studies explored are Lebanese Hezbollah in the 2006 Israel-Hezbollah War and the Russia and the Soviet partisan network during World War II on the Eastern Front from 1941 to 1945. The Lebanese Hezbollah

case study is the original instance of hybrid warfare and as such has served as ground zero for much of the work on hybrid warfare and hybrid organizations. The Soviet Partisan Network case study is a historical example of hybrid warfare that has not been analyzed in detail – this review will serve to offer an untouched example of hybrid warfare to be explored by the proposed theory to determine the universal applicability of its principles. This process offers supporting evidence via concrete example of each of the proposed principles that support the theory. As a result, the theory of hybrid warfare will be not only validated, but will also be shown to be broadly applicable in historical analysis.

## **The Israel-Hezbollah War (2006) – A Well-Trod Example Revisited**

Following the review of literature on evolving modern warfare and the existence of hybrid warfare as a component of modern conflicts, this monograph now conducts a qualitative and deductive analysis of historical case studies to explore and validate the proposed theory of hybrid warfare. In doing so, it attempts to parse examples of each principle to show its existence within the historical context of the case study. The monograph first examines Lebanese-Hezbollah as the prototypical hybrid organization during its conflict with Israel in the summer of 2006. As the analysis will show, Lebanese Hezbollah functions as a hybrid organization and as a result manifests multiple synergistic advantages in relation to its opponent. In teasing out the motivations for these functional behaviors, Lebanese Hezbollah validates each the proposed theory by demonstrating the qualitative presence of each of the principles. The summary at the end of this chapter provides a holistic synthesis by showing the relevance of the hybrid actor within the historical context.

### **Strategic Context of the Israel-Hezbollah War**

To understand the depth of this conflict, we will first review the strategic context of the situation so that understanding may be gained when looking for the presence of the proposed

theory and principles. The Israel-Hezbollah War of 2006 was a thirty-four day military conflict, which pitted the pre-eminent conventional military force in the Middle East – Israel – against the combined conventional and unconventional military force of the non-state actor Lebanese-Hezbollah. The conflict began when Lebanese-Hezbollah conducted attacks against Israeli border forces and kidnapped two Israeli soldiers on 12 July 2006. Israel responded with a failed rescue attempt and a synchronized air and ground bombardment of Southern Lebanon, followed by a ground invasion and a naval blockade of Lebanon. Lebanese Hezbollah retaliated with massive rocket strikes into Northern Israel and a guerilla campaign utilizing prepared, hardened defensive positions. Fighting continued until regional and international pressure resulted in a United Nations brokered ceasefire on 14 August 2006.<sup>56</sup>

In total, the fighting resulted in the deaths of approximately 1200 people. The fighting displaced over a million people in Southern Lebanon and in Northern Israel. On the Israeli side, 114 Israeli Defense Force soldiers were killed and significant amounts of Israeli military equipment were damaged or destroyed, including up to 10 percent of Israel's committed main battle tanks, and some rotary wing aircraft and coastal naval vessels were severely damaged.<sup>57</sup> More than 40 Israeli civilians were killed and nearly 4000 were injured in addition to an estimated \$3.5 billion loss in war cost and economic output.<sup>58</sup> In Lebanon, Lebanese Hezbollah suffered contentious losses of between 46 and 600 fighters killed and its observed military capability was estimated to have been reduced by one half.<sup>59</sup> In addition, over 1000 Lebanese

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<sup>56</sup> Matthews 2008, 1-96.

<sup>57</sup> Ibid., 20.

<sup>58</sup> Harel Amos and Avi Issacharoff, *34 Days: Israel, Hezbollah, and the War in Lebanon*. (New York: Palgrave Macmillan, 2008.), 1-304.

<sup>59</sup> Ibid., 1-304; Matthews 2008, 29.

civilians were reportedly killed and over 4000 were injured in addition to an estimated \$4 billion loss in buildings and infrastructure.<sup>60</sup>

The conflict played out against a historical backdrop of political, religious, and ethnic tensions between the strong state actor, Israel, and the ambiguous non-state actor, Lebanese-Hezbollah within the neighboring weak state of Lebanon. Israel is a strong, Jewish state in a contested geographic area, which has historically fought for survival against the Arab and Muslim populations of the Middle East. Israel generally comprises a dominant Jewish demographic and is supported by both a strong internal economy and by external remittances and patronage.<sup>61</sup> Israel's military industrial complex is the most advanced within the Middle East region, fielding advanced ground, air, and sea platforms, making it a powerful conventional military force capable of both internal and external defense on multiple fronts.

Lebanon is a weak, multicultural state, which has been a confluence of both Mediterranean and Middle Eastern peoples and beliefs for centuries. This cultural milieu has resulted in a demographic mix that tentatively balances between multiple Muslim and Christian factions within the population.<sup>62</sup> As a result, Lebanon has a relatively weak central government and with control distributed among many factions according to the 1926 Lebanon Constitution. During the civil war of 1975-1990, this balance of power was contested. Following the 1979

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<sup>60</sup> Uri Bar-Joseph, "The Hubris of Initial Victory: The IDF and the Second Lebanon War," in *Israel and Hizbollah*, ed. Clive Jones and Sergio Catignani, (London: Routledge, 2010), 156-159.

<sup>61</sup> Retrieved from <https://www.cia.gov/library/publications/the-world-factbook/geos/is.html> on 5 APR 2012. The CIA World Factbook list Israel's population demographics as 76% Jewish, 20% Arab – although almost all policy is Jewish.

<sup>62</sup> Retrieved from <https://www.cia.gov/library/publications/the-world-factbook/geos/le.html> on 5 APR 2012. In large part due to the nature of its weak central government, the preservation of the 1932 census and its resulting balance of power is preferred by most of Lebanon's population. For this reason, any changes in population demographics (primarily from Christian to Muslim majorities) are masked to maintain the historical partitioning of government positions between the population demographics. As a consequence, the central government remains weak and highly partisan.

Iranian Islamic Revolution, additional pressure was placed on the balance of power via the Shia demographic. This in turn has led to external interference and sometimes domination of Lebanon by her stronger neighbors, Syria and Israel – perpetuating the cycle of a lack of control and resulting in historically poor infrastructure. The weak governmental structure is mirrored by a relatively weak military that lacks not only the power to conduct external defense but also to impose or support internal order – effectively creating an internal power vacuum. Lebanese Hezbollah filled the power vacuum created by this lack of internal political and military strength in the early 1980's.<sup>63</sup>

Lebanese Hezbollah is a strong militia with political aspirations, founded in 1982 in response to Israeli actions in Lebanon. The group, backed by both Iran and Syria, quickly emerged as both a legitimate political entity and as a credible military force.<sup>64</sup> Although not possessed of internal means of generating large-scale military power, Lebanese Hezbollah has continuously received equipment, training, and funding from its anti-Israeli allies – Iran and Syria. As the group's military prowess matured over time, it gained significant conventional capabilities in terms of rockets, artillery, anti-aircraft, anti-ship, and anti-tank weaponry. This conventional capability is augmented by an asymmetric capability including criminal/terrorist activities and networks.<sup>65</sup> As a result, the unique picture of Lebanese Hezbollah is built to show its attributes as a hybrid organization.

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<sup>63</sup> Ahmed Nizar Hamzeh, *In The Path of Hizbullah*. (Syracuse, NY: The Syracuse University Press, 2004), 43.

<sup>64</sup> Penny L. Mellies, "Hamis and Hezbollah: A Comparison of Tactics." *In Back to Basics: A Study of the Second Lebanon War and Operation CAST LEAD*, edited by Scott C. Farquhar (Fort Leavenworth, KS: Combat Studies Institute Press, 2009), 1-146.

<sup>65</sup> Matthews 2008, 1-96.

## Hybrid Principles in Detail

When analyzed as a hybrid force, Lebanese Hezbollah displays several strong characteristics within the context of the Israeli-Hezbollah 2006 War.

The first principle of hybrid war is that a hybrid force's composition, capabilities, and effects are unique to the force's own specific context. This context includes the temporal, geographic, socio-cultural, and historical setting in which the given conflict take place. Lebanese Hezbollah exists within just such a specific enabling context. The weak central government and conflicted lines of power within the country allow Lebanese Hezbollah to exist peaceably and to easily maintain and improve its militant status and freedom of action. Lebanon itself is not only a cultural and demographic mix of Eastern and Western society, but it also rests within the arc of a large Shia Muslim demographic density that extends from Lebanon thru Syria, Iraq, Iran, and Bahrain – otherwise known as the “Shia Crescent”.<sup>66</sup> The “Shia Crescent” serves to unify Lebanon's internal Shia Muslim population allowing Lebanese Hezbollah a solid base of support – and then extends this support base through to its external sponsors, Syria and Iran. In addition, the ideology espoused by Lebanese Hezbollah extends to the Lebanese diaspora throughout the world and engenders both sympathy and support for the organization.<sup>67</sup>

The second principle of hybrid posits that a specific ideology exists within the hybrid force that creates an internal narrative to the organization. This ideology inherently links to the strategic context and is grounded within the socio-cultural, religious identity of the hybrid force. The resulting narrative redefines the extant rules within the strategic context. Lebanese Hezbollah maintains an ideology of righteous Islamic Revolution grounded in both its assumed role as an

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<sup>66</sup> Ibid., 15-18.

<sup>67</sup> Amos and Issacharoff 2008, 76-121.

anti-Israeli militia and as a Shia protector in Lebanon.<sup>68</sup> This narrative supports both the external and internal support relationships as well as facilitating the growth and control requirements of Lebanese Hezbollah as a dominant non-state actor within Lebanon.

The third principle of hybrid warfare is the hybrid force's perception of an existential threat by a potential adversary. This perceived threat drives the hybrid force to abandon conventional military wisdom in order to find ways to achieve long-term survival. In the case of Lebanese Hezbollah, Israel established a long historical precedent of military action and occupation in Lebanon in 1948 during the Arab-Israeli War with the Israeli occupation of numerous southern border villages in Lebanon.<sup>69</sup> The invasion of southern Lebanon followed in 1978 and occupation of territory south of the Litani River.<sup>70</sup> In 1982, a large Israeli ground force briefly entered the eastern portion of Beirut, the capital of Lebanon.<sup>71</sup> The Lebanese people and Lebanese Hezbollah can see Israel as an existential threat if it combines selected historical facts with Israeli policy statements. Moreover, Lebanese Hezbollah could go so far as to identify an Israeli threat to the Lebanese population writ large. In fact, Lebanese Hezbollah's vibrant public rhetoric regularly incorporates this understanding.<sup>72</sup> The realization of this existential threat thereby prompts Lebanese Hezbollah to seek any method possible to defend itself – including both conventional and unconventional methods. Another result of this rhetoric and understanding is the tacit approval of the approval of the Lebanese people – which creates a support base that

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<sup>68</sup> Mellies, 2009.

<sup>69</sup> Daniel Isaac Helmer, *Flipside of the COIN: Israel's Lebanese Incursion Between 1982-2000*. (Fort Leavenworth, KS: Combat Studies Institute Press, 2007), 1-85.

<sup>70</sup> *Ibid.*, 64.

<sup>71</sup> Amos and Issacharoff 2008, 76-121.

<sup>72</sup> Retrieved from <http://www.state.gov/r/pa/ei/bgn/35833.htm> on 5 April 2012. Outlines ISR policy statements – many of which espouse the destruction of Hezbollah and any other threat to Israeli security. These policies are available to the public domain and are often published in both Israeli and Lebanese periodicals.

enables the actions of Lebanese Hezbollah; including the unconventional, terrorist, and criminal activities that support the organization.

Principle four posits that in a hybrid war there exists a capability overmatch between the hybrid force and a potential adversary. The hybrid force contains less conventional military capability compared to its adversary and therefore must seek a way to offset this apparent advantage in military capability. In the case of Lebanese Hezbollah and Israel, this overmatch is readily apparent. Israel not only maintains a large internal military industrial complex, but also links through close alliances to both the American and European military industrial complexes – thereby being capable of maintaining a relatively large conventional army.<sup>73</sup> Lebanese Hezbollah on the other hand, maintains an ad-hoc militia force that is reliant on external arms supplies and unconventional techniques to achieve military effects.<sup>74</sup>

The fifth principle says that a hybrid force contains both conventional and unconventional elements. These elements often comprise “accepted” military technology and non-military, guerrilla type technology and tactical application. These combined capabilities create an asymmetric advantage for the hybrid force. In a ground force comparison of the 2006 War, Israel fields an army containing main battle tanks such as the Sabra Mark I and Merkava Mark IV, armored personnel carriers like the Namer, infantry fighting vehicles such as the Golan Armored Vehicle, towed and self-propelled artillery systems like the LAROM and Sholef, and multiple variations of unmanned aerial drones.<sup>75</sup> Additionally, Israel maintains multiple air force strike fighters such as the Kfir and F-16I, rotary wing platforms, and coastal defense ships.<sup>76</sup> Conversely, Lebanese Hezbollah utilizes multiple small arms variants, anti-tank munitions, anti-

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<sup>73</sup> Matthews 2008, 12, 47-56.

<sup>74</sup> Amos and Issacharoff 2008, 47.

<sup>75</sup> Mellies 2009, 1-146.

<sup>76</sup> *Ibid.*, 97.

aircraft systems, anti-ship weapon systems, and multiple rocket and missile platforms.<sup>77</sup> These elements combine in a mixed hierarchical / cellular structure comprised of both conventional fighters and irregular militia. The more conventional fighters are capable of advanced application of their weapon systems, as seen in the example of 3709 rocket attacks launched into Northern Israel – hitting 901 towns and cities during the 34-day conflict.<sup>78</sup> The irregular militia units use Improvised Explosive Devices and are capable of near simultaneous swarming attacks.<sup>79</sup>

Hybrid forces seek to use defensive type operations: This is the sixth principle of hybrid warfare proposed in this work. The hybrid force seeks to defend its existence and will employ an overall strategy of defensive operations. These operations will often include offensive components, but the overarching intent will still be one of defense. In the 2006 Israeli – Lebanese Hezbollah War, Lebanese Hezbollah fought from prepared fighting positions, including fortified bunkers, which were arranged in depth in Southern Lebanon.<sup>80</sup> From these defensive positions, Lebanese Hezbollah launched multiple rocket attacks and executed swarming attacks against Israeli ground forces. As such, these operations primarily focused on the overall survival of Lebanese Hezbollah forces or on the protection of their corresponding local support networks. It is noteworthy that, although Lebanese Hezbollah attempted to defend several village locations, it did not necessarily defend them to the death, but rather would often attempt to break contact to avoid being killed by Israeli Defense Forces – in order to be able to fight in a future engagement.<sup>81</sup> Generally, all ground engagements occurred when Israeli Defense Forces entered

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<sup>77</sup> Amos and Issacharoff 2008, 76-121.

<sup>78</sup> Matthews 2008, 1-96.

<sup>79</sup> Helmer 2007, 1-85.

<sup>80</sup> Ibid., 47.

<sup>81</sup> Matthews 2008, 33-39.

into areas occupied by Lebanese Hezbollah fighters.<sup>82</sup> Rocket attacks were offensive in nature, but were launched for the stated purpose of retaliatory strikes against Israeli forces in Lebanon in the context of contested areas such as Shaba Farms or the Golan Heights and as such can be viewed as overall defensive operations.

Lebanese Hezbollah relied on attritional tactics throughout the Israeli-Lebanon 2006 War and this too is consonant with the proposed hybrid warfare theory. Principle seven emphasizes the use of attritional tactics in the employment of the hybrid force. These tactics manifest in both the physical and the cognitive domains to continually whittle away the adversary's forces and his will to use them. In the case of Lebanese Hezbollah, the physical manifestation of these attritional tactics occurred using mine and improvised mine warfare, mass use of indirect fire attacks – missiles, rockets, and mortar fire, and the use of anti-tank / anti-personnel ground ambushes.<sup>83</sup> None of these techniques were planned or executed to be decisive ground actions, but rather were engaged in as opportunity attritional targets. As such, Lebanese Hezbollah rarely massed outside of occasional swarming attacks which were multi-directional – as in the attacks along the southern Lebanon border.<sup>84</sup> Added to this were the cognitive aspects of attritional tactics in the use of the initial kidnapping of two Israeli Defense Force Soldiers, the historical threat of the use of suicide bombing, the repeated bombardment of Israeli civilian populations, and the rapid use of media to execute strategic information influencing operations.<sup>85</sup> In this case, attritional tactics also served to exploit gaps in conventional force Israeli logic and thereby served to extend the conflict to the benefit of Lebanese Hezbollah.

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<sup>82</sup> Ibid., 33-39.

<sup>83</sup> Mellies 2009, 98-121.

<sup>84</sup> Ibid., 87.

<sup>85</sup> Helmer 2007, 1-85.

## How Effective Were They? : The Effects of Hybrid Principles

Synthesizing the seven principles of hybrid warfare within the context of the 2006 Israel Lebanese Hezbollah War, the David and Goliath image of a weaker opponent besting a stronger one becomes quite clear. Although Lebanese Hezbollah received more damage than the Israel Defense Forces and was tactically defeated on multiple occasions throughout the thirty-four day conflict, Lebanese Hezbollah was able to take advantage of several critical factors in order to gain an operational and strategic victory. Despite their clear military and economic advantages, the Israeli Defense Forces were unable to meet the operational and strategic objectives of the military defeat of Lebanese Hezbollah. The court of public opinion in Israel, Lebanon, and throughout the world saw Israel as losing the conflict.<sup>86</sup> As a hybrid force, Lebanese Hezbollah was able to use its internal strengths of narrative, weapons mix, and tactics to overcome the weaknesses of its much stronger opponent.

Through asking why or how this happened, it becomes clear that Lebanese Hezbollah optimized its military organization to fight against a Western style conventional military organization. It did this through a combination of available equipment like anti-tank, anti-aircraft, anti-ship, and unconventional weapons - IED's - and flexible defensive tactics like fortified defense in depth and ambush type tactics. This was coupled with an adaptive use of media exploitation and messaging in combination with a near continuous rocket bombardment.<sup>87</sup> The umbrella of Lebanese Hezbollah's strategic objective contained these actions to prove that it could fight against Israel and survive. In doing so, Lebanese Hezbollah was able to bind the strategic objective of victory within the internal narrative of a Shia protector fighting against the existential threat of Israel. As a result, Lebanese Hezbollah acted as an agile, adaptive, and lethal

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<sup>86</sup> Mellies 2009, 83-99.

<sup>87</sup> Ibid., 83.

opponent that only had to continue to fight in order to achieve its objective and defeat its enemy. In this sense, the hybrid force gained a clear advantage through synergistic effects over its conventional opponent and achieved “victory” within the war.

## **World War II: Eastern Front (1941–1945): A First Look At The Soviet Partisan Network as a Hybrid Organization**

This monograph now conducts a qualitative and deductive analysis of historical case studies to explore and validate the proposed theory of hybrid warfare. In doing so, it attempts to parse examples of each principle to show its existence within the historical context of the case study. This case study examines the Soviet Partisan movement as a hybrid organization during World War II. It was selected because of its potential as a hybrid force that has not been previously analyzed. As a result, it offers a pristine example to which the proposed theory of hybrid warfare can be applied. The consequent analysis both confirm the Soviet Partisan movement as a hybrid force and validate the proposed theory and its attendant principles as being qualitatively present. A holistic synthesis also shows the relevance of the hybrid actor within the historical context – emphasizing the synergistic advantages that hybrid actors obtain versus a conventional force.

### **Strategic Context of the Soviet Partisan Movement**

The Soviet Partisan movement during World War II was a component of the Soviet war effort against Nazi Germany from 1941-1945.<sup>88</sup> In this conflict within World War II, the massive conventional forces of Nazi Germany fought against the massive conventional forces of the Soviet Union, which was augmented by the Soviet Partisan movement.<sup>89</sup> The war on the Eastern

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<sup>88</sup> Earl F. Zeimke, *Stalingrad to Berlin: The German Defeat in the East*, (Washington, DC: United States Army Center of Military History, 2002), 3-22.

<sup>89</sup> Edgar M. Howell, *The Soviet Partisan Movement: 1941-1945*, (Bennington, VT: Merriam Press, 1999), 6-11.

Front in 1941 began with the German invasion of the Soviet controlled Baltic states of Estonia, Latvia, Romania, and Lithuania as well as former Polish territory.<sup>90</sup> German armies attacked deep into the Soviet Union, decimating the population and threatening the survival of the Slavic nations and peoples. The Soviet Union responded with conventional military operations and irregular partisan operations.<sup>91</sup> The combined effect of these actions enabled the Soviet Red Army to counter-attack and regain control of lost territories. The conflict culminated in 1945 with the destruction of the Germany Army and occupation of Germany. In total, the war on the Eastern Front was the largest conventional military conflict in history and it resulted in an estimated 30 million deaths and the destruction of billions of dollars of infrastructure<sup>92</sup>.

In context, the German Army of the late 1930's and 1940s was the premier conventional military organization in the world.<sup>93</sup> As compared to the Red Army's contemporary turmoil, Germany's army had a centuries old military tradition extending back to the Kingdom of Prussia and Frederick the Great. Innovative technology augmented this extensive martial tradition in the form of Panzer, Panther, and Tiger tanks; towed and self-propelled artillery; fighter and bomber aircraft; and multiple individual and crew-served weapons systems.<sup>94</sup> In terms of concurrent experience, the German Army successfully invaded Poland in 1939 and had successfully dominated France in May of 1940, arguably controlling all of continental Europe by the end of 1940 – denoting not only structural proficiency, but also successful experience in the near term. This dominant military structure was governed by the ideology of the Nazi Party, which espoused world domination by the German “master race” of the Third Reich in order to restore German

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<sup>90</sup> Zeimke 2002, 23.

<sup>91</sup> Ibid., 3-22.

<sup>92</sup> David Glantz and Jonathan House, *When Titans Clashed: How The Red Army Stopped Hitler*, (Lawrence, KS: University of Kansas Press, 1995), 5-48.

<sup>93</sup> Ibid., 5-48.

<sup>94</sup> Ibid., 41.

prestige following its defeat in World War I.<sup>95</sup> Generically, the Nazi ideology can be considered a fascist movement which combined nationalism and anti-communism with multiple flavors of professed racism and anti-Semitism. The resultant belief structure within the military united conventional action and presented a single narrative to its adversary, the Red Army.

The Soviet Red Army of the early 1940's presents a much different picture. The near term history of the Red Army was framed by the Russian revolution of 1917, five years of civil war ending in 1923, and then fifteen years of mass industrialization and socio-political suppression.<sup>96</sup> During the fifteen years of Stalin's socio-political engineering of the communist system, nearly eleven million people were killed or imprisoned, including vast swathes of the Red Army. The dominant ideology was that of the Communist Party as interpreted by Joseph Stalin. Generically interpreted, communism – Leninism / Marxism – can be described as an ideology that advocated a classless, stateless, atheist social order with common ownership of all state resources. In practice this ideology in combination with Stalin's fear of a military or political coup resulted in several lethal purges within the Soviet military of anyone who voiced any type of disagreement.<sup>97</sup> As a result, the Red Army as an institution was devastated by the end of 1940 and was lacking in internal military strategic leadership. Additionally, the armored tank based force was primarily made up of the T-26 and BT tanks which were technologically inferior to contemporary German tanks - although the T-34 tank was in limited use at the time and was roughly equivalent to later Panzer tank models.<sup>98</sup>

The Soviet Partisan element emerged in 1941 in areas behind the German front as it pushed into Soviet territory. What became known as the Soviet Partisan network was comprised

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<sup>95</sup> Ibid., 47.

<sup>96</sup> Howell 1999, 4-22.

<sup>97</sup> Glantz and House 1995, 49.

<sup>98</sup> Howell 1999, 23-31.

of several elements including bypassed Red Army troops and political commissars, small groups of airborne units dropped behind German lines, and frustrated local workers and volunteers led by members of the People's Commissariat for Internal Affairs - NKVD – Stalin's Secret Police enforcers.<sup>99</sup> These disparate elements were brought together by their political ideology and the common threat of elimination by the occupying German forces. As the Partisan network formed, it initially operated as a semi-autonomous element conducting multiple harassing and attritional type activities against the occupying German Army.<sup>100</sup> As control began to be asserted through the local Communist political apparatus, these conventional and guerilla units formed into "annihilation" battalions that aimed to both destroy any resources which were available to the German Army and to disrupt German Army communications and command and control. To this end, the Partisan network used available conventional weaponry that had been left behind by retreating Red Army units, within a conventional Red Army organizational structure, and paired these with guerilla style tactics such as raids and ambushes. Many portions of the network, when unable to gain voluntary local support, turned to the use of criminal and terror type activities in order to supply themselves and coerce local support for their militant activities.<sup>101</sup> In doing so, the Soviet Partisan network formed itself into a hybrid force by 1943 that achieved significant disruptive effects against the German Army. These effects would later be synchronized with Red Army combat operations to create a synergistic effect in driving the German Army out of Soviet territory.<sup>102</sup> As a result, the Soviet Partisan network is validated as a successful hybrid organization that demonstrates the qualitative presence of the proposed principles of hybrid warfare.

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<sup>99</sup> *Ibid.*, 23-31.

<sup>100</sup> Zeimke 2002, 23.

<sup>101</sup> Howell 1999, 4-134.

<sup>102</sup> *Ibid.*, 5.

## **The Currency of Soviet Partisan Success – Or Show Me The Rubles**

When analyzed as a hybrid force, the Soviet Partisan network displays several strong characteristics within the context of the Eastern Front during World War II.

The first principle of hybrid war is that a hybrid force's composition, capabilities, and effects are unique to the force's own specific context. This context includes the temporal, geographic, socio-cultural, and historical setting in which the given conflict take place. The Soviet Partisan network formed in just such a specific enabling context. The historically harsh terrain of the eastern Russian steppes formed a unique context in which alternately both conventional and unconventional operations could successfully occur varying between the broad plains and the broken swathes of river and forest tracts.<sup>103</sup> In this manner, it was inevitable that large conventional formations operating in the open terrain would eventually be paired with complementary irregular forces operating in the pockets of dense broken terrain, which existed in the steppes. The Russian experience in World War I 1914-1917, the 1917 civil war within the Russia, and the spread of communism under Joseph Stalin had the effect of militarizing the Soviet population and instilling a level of instinctive discipline. This unique circumstance enabled the recruitment of much broader portions of the available population to form the hybrid Partisan network than would have otherwise been available.<sup>104</sup>

The second principle posits that a specific ideology exists within the hybrid force that creates an internal narrative to the organization. This ideology is inherently linked to the strategic context and is grounded within the socio-cultural, religious identity of the hybrid force. The resulting narrative serves to redefine the extant rules within the strategic context. In examining this principle, we return to the ideology of Communism as applied by Joseph Stalin. Communism

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<sup>103</sup> Ibid., 8.

<sup>104</sup> Ibid., 5.

itself merged the ideas of government and the ownership of resources, enabling a broad range of components such as people and physical resources, which could be used to form a hybrid force. Under Stalin, this ideology was magnified to an extreme which manifested itself through government enforcement via mass brutality at both the individual and collective level.<sup>105</sup> As a result, a narrative was crafted in which the overt loyalty of any Soviet citizen was absolute pending the threat of dire consequences. In a sense, the overt display of loyalty to the communist party as a result of nation-wide paranoia became a religion in and of itself – even though the ideology itself was atheist. In combination, the ideology and the paired narrative made both loyal personnel and physical resources readily available to any entity which supported the state’s desires – specifically to both the Red Army and the Partisan Network.

The third principle is the hybrid force’s perception of an existential threat by a potential adversary. This perceived threat drives the hybrid force to abandon conventional military wisdom in order to find ways to achieve long-term survival. In this example, the Partisan network was clearly motivated by the existential threat posed to them by the German Army and the Nazi government.<sup>106</sup> Conceptually, the Soviet leadership and the citizenry could perceive this threat through the published work of the Nazi leader, Adolf Hitler. In *Mein Kampf* and *Zweites Buch*, Hitler identified Jewish people including Slavic Jews as a target for elimination. In a much more specific sense Hitler outlined the concept of *Lebensraum* which called for the creation of a German “living space” in the Soviet Union and the required elimination of the “flawed” Slavic regime that controlled the region. Following the breaking of the German-Soviet Non-aggression Pact and the invasion of Soviet controlled Poland, practical examples of this professed philosophy played out.<sup>107</sup> Individual Slavic Jews were taken to concentration camps and the existing

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<sup>105</sup> Glantz and House 1995, 1-14.

<sup>106</sup> Ibid., 28-48.

<sup>107</sup> Howell 1999, 43-63.

Communist governments in the conquered territories were destroyed and party members were eliminated. In a further practical example of the existential threat posed upon the Soviet populace, the “Hunger Plan” as outlined in Operation Barbarossa was put into effect during the invasion in 1941 – prioritizing all food production and consumption for the German Army and the German homeland over local citizens – effectively starving the local population.<sup>108</sup> These conceptual and practical examples clearly motivated the hybrid Soviet Partisan organizations as they realized that few viable choices were available to them in surviving life under German occupation in the Eastern Front.

Principle four posits that in a hybrid war that there exists a capability overmatch between the hybrid force and a potential adversary. The hybrid force contains less conventional military capability in comparison to its adversary and therefore must seek a way to offset this apparent advantage in military capability. With the defeat and retreat of the Red Army in 1941 and 1942, the only remaining Soviet military force was the hybrid Soviet Partisan network. The Partisan network had access to some battlefield remnants, available small arms, limited numbers of horses, and limited local supplies.<sup>109</sup> In contrast, the German Army was possessed of a massive conventional armory of tanks and airplanes; and benefitted from both the conventional military supply system and the locally imposed government systems which exerted control over local resources.<sup>110</sup> As a result, a clear overmatch in capability existed at both the offensive and logistical level between the semi-isolated Soviet Partisan network and the relatively unimpeded German Army.

The fifth principle states that a hybrid force contains both conventional and unconventional elements. These elements are often comprised of “accepted” military technology

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<sup>108</sup> Ibid., 43-63.

<sup>109</sup> Zeimke 2002, 103.

<sup>110</sup> Howell 1999, 43-74.

and non-military, guerrilla type technology. The elements may also include the use of terrorist or other criminal tactics. These combined capabilities create an asymmetric advantage for the hybrid force. In the case of the Soviet Partisan network, this principle is fairly clear-cut. The hybrid force was comprised of elements of bypassed Red Army units and Airborne units which were organized and equipped as conventional military units.<sup>111</sup> The Soviet Partisans were also comprised of volunteers and political party members who had no military training and were equipped with whatever weapons became available, including old World War I weapons and recently captured German small arms. Both elements utilized a mixture of conventional military tactics such as raids and ambushes, along with irregular activities such as sabotage and harassing attacks.<sup>112</sup> The network also commonly stole food and local resources, as well as conducting terror and intimidation type activities against known German sympathizers.

Hybrid forces seek to use defensive type operations: This is the sixth principle of hybrid warfare proposed in this work. The hybrid force seeks to defend its existence and will employ an overall strategy of defensive operations. These operations will often include offensive components, but the overarching intent will still be one of defense. In the case of the Soviet Partisan network, this principle can be recognized in the fact that the majority of the small scale operations executed by this hybrid organization were conducted with the primary intent of ensuring the survival of the organization. The secondary purpose was in buying time for the return of the Red Army – in essence defending any currently held resources and small territories until a larger liberation could be effected through the return of the Red Army.<sup>113</sup> As a result, the operationally defensive orientation of this hybrid organization is revealed in the intent of its sometimes offensive operations.

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<sup>111</sup> Glantz and House 1995, 65.

<sup>112</sup> Howell 1999, 88-128.

<sup>113</sup> Ibid., 129-134.

The Soviet Partisan movement relied on attritional tactics through the duration of that conflict on the Eastern Front. This is consistent with the seventh principle of hybrid warfare in that hybrid organizations utilize attritional tactics to gain advantages in the employment of the hybrid force. These tactics will manifest in both the physical and the cognitive domains in order to continually whittle away the adversary's forces and his will to use them. The overarching Soviet intent for the organization was to degrade German C2 and to disrupt the German Army's rear area. In the example of the Soviet Partisan network, the attritional nature of this hybrid organization manifests itself in the repeated attacks on German Army supply lines and rear echelon formations.<sup>114</sup> These attacks were mostly conducted as small-scale raids and ambushes against German forces. Ultimately, this attritional strategy helped to enable Red Army victories during Operation Bagration and subsequent offensive operations by both distracting the German Army and keeping it occupied in protecting its flanks and rear areas.

### **The Synergistic Effects of Hybrid Principles in Action**

Synthesizing the seven principles of hybrid warfare within the context of the Eastern Front of World War II, the true strength and applicability of hybrid organizations becomes clear. In this case study, the hybrid Soviet Partisan network was able to disrupt the German Army, the pre-eminent conventional military force of World War II, and enable the ultimate victory of the Soviet Red Army by shaping the German rear area from 1941-1944. Although the Soviet Partisan network did not achieve any type of unilateral victory over the German Army, it did achieve limited tactical success and enabled both the operational and strategic military success of the Red Army.<sup>115</sup> In essence, the Soviet Partisan network stole German momentum and created

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<sup>114</sup> Ibid., 115.

<sup>115</sup> Ibid., 129.

operational space for the Red Army to build combat power in 1942 and conduct large-scale offensive operations in 1943 and 1944.<sup>116</sup>

The Soviet Partisan movements' synergistic effects were crucial in the larger operational plans of the Soviet Red Army. Without the ability to disrupt and occupy German forces, it is quite possible that the Red Army would not have been able to gain the momentum necessary to turn the tide of the German advance and ultimately defeat the German Army during World War II. Therefore, the critical placement of the Soviet Partisan movement as a hybrid force – with its synergistic effects – provided a necessary advantage to the Red Army in achieving overall victory against the Germans.

## **Validation of a Theory**

This monograph has set out to conclude a valid theory of hybrid warfare through a synthesis of military theory and historical trends. In doing so, a qualitative theory and several supporting principles have been identified and evaluated in relation to the two very unique historical case studies: The 2006 Israeli-Lebanon War and the Soviet Partisan movement on the Eastern Front during WWII. The classic example of Lebanese Hezbollah – which generated so much discourse in the United States about hybrid warfare because of the surprising success of Lebanese Hezbollah against the Israeli Defense Forces in 2006 – is fundamentally important to any analysis of hybrid warfare as the first recognized event of its kind. As such, Lebanese Hezbollah serves as the benchmark for all hybrid warfare examples – and any theory that attempts to capture the essence of hybrid warfare must first address this benchmark. Analysis of the Soviet Partisan case is particularly useful in that it first adds to the existing literature of hybrid warfare. Secondly, the Soviet Partisan movement occurred within the largest military conflict in the era of modern warfare – and garnered significant, measurable effects. The result of this dual

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<sup>116</sup> Zeimke 2002, 103.

analysis has been the affirmation of the proposed theory and the recognition of the qualitative presence of each of the proposed principals within the 2006 war between Israel and Lebanese Hezbollah and the Soviet Partisan movement of World War II – leading to the potential for future application of the theory to emerging threat scenarios to aid military professional understanding.

## **The Significant Implications of Hybrid War Theory**

Many implications exist because of the validation of this theory. Perhaps the most significant result of a relevant theory is the ability to anticipate emergent hybrid organizations. Analysis of existing and emerging threat organizations can assist in the classification of threats so that regional forces can holistically understand behaviors as they emerge. This classification and understanding of behaviors then lends itself to predictive assessments of likely hybrid actions – in keeping with the proposed theory of hybrid warfare.

Specifically in the Middle East, this theory explains with some plausibility the emergence and the behavior of Lebanese Hezbollah as one of the preeminent hybrid threats today. In and of itself this is beneficial to the United States and its allies as they seek to first understand and then predict Lebanese Hezbollah's actions in Lebanon, the Middle East, and the Globe. This enables military forces to understand not only the capabilities of the hybrid force, but also the motivations and likely limitations of such a force. For example, understanding Lebanese Hezbollah as a defensively oriented force motivated by a perceived existential threat alters the conventional calculus that is often used in assessing this organization. Furthermore, this understanding then allows the United States Military forces to allocate resources and prepare contingency type responses to these potential actions. In seeking to understand these motivations and proclivities, US and allied forces are more likely to encounter success as they interact with this hybrid threat organization.

Within the Pacific region, the theory of hybrid warfare might be used to actively assess and monitor emerging threats as Chinese interests and capabilities increase and the region balance

of power between Asian land armies adjust. Historically, an assessment such as this could have helped to explain the Viet Cong and its relationship with the North Vietnamese Regular Army during the Vietnam War. For Special Operating Forces in particular, the theory can assist in identifying non-state actors who may be likely to seek sponsorship and access to conventional type weapon systems. In identifying these groups, actions can be taken to isolate them using all elements of national power before they emerge as truly dangerous hybrid threats.

## **Potential Outcomes**

There are many potential outcomes from the realization of a valid theory of hybrid warfare. One of these is in terms of US Army force structure. As the US Army continues to define the future threat environment, this expanded understanding will be fundamental. The basic understanding that a hybrid threat will seek to gain advantage from its internally synergistic capabilities through the combination of conventional and unconventional technologies will allow the US Army to build equipment and weapon systems that are competitive against conventional opponents, yet retain a level of resiliency against unconventional threats. Ad hoc examples of these types of modifications exist in terms of anti-Improvised Explosive Device (IED) electronic countermeasures that have been used in the wars in both Iraq and Afghanistan. Another example is in the basic construction of vehicles such as a V-hull of the Stryker vehicle to resist IED attacks while maintaining a premier conventional urban warfare capability in terms of troop carrying and speed. This utility in combining technological benefits in speed and lethality with survivability against irregular threats is essential to the US Army's future success on the hybrid battlefield.

Another opportunity in adjusting force structure to combat hybrid threats is in focusing on the development and incorporation of technology. In this respect, technology could be developed to specifically target the fusion of hybrid capabilities. For example, although the combination of conventional and unconventional capabilities and tactics enables a synergistic advantage – the same combination also produces organizational seams between the different

types of components. For example, in the case of Lebanese Hezbollah a seam exists between the highly trained conventional type forces which utilize high-end weapon systems and the less well trained militia. This seam can be targeted and exploited by concentrating on the nodal linkages of command and communication between the different elements of the conventional and irregular force. Another seam potentially exists between the criminal elements and the military type elements of Lebanese Hezbollah that could be potentially targeted by Military Information Support Operations.<sup>117</sup> As such, the theory of hybrid warfare provides a solid benefit to the US Army in responding to future hybrid threats.

The tactics used by US Army forces can also benefit from a greater understanding of hybrid threats in many areas such as intelligence analysis and targeting. In terms of intelligence analysis, the theory provides a predictive template that can be used to baseline the analysis of a hybrid threat. For example, if a potential threat displays a tendency towards the fusion of multiple types of available assets and techniques - conventional, irregular, criminal, and terrorist, while operating under a perceived existential threat, a Military Intelligence Analyst can apply the Hybrid Theory of Warfare to look for the existence of other likely aspects of the hybrid threat. In this hypothetical case, the analyst can look for indicators of the presence of the other principles of hybrid warfare. This analysis could likely lead to the identification of a defensive orientation and a specific ideology which could in turn be used to develop a predicted enemy situational template. Again, the hybrid theory itself provides a basis for US Army success against hybrid threats on the future battlefield.

United States Army doctrine can also benefit from the theory of hybrid warfare. *Army Doctrinal Publication 3.0 : Unified Land Operations* predicts that hybrid threats will be a

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<sup>117</sup> This monograph does not seek to explore the tactical, operational, or strategic seams between LH and its state sponsors; although these seams do likely exist and are thereby targetable.

constant variable upon the future battlefield. The manual also proscribes a specific manner in which to conduct operations on this future battlefield. The manner described is the combination of Combined Arms Maneuver to conventional, high-end military adversaries and the application of Wide Area Security techniques against irregular force structures and environments. Through the selective application of these two techniques, US Army forces can attempt to balance and eventually offset a hybrid force's advantages. Essentially, if the US Army can determine the how and the why of a hybrid force's actions – through the application of hybrid warfare theory – the techniques of Combined Arms Maneuver and Wide Area Security can then be used to engage with and divide the conventional and unconventional aspects of the hybrid force. This division will, in essence, strip the hybrid force of its synergistic advantage and enable the specific targeting of individual elements within the hybrid force. As a result, the hybrid force will be much reduced in effectiveness and will be vulnerable to the US Army's own combinations of conventional and irregular forces - Special Operating Forces. This will ultimately allow US forces to retain control of the rules and tempo of the battlefield.

## **Implications for Future Research**

Although this monograph has explored and attempted to answer several questions, the process of inquiry itself has unearthed additional questions that should be explored in order to fully understand hybrid warfare. For example, as an understanding of hybrid threat formation develops, additional questions arise with regard to how long hybrid organizations exist and whether or not they actually serve as a transitory state. Frank Hoffman's research indicates that hybrid organizations may indeed only briefly emerge and exist as transitory entities. An analysis of historical examples in a long view may enable a better understanding of this question. Initial trends seem to indicate that hybrid organizations suffer one of two fates: (1) they are defeated or absorbed by conventional forces – as in the case of the Viet Cong and the Jewish Rebellion of 66 AD; or (2) they transition to more purely conventional forces over time – as in the cases of the

US Army as it evolved over time, and the Soviet Partisan Network as it merged into the Red Army. If this trend holds true, it may shed additional light on the problem of hybrid threats and offer predictive insight into the further evolution of hybrid organizations such as Lebanese Hezbollah – including the longevity of hybrid organizations.

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### Author's Discussions with Israeli Defense Experts

- Joint Special Operations University (JSOU) Research Study 2012. *Hybrid Warfare Research Study 2012*. Research Study, Israel: Richard B. Johnson and Timothy B. McCulloh, 2012. This study included interviews of Israeli Defense Force (IDF) practitioners and policy professionals in Tel Aviv, Jerusalem and Herzeliyah. Each interview was executed as a non-attributional discussion and adhered to applicable policies. Due to the sensitive nature of ongoing Israeli security operations, personally identifying information is not provided in this monograph.
- Retired IDF Military Intelligence Officer and Terrorism Analyst. Interview by Richard B. Johnson and Timothy B. McCulloh, 6 March 2012.
- Retired Israeli Intelligence Officer and Terrorism Analyst. Interview by Richard B. Johnson and Timothy B. McCulloh, 6 March 2012.
- Israeli Strategist. Interview by Richard B. Johnson and Timothy B. McCulloh, 7 March 2012.
- Israeli Diplomat. Interview by Richard B. Johnson and Timothy B. McCulloh, 7 March 2012.
- Retired IDF General Officer and Land Warfare Analyst. Interview by Richard B. Johnson and Timothy B. McCulloh, 8 March 2012.
- Retired IDF General Officer and Member of the Winograd Commission. Interview by Richard B. Johnson and Timothy B. McCulloh, 8 March 2012.
- Israeli Military Analyst. Interview by Richard B. Johnson and Timothy B. McCulloh, 8 March 2012.

Israeli Military Analyst. Interview by Richard B. Johnson and Timothy B. McCulloh, 9 March 2012.